

INCREASE FINANCIAL LITERACY – TTT MODEL

THE CLIENT

2 STRONG PARTNERS:

- A premier Bank in India – leading in Financial Inclusion
- A nonprofit organization – Working for women's financial Inclusion

TARGET AUDIENCE

Designed programs for Bank Correspondents, Branch Champions, BC Supervisors, Call Center

TTT done for Internal Bank Faculty

THE NEED

- To increase financial inclusion of women, and to increase the money saved in accounts
- New and existing Bank Correspondents(BC)/Agents to engage with PMJDY customers, with a focus on women, to build long-term customer relationships, drive behavioral change for their customers, and improve the agent business case
- Project team including branch champions – to engage with PMJDY customers, transition them to the BCs, drive on-ground project implementation and achievement of the project objectives
- Call-center team (out-bound and in-bound) to effectively communicate with the PMJDY women customers, inform them about the new savings scheme, their BC and address their queries

WHAT WE DID - Always – Client First

- Research to understand the participants role and banks expectations
- Content design and facilitator guide prepared for the internal Trainers
- 4 different programs based on participant profile

The Challenges

- TTT approach followed so that internal trainers can deliver the program for the participants
- These trainers are product and process domain expert
- First time they are doing facilitation for the intended participants
- Translations to Multiple Languages

THE INTERVENTION

- TTT done for 5 programs
- Supported the trainers during their first delivery to live audience

THE RESULTS

- Participants found the techniques simple, relevant and applicable
- Internal measurements showed improvement across the BCs sales numbers – both new sign ups and increase in saving habit
- Trainers confident in this facilitative style and would apply to their existing training modules too