

**GOA INSTITUTE OF MANAGEMENT**



*Management Development Programme on*

**MANAGEMENT OF BANKING AND CROSS-SELLING OF INSURANCE & MUTUAL FUNDS**

**(February 19-20, 2021)**



## ABOUT

# MDPs @ GIM

The MDPs at GIM provides an intense and transformative learning experience designed to fit the requirements of seasoned mid-career executives. The programmes will equip the participants with various critical capabilities to succeed in an ever-changing global business environment.

Our programmes are designed and delivered to meet the needs of the executives who have the drive to lead innovations, be the champions of change and have the passion for solving complex business challenges. Our programmes are led and facilitated by experienced faculties who share with the participants their research-driven insights and their knowledge of current industry best practices



## WHY

# THIS PROGRAMME

This programme will help the participants to understand the nuances of management of banking and financial services, especially the deposit and lending function of banks, business communication and customer relationship management as well as the para banking services covering cross-selling of insurance and mutual funds.

# PEDAGOGY

A combination of case studies, experiential exercises, audio-visuals, lectures and experience sharing will be utilized to engage participating managers with the content of the course.



# PROSPECTIVE PARTICIPANTS

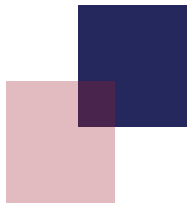
This programme will be appropriate for Junior and Middle-level executives working with payment banks, small finance banks, cooperative banks, commercial banks and NBFCs.



# LAST DATE FOR NOMINATION

In order to finalise the contents and confirmation of speakers, participants need to send their nominations latest by

**January 31, 2021.**



# PROGRAMME COORDINATORS

## **PROF. (DR.) D N PANIGRAHI**

Senior Banker Turned

Professor of Finance & Bank Management

Goa Institute of Management, Goa, India

Email: [dnpanigrahi@gim.ac.in](mailto:dnpanigrahi@gim.ac.in)

Phone (O): +91-832-2366872; (M): +91- 976686

Insurance and Investment Industry Professional(s)  
as Guest Faculty

# Management of Banking and Cross-Selling of Insurance & Mutual Funds

Dates: February 19 – 20, 2021

## Programme Agenda

### Day 1: February 19-2021 (Friday)

Time	Topic	Faculty	Venue
9:30 am - 09:45 am	Registration of the Participants and Introduction		Virtual (Online)
9:45 am - 11:00 am	Changing landscape of Banking and Financial Services Industry and Fundamental Forcers of Change	Prof. D N Panigrahi	
11:15 am - 12:15 pm	Liabilities Management (Deposit Function) and Customer Relationship Management	Prof. D N Panigrahi	
12:30 pm - 01:30 pm	Retail Banking Operations and New Banking Technology and Payment & Settlement System	Prof. D N Panigrahi	
<b>Lunch Break ... Time 01:30 pm – 02:15 pm</b>			
02:15 pm - 03:30 pm	Business communication and Customer relationship Marketing & Management	Guest Faculty	
03:45 am - 05:15 pm	Para banking services covering cross-selling of Life Insurance products	Guest Faculty	

### Day 2: February 20-2021 (Saturday)

Time	Topic	Faculty	Venue
9:30 am - 10:45 am	Para banking services covering cross-selling of General Insurance products	GF	
11:00 am – 12:15 pm	Para banking services covering cross-selling of Mutual Fund products	Prof. DNP	
12.30 pm – 1.30 pm	Managing Bank's Loan Portfolio/Lending Function: Legal Aspects of Bank Lending and Loan Documentation	Prof. DNP	
<b>Lunch Break ... Time 01:30 pm – 02:15 pm</b>			
2.15 pm - 3:30 pm	Credit Assessment – Fund based Limits/Techniques of Working Capital Appraisal/Assessment; Bill Financing: Demand Bills Purchased (DBP) & Usance Bills Discounted (UBD)	Prof. DNP	
03:45 pm - 05:00 pm	Appraisal of a Home Loan and Car Loan Proposal – Method of Assessment of Loan Eligibility, Loan Appraisal Techinques, Documentation and Follow up	Prof. DNP	

# REGISTRATION FORM

## MANAGEMENT DEVELOPMENT PROGRAM

### (MANAGEMENT OF BANKING AND CROSS-SELLING OF INSURANCE & MUTUAL FUNDS

**(February 19-20, 2021)**

Goa Institute of Management, Goa (Virtual/Online Mode)

Please fill the form and email to ([dnpanigrahi@gim.ac.in](mailto:dnpanigrahi@gim.ac.in))

Name: \_\_\_\_\_

*(Kindly note, the above mentioned name will be printed on the certificate)*

Male:  Female:  Date of Birth: \_\_\_\_\_

Designation: \_\_\_\_\_

Department: \_\_\_\_\_

Company Name: \_\_\_\_\_

Work Experience (years): \_\_\_\_\_

Communication Address: \_\_\_\_\_

Phone / Mobile number: \_\_\_\_\_

Email ID: \_\_\_\_\_

To whom do you Directly Report to? \_\_\_\_\_

How many employees report to you? \_\_\_\_\_

Expectations from the Programme: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Signature:

Date:

## COURSE FEE

- Rs.3,000/- per participant (for 2 days). 18% GST extra
- The course fee covers Soft Copy of materials
- The registration fees are received through NEFT/IMPS.

Following are the bank details:

Bank Account Number: **23611450000016**

Beneficiary Name: Goa Institute of Management

Bank Name: HDFC Bank (Sanquelim Branch)

IFSC Code: **HDFC0002361**

Account Type: Savings Account

