FRONT DESK OFFICER - FINANCIAL INSTITUTIONS

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TOTAL DURATION: 250 HOURS

  I.   **THEORY: 125 HOURS**
  II. **PRACTICAL: 125 HOURS**

OBJECTIVE

Being the face of an organization demands basic HR and IT Skills. This course would entitle you to be a professional front desk officer who is proficient in the task. The course covers basic front office job skills, basic IT Skills and office management software skills. The prime focus is to create a qualified front desk officer for financial institutions.

EXIT PROFILE

- ✓ Understanding front desk office skills on MSOffice
- ✓ Able to Describe the various products of Banks in detail
- ✓ Gain an insight of the various remittance and collection facilities provided by banks
- ✓ Can Describe the various key processes pertaining to Retail Banking segment of banks in India
- ✓ List various products of banks, procedures and documents of various products
- ✓ Explain code of conduct and guidelines as prescribed by regulators
- ✓ Advise customers on processes pertaining to retail banking segments of banks in India
- ✓ Undertake microfinance activities
- ✓ Manage multiple stakeholders & Communicate effectively at workplace
- ✓ Work effectively using the latest information technology and Internet

CAREER PATH

- ✓ Front Desk Officer

STUDENTS' PREREQUISITE

- ✓ Any Graduate + Basic computer knowledge

COURSE OUTLINE

- ✓ Basics of Banking
- ✓ MS Word
- ✓ MS PowerPoint
- ✓ MS Excel
- ✓ Emails
- ✓ Regulatory environment
- ✓ Generic products
- ✓ Specific bank products of a private sector bank
- ✓ Specific bank processes of a private sector bank
- ✓ Source new customers

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- ✓ Communicate effectively and achieve customer satisfaction
- ✓ Maintain integrity and ethics
- ✓ Focus on teamwork

MARK DISTRIBUTION

Subject	Time (In hours)		Total (In hours)	Marks		Total
	Theory	Practical		Theory	Practical	
MS Word	27	27	54	10	100	110
MS PowerPoint	27	27	54	10	100	110
MS Excel	36	36	72	20	100	120
Emails	8	8	16	5	100	105
Basics of Banking	*	*	18	5	100	105
Banking & Related Information	*	*	36	0	0	0
Total	125	125	250 hrs	50	500	550

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MODULE IN DETAIL

BASICS OF BANKING   (18 HOURS)

- ✓ Describe Evolution of Money and Banking
- ✓ Describe Financial Intermediaries and Role of Banks
- ✓ Differentiate between asset and liability products
- ✓ List about Payment & Collection procedures for banks
- ✓ Advise customers on using alternate service channels and technology initiatives
- ✓ Describe the importance of Financial Inclusion
- ✓ Differentiate between Payment Banks, Small Banks and other banks

MS WORD   (54 HOURS)

Text Basics
- ✓ Typing the text, Alignment of text
- ✓ Editing Text: Cut, Copy, Paste, Select All, Clear
- ✓ Find & Replace

Text Formatting and saving file
- ✓ New, Open, Close, Save, Save As
- ✓ Formatting Text: Font Size, Font Style
- ✓ Font Color, Use the Bold, Italic, and Underline
- ✓ Change the Text Case
- ✓ Line spacing, Paragraph spacing
- ✓ Shading text and paragraph
- ✓ working with Tabs and Intends

Working with Objects
- ✓ Shapes, Clipart and Picture, Word Art, Smart Art

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- ✓ Columns and Orderings - To Add Columns to a Document
- ✓ Change the Order of Objects
- ✓ Page Number, Date & Time
- ✓ Inserting Text boxes
- ✓ Inserting Word art
- ✓ Inserting symbols
- ✓ Inserting Chart

Header & Footers

- ✓ Inserting custom Header and Footer
- ✓ Inserting objects in the header and footer
- ✓ Add section break to a document

Working with bullets and numbered lists

- ✓ Multilevel numbering and Bulleting
- ✓ Creating List
- ✓ Customizing List style
- ✓ Page bordering
- ✓ Page background

Tables

- ✓ Working with Tables, Table Formatting
- ✓ Table Styles
- ✓ Alignment option
- ✓ Merge and split option

Styles and Content

- ✓ Using Build- in Styles, Modifying Styles
- ✓ Creating Styles, Creating a list style
- ✓ Table of contents and references
- ✓ Adding internal references
- ✓ Adding a Footnote
- ✓ Adding Endnote

Merging Documents

- ✓ Typing new address list
- ✓ Importing address list from Excel file
- ✓ Write and insert field
- ✓ Merging with outlook contact
- ✓ Preview Result
- ✓ Merging to envelopes
- ✓ Merging to label
- ✓ Setting rules for merges
- ✓ Finish & Merge options

Sharing and Maintaining Document

- ✓ Changing Word Options
- ✓ Changing the Proofing Tools
- ✓ Managing Templates

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- ✓ Restricting Document Access
- ✓ Using Protected View
- ✓ Working with Templates
- ✓ Managing Templates
- ✓ Understanding building blocks

