

30 Day Lesson Plan

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18
19	20	21	22	23	24
25	26	27	28	29	30

Employee No.: _____





Name: _____

TOPIC FOR THE DAY: ACCOUNT OPENING

Objectives

- To be able to understand the KYC norms thoroughly
- To understand the end-to-end process of Account Opening

Steps to Follow :





Complete  E-LEARNING	SPRINT ACCOUNT OPENING MODULE Time Required: 30 minutes
Read  IQUEST	Process > Branch > Process Flows > Account Opening Process Branch > Ready Reckoner > KYC Grid Time Required: 30 minutes
Role of  BUDDY	<ul style="list-style-type: none"> ➤ Explain the components of the AOF ➤ Make the inductee fill in the AOF ➤ Demonstrate an Account Opening Process ➤ Show sample Welcome Kit and contents of the same ➤ Emphasise importance of Welcome Calling BUDDY time: 30 minutes
Take  ACTION	Take an Account Opening form and fill the entire form and complete the process till despatch to RPC.

TOPIC FOR THE DAY: ATM & DEBIT CARD

Objectives

- To be able to understand the functionalities of an ATM
- To clearly understand the differential features of types of debit cards.

Steps to Follow :

Complete  E-LEARNING	SPRINT ATM Product SPRINT Debit card Product Time Required: 40 minutes + 40 minutes
Read  IQEST	Channel > ATM Product > Liabilities > Deposits > Debit card- Ncash, HPCL, Smart card Time Required: 30 minutes
Role of  BUDDY	Test understanding of functionality of ATMs ➤ Test understanding of features of debit cards - Ncash, HPCL, SMART ➤ Explain withdrawal limits for each type of card ➤ Any latest enhancements BUDDY time: 20 minutes
Take  ACTION	Use all features of the ATM once your own debit card is activated.

