



**INDIAN INSTITUTE OF BANKING & FINANCE**

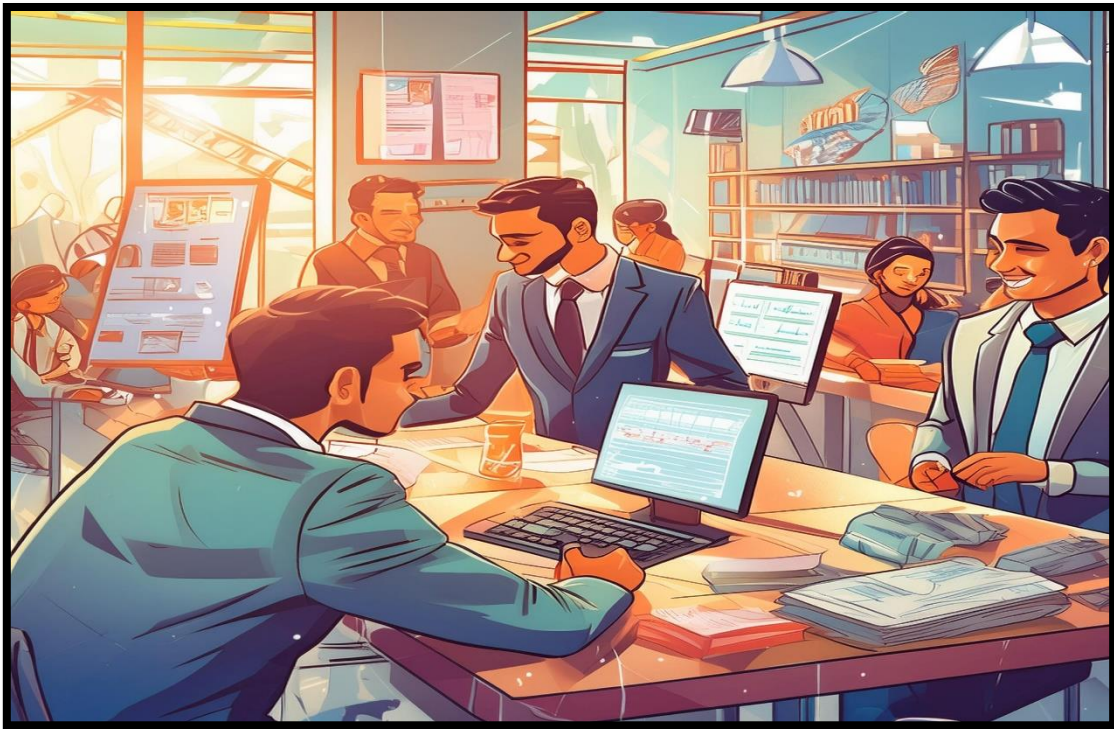
(An ISO 21001:2018 Certified Institute)

**Professional Development Centre – West Zone**

**“Program on Effective Branch Management with Basic Credit Appraisal”**

**In Virtual Mode**

**From 24<sup>th</sup> to 26<sup>th</sup> June 2024**



**Open to Members & Non-Members**

**Individual participants can also register for the programme at their own cost**

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Program Co-Ordinators : Mr. Shiv Kumar Gupta & Shijoy Joseph  
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**Address :192, Maker Tower, F Wing, 19<sup>th</sup> Floor, Cuffe Parade Mumbai - 400005.**

**Website : [www.iibf.org.in](http://www.iibf.org.in)**

## BRIEF BACKGROUND

Established on 30<sup>th</sup> April 1928, IIBF which is an “Institute of the Bankers, for the Bankers and by the Bankers” has during its 96 years of service been actively involved in examination, training & academics and has emerged as a premier institute in banking and finance education.

Considering the emerging requirements of the bankers in the ever-changing dynamic environment, IIBF has been providing quality training to bankers in select areas. The training programmes are designed in consultation with the industry experts and human resources personnel with an endeavour to address the skill gaps on a continuous basis.

The regular offerings in varied areas prepare the banking professionals ahead of the impending change. IIBF has state-of-the-art training facilities at its Leadership Center at Mumbai and it has four Professional Development Centers (PDCs) at Mumbai, Delhi, Chennai and Kolkata catering to the increasing demand for the focused training programmes.

## ABOUT THE PROGRAMME

In recent years, the banking industry has experienced substantial changes driven by evolving customer profiles, rapid technological advancements, innovative products, and heightened service expectations. To navigate this dynamic environment, branch managers must possess a specific set of skills that are timely acquired and effectively utilized.

Recognizing this need, the Indian Institute of Banking & Finance (IIBF) has designed a specialized training program for branch managers, focusing on effective branch management and basic credit appraisal.

- **Understanding Branch Management:** Provide a thorough understanding of the roles and responsibilities of a branch manager.
- **Leadership and Management Skills:** Enhance leadership and managerial skills to efficiently manage branch operations.
- **Credit Appraisal Skills:** Introduce the principles of credit appraisal, including financial statement analysis and credit risk assessment.
- **Customer Relationship Management:** Develop strategies for effective customer relationship management and business development.
- **Problem-Solving and Decision-Making:** Improve problem-solving and decision-making abilities in a branch management context.