Proofing the document
- ✓ Check Spelling As You Type
- ✓ Mark Grammar Errors As You Type
- ✓ Setting AutoCorrect Options

Printing
- ✓ Page Setup, Setting margins, Print Preview, Print
- ✓ Print Preview, Print

MS EXCEL   (72 HOURS)

Introduction to Excel
- ✓ Introduction to Excel interface
- ✓ Understanding rows and columns, Naming Cells
- ✓ Working with excel workbook and sheets

Formatting excel work book
- ✓ New, Open, Close, Save, Save As
- ✓ Formatting Text: Font Size, Font Style
- ✓ Font Color, Use the Bold, Italic, and Underline
- ✓ Wrap text, Merge and Centre
- ✓ Currency, Accounting and other formats
- ✓ Modifying Columns, Rows, & Cells

Perform Calculations with Functions
- ✓ Creating Simple Formulas
- ✓ Setting up your own formula
- ✓ Date and Time Functions, Financial Functions
- ✓ Logical Functions, Lookup and Reference
- ✓ Functions Mathematical Functions
- ✓ Statistical Functions, Text Functions

Sort and Filter Data with Excel
- ✓ Sort and filtering data
- ✓ Using number filter, Text filter
- ✓ Custom filtering
- ✓ Removing filters from columns
- ✓ Conditional formatting

Create Effective Charts to Present Data Visually
- ✓ Inserting Column, Pie chart etc
- ✓ Create an effective chart with Chart Tool
- ✓ Design, Format, and Layout options
- ✓ Adding chart title
- ✓ Changing layouts

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- ✓ Chart styles
- ✓ Editing chart data range
- ✓ Editing data series
- ✓ Changing chart

Analyze Data Using PivotTables and Pivot Charts
- ✓ Understand PivotTables, Create a PivotTable
- ✓ Framework Using the PivotTable and PivotChart
- ✓ Create Pivot Chart from pivot Table
- ✓ Inserting slicer
- ✓ Creating Calculated fields

Protecting and sharing the work book
- ✓ Protecting a workbook with a password
- ✓ Allow user to edit ranges
- ✓ Track changes
- ✓ Working with Comments
- ✓ Insert Excel Objects and Charts in Word Document and Power Point Presentation

Use Macros to Automate Tasks
- ✓ Creating and Recording Macros
- ✓ Assigning Macros to the work sheets
- ✓ Saving Macro enabled workbook

Proofing and Printing
- ✓ Page setup, Setting print area, Print titles
- ✓ Inserting custom Header and Footer
- ✓ Inserting objects in the header and footer
- ✓ Page Setup, Setting margins, Print Preview, Print
- ✓ Enable back ground error checking
- ✓ Setting AutoCorrect Options

MS POWERPOINT   (54 HOURS)

Setting Up PowerPoint Environment
- ✓ New, Open, Close, Save, Save As
- ✓ Typing the text, Alignment of text
- ✓ Formatting Text: Font Size, Font Style
- ✓ Font Color, Use the Bold, Italic, and Underline
- ✓ Cut, Copy, Paste, Select All, Clear text
- ✓ Find & Replace
- ✓ Working with Tabs and Intends

Creating slides and applying themes
- ✓ Inserting new slide
- ✓ Changing layout of slides
- ✓ Duplicating slides
- ✓ Copying and pasting slide
- ✓ Applying themes to the slide layout

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- ✓ Changing theme color
- ✓ Slide background
- ✓ Formatting slide background
- ✓ Using slide views

Working with bullets and numbering

- ✓ Multilevel numbering and Bulleting
- ✓ Creating List
- ✓ Page bordering
- ✓ Page background
- ✓ Aligning text
- ✓ Text directions
- ✓ Columns option

Working with Objects

- ✓ Shapes, Clipart and Picture, Word Art, Smart Art
- ✓ Change the Order of Objects
- ✓ Inserting slide header and footer
- ✓ Inserting Text boxes
- ✓ Inserting shapes, using quick styles
- ✓ Inserting Word art
- ✓ Inserting symbols
- ✓ Inserting Chart

Hyperlinks and Action Buttons

- ✓ Inserting Hyperlinks and Action Buttons
- ✓ Edit Hyperlinks and Action Button
- ✓ Word Art and Shapes

Working with Movies and Sounds

- ✓ Inserting Movie From a Computer File
- ✓ Inserting Audio file
- ✓ Audio Video playback and format options
- ✓ Video options, Adjust options
- ✓ Reshaping and bordering Video

Using SmartArt and Tables

- ✓ Working with Tables, Table Formatting
- ✓ Table Styles
- ✓ Alignment option
- ✓ Merge and split option
- ✓ Converting text to smart art

Animation and Slide Transition

- ✓ Default Animation, Custom Animation
- ✓ Modify a Default or Custom Animation
- ✓ Reorder Animation Using Transitions
- ✓ Apply a Slide Transition, Modifying a
- ✓ Transition, Advancing to the Next Slide

