



GUJARAT TECHNOLOGICAL UNIVERSITY

Syllabus for Bachelor of Vocation (B.Voc), 5th Semester

Branch: Banking Finance Services and Insurance

Subject Name: CASA Sales Manager

(On-Job-Training)

Subject Code: 1152109

With effective
from academic
year 2020-21

Teaching and Examination Scheme:

Teaching Scheme			Credits	Examination Marks				Total Marks
L	P	OJT		Theory Marks		Practical Marks		
			ESE (E)	PA (M)	ESE (V)	PA (I)		
-	-	15	15	-	-	100	100	200

L- Lectures; P- Practical; OJT- On Job Training; C- Credit; ESE- End Semester Examination; PA- Progressive Assessment

Content:

Sr. No.	Content	Hrs.
1	Identify prospective CASA (Current and savings account) clients : Planning, generating lead and identifying prospective retail and corporate customers for opening CASA	40
2	Manage CASA sales : Approaching prospective customers and converting them to customers for selling CASA and agency products	40
3	Manage client relations and life cycle : Keeping customers updated, following up and ensuring healthy customer relationship management	40
4	Communicate effectively and achieve customer satisfaction : Communicate with BFSI customers, superior and colleagues, Maintain service orientation	40
5	Focus on teamwork : Developing healthy team climate and contributing to building effective team for smooth workflow and target achievement in time	40
	Total	200

Reference:

https://nsdcindia.org/sites/default/files/QP_BSC-Q8404_CASASalesManager_v2-12-sep-2017.pdf