Thus this program aims to equip participants with the necessary tools and knowledge to manage branch operations efficiently, make informed credit decisions, and contribute to the overall profitability and growth of the bank.

## **OBJECTIVES**

The programme aims at developing understanding among participants about:

- Understand the key responsibilities and roles of a branch manager.
- Develop skills in effective branch management and operations.
- Gain insights into basic credit appraisal and decision-making processes.
- Learn techniques for effective customer relationship management and business development.
- Enhance problem-solving and decision-making skills in branch management.

## **CONTENT OVERVIEW**

- Introduction to Branch Management
- Branch Operations and Administration
- Regulatory and Compliance Frameworks
- Introduction to Credit Principles
- Financial Statement Analysis
- Customer Relationship Management (CRM)
- Handling Customer Complaints and Grievances
- Performance Metrics and Goal Setting

Participants will be equipped with the necessary skills to navigate the evolving banking landscape. They will gain a solid foundation in effective branch management and basic credit appraisal, enabling them to lead their branches towards operational excellence, make sound credit decisions, and drive business growth through superior customer service and relationship management strategies.

## **METHODOLOGY**

- Virtual (Online) interactive lectures, Case Studies, presentations and sharing of experiences on ZOOM.
- Live sessions by Faculties shall be conducted and participants can participate in the sessions from home or office using Laptop/Desktop/iPad/Smart Phones.
- Login details for accessing the sessions shall be shared on registered mail ids of participants 24 hours before the program.

## TARGET GROUP

- Current branch managers
- Aspiring branch managers
- Banking professionals involved in branch operations
- Credit officers and analysts

## DURATION

3 Days - From 24<sup>th</sup> to 26<sup>th</sup> June 2024

Timings: 10.00 A.M. to 05.15 P.M. (First day kindly login by 09.45 am)

## FEES

₹ 6000/- (Six Thousand only) plus GST @18% aggregating to ₹ 7080/- per participant  
(In case of TDS deduction, please send us TDS certificate).

Programme fees may be remitted to the credit of Institute's account as given below:

Beneficiary Name : Indian Institute of Banking and Finance

Name of the Bank Branch : State Bank of India, Vidyavihar (West), Mumbai.

SB Account No : 42895503864

IFSC Code : SBIN0011710

PAN No. : AAATT3309D GSTN No. : 27AAATT3309D1ZS

(Kindly provide your GST Number in the nomination letter to facilitate raising of invoice)

In case of any quires, kindly contact

Mr. Shiv Kumar Gupta	Mr. Shijoy Joseph Vadasery
Zonal Head	Junior Executive
head-pdcwz@iibf.org.in	je.pdcwz1@iibf.org.in
Mob : +91 9555233865	Mob : +91 9820127826
Landline : 022 69437301	Landline : 022 69437302

**\*\* Last Date of Registration is 20<sup>th</sup> June 2024 \*\***



**INDIAN INSTITUTE OF BANKING & FINANCE**  
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**Nomination Form – For Individuals**

Name of the program	: <b>Program on Effective Branch Management with Basic Credit Appraisal</b>
Dates	: <b>24<sup>th</sup> June 2024 (Mon) to 26<sup>th</sup> June 2024 (Wed) – 3 Days</b>
Time	: <b>10.00 a.m. to 5.15 p.m.</b>
Program Type	: <b>Virtual (Online) mode</b>

Nominee Details

Sr. No.	Name	Designation	Mobile No. (WhatsApp)	E-mail	UTR No.
1					

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**\*Login details of the program shall be shared on personal mail id of nominee.**

Fees - ₹ 6000/- (Six Thousand only) plus GST @18% aggregating to ₹ 7080/- per participant  
(In case of TDS deduction, please send us TDS certificate)

Programme fees may be remitted to the credit of Institute's account as given below:	
Beneficiary Name	: Indian Institute of Banking and Finance
Name of the Bank branch	: State Bank of India, VidyaVihar (West), Mumbai.
SB Account No	: 42895503864
IFSC Code	: SBIN0011710
(PAN No: AAATT3309D and GSTIN NO. 27AAATT3309D1ZS)	

In case of any quires, kindly contact

Mr. Shijoy Joseph Vadasery Junior Executive Professional Development Centre – Western Zone - Mumbai Mobile : +91 9820127826 Email : je.pdcwz1@iibf.org.in	Mr. Shiv Kumar Gupta Zonal Head Professional Development Centre – Western Zone - Mumbai Mobile : +91 9555233865 Email : head-pdcwz@iibf.org.in
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**INDIAN INSTITUTE OF BANKING & FINANCE**  
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**Nomination Form – For Banks & FIs**

Name of the program	: <b>Program on Effective Branch Management with Basic Credit Appraisal</b>
Dates	: <b>24<sup>th</sup> June 2024 (Mon) to 26<sup>th</sup> June 2024 (Wed) – 3 Days</b>
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Nominee Details

Sr. No.	Name	Designation	Branch/ Office	Mobile No. (WhatsApp)	E-mail (Personal)	E-mail (Official)
1						
2						

Name of Bank/ FI	:
Address	:
GST Details	:
PAN No.	:
Phone/Mobile of Nominating Official	:
E-Mail of Nominating Official	:

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