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Using slide Master
- ✓ Using slide master
- ✓ Inserting layout option
- ✓ Creating custom layout
- ✓ Inserting place holders
- ✓ Formatting place holders

Slide show option
- ✓ Start slide show
- ✓ Start show from the current slide
- ✓ Rehearse timing
- ✓ Creating custom slide show

Proofing and Printing
- ✓ Check Spelling As You Type
- ✓ Setting AutoCorrect Options
- ✓ Save as video
- ✓ Save as JPEG files
- ✓ Save as PowerPoint Show file
- ✓ Print Preview, Print

EMAILS   (16 HOURS)
- ✓ Introduction to Emails
- ✓ Types of emails
- ✓ Creating and sending email messages
- ✓ Formatting text and paragraphs
- ✓ Reading email headers
- ✓ Organizing mail

REGULATORY ENVIRONMENT   (36 HOURS)
- ✓ Describe Introduced to the functions of RBI, SEBI and IRDA
- ✓ Explain importance of AML and KYC with the documents required to customers
- ✓ Describe the role of Banking Ombudsman
- ✓ Explain the need for BCSBI
- ✓ Learn about Negotiable Instruments Act

GENERIC PRODUCTS
- ✓ Explain features and benefits of deposit products
- ✓ Explain regulations and functioning of various NRI accounts to customers
- ✓ List eligibility criteria, interest rates and documentation of various types of loans
- ✓ Understand the collections process and the outsourcing/ centralization procedures
- ✓ Get introduced to Insurance, Mutual Funds and NISM

SPECIFIC BANK PRODUCTS OF A PRIVATE SECTOR BANK
- ✓ List the savings account products of a leading private bank
- ✓ List the current account products of a leading private bank

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- ✓ Explain different types of FD's
- ✓ Explain benefits, usages and precaution required while using debit card
- ✓ Calculate interest rates on credit cards
- ✓ Explain benefits and risks of using credit cards
- ✓ Explain the concepts of NPV, IRR, Repayment and Amortization
- ✓ Explain the features of the Home Loan, Auto Loan and Personal Loan products of that leading bank with interest and EMI calculation
- ✓ List the Mutual Fund, Life Insurance and General Insurance products of that leading bank
- ✓ Describe features of Jewel Loan, Kisan and NRI products of that leading bank.

SPECIFIC BANK PROCESSES OF A PRIVATE SECTOR BANK

- ✓ List the process for cash transactions and remittances
- ✓ List the process for clearing transactions
- ✓ Correctly fill account opening forms for savings bank
- ✓ List the tab banking process
- ✓ List the Current Account opening process
- ✓ Explain Fixed Deposit opening process
- ✓ Prepare a check list for checking the validity of cheques and processing the same
- ✓ List the fraud prevention process
- ✓ List the KYC document
- ✓ List the AML process
- ✓ Learn about the audit and compliance process.

SOURCE NEW CUSTOMERS

- ✓ Segment prospective customers according to demographics for area assigned.
- ✓ Approach prospective customers through various methods.
- ✓ Ascertain financial goals of customers and suggest appropriate products
- ✓ Explain to prospective customer, the terms and conditions of product
- ✓ Explain the KYC policy and assist the customer in completing the application formalities.
- ✓ Obtain the requisite documents with the application.
- ✓ Record details of the customers acquired customer in requisite systems.
- ✓ Prepare and submit periodic reports on status of acquired customers to supervisor/ manager.
- ✓ Discuss and set revenue/ account targets with supervisor/ manager, if applicable.
- ✓ Prepare reports on targets achieved.

COMMUNICATE EFFECTIVELY AND ACHIEVE CUSTOMER SATISFACTION

- ✓ Listen attentively and paraphrase effectively in order to understand the customer.
- ✓ Be sensitive to: language, gender, cultural and social differences in addressing customers, superiors and colleagues.
- ✓ Maintain: positive attitude, correct body language, dress code, gestures and etiquette.
- ✓ Describe work output requirements, and receive feedback with positive attitude.
- ✓ Cooperate, coordinate, and collaborate to achieve shared goals.
- ✓ Address problems by educating, eliminating or escalating.

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✓ Aim to gain customer loyalty and satisfaction.

MAINTAIN INTEGRITY AND ETHICS

✓ Refrain from indulging in unfair trade and/or corrupt practices.
✓ Maintain records meticulously.
✓ Protect customer's information.
✓ Protect data and information related to business or commercial decisions.
✓ Avoid misrepresentation or misinformation.
✓ Demonstrate and practice ethics in day-to-day processes.
✓ Avoid defaming products and services of competition.

FOCUS ON TEAMWORK

✓ Share relevant inputs, feedback and insights to build mutual trust.
✓ Exchange, defend and rethink ideas.
✓ Support team members to accomplish goals.
✓ Facilitate group decision making and deal productively with conflict.

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