



Business Correspondent/Facilitator

Curriculum Outline

Duration: 2 Months

QP Code: BSC/Q8401 Level-4

Module 1: Introduction to the Banking Sector and the Job Role of Business Correspondent & Business Facilitator

8 hrs

Topics covered:

- Discuss the objectives and benefits of the Skill India Mission
- Describe the scope of Banking Industry and its sub-sectors
- Discuss job role and opportunities for a Business Correspondent & Business Facilitator
- List the basic terminologies used in the banking services

Module 2: Source Customers for Banking Services

40 hrs

Topics covered:

- Apply proper methods for customer segmentation
- Discuss the different types of documents required for application process
- Prepare sample reports on status of the sourced customers and targets achieved

Module 3: Assist Customers with Bank Application Process

80 hrs

Topics covered:

- Apply appropriate practices to assist the customers in opening account
- Discuss various supporting documents required with specifications during opening account for customers
- Discuss the standard format to prepare reports for banking operations
- Create a sample schedule to undertake follow-up visits to the customers

Module 4: Perform Regular Banking Transactions for Customers

80 hrs

Topics covered:

- Apply appropriate procedures to perform regular banking transactions using different modes such as a banking kiosk, POS machine, etc.
- Role play a situation on how to handle different types of customer queries and complaints related their account
- Explain the methods to advise customer on managing their accounts, services and other products
- Explain the standard procedure of account termination, and documents required for the same

Module 5: Perform Administrative Tasks

64 hrs

Topics covered:

- Apply appropriate procedures to assist the supervisor in setting revenue/account target
- Describe the various sources to obtain list of defaulters and default loan accounts
- Prepare sample reports, like periodic reports on status of customers, bank transactions, number of complaints, targets achieved and review future targets

Module 6: Employability Skills

64 hrs

Topics covered:

- Introduction to employability skills
- Constitutional values – citizenship
- Becoming a professional in the 21st century
- Basic English skills
- Career development & goal setting
- Communication skills
- Diversity & inclusion
- Essential digital skills
- Entrepreneurship
- Customer service
- Getting ready for apprenticeship & jobs

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