



SANDIP UNIVERSITY

SCHOOL OF COMMERCE AND MANAGEMENT STUDIES

CERTIFICATE PROGRAM IN BANKING, FINANCE AND INSURANCE [CPBFI] (CERTIFICATION COURSE CLASSES)

[Event under MOU with Bajaj Finserv]

Our college Sandip university [school of commerce and management studies], Nashik had organized a CPBFI [certificate programme in banking, finance, and insurance] course for final year students of BBA IV Sem & BBA BA IV Sem in order to make them prepared before entering the steps into the industrial world. 96 students registered themselves in this course.

The main objective of this course is to make graduates employable for banking, financial services and insurance industry. CPBFI is 100 hours training program which is conducted by pool of trainers with extensive training experience. Bajaj Finserv Ltd. joined hand with a leading management school in India to build Certificate Programme in Banking, Finance and Insurance (CPBFI). The curriculum has a good mix of domain knowledge and soft skills ranging from subjects like banking operations, insurance management, advanced business communications, which make students more confident to appear in for the interview in future.

The Certificate Programme in Banking, Finance and Insurance was structured having a strong assessment criterion which includes minimum 75% attendance and minimum 50% score in online assessment without which a student will not qualify for the certificate.

It includes 4 courses: -

- Overview of insurance [12 hours]
- Overview of retail banking [36 hours]
- Managing self [24 hours]
- Communication and workplace skills [24 hours]

There were almost 96 students who were enrolled in this course. These are further divided into:

- **BATCH 1** [48 students] with student coordinator: -

1. **Aashutosh Sharma**
2. **Dikshita Bhalerao**



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- **BATCH 2** [48 students] with the student coordinator: -
 1. **Priti Nikshe**
 2. **Adarsh Kharel**
- CPBFI College coordinator was **Mrs. Madhuri Tambe.**

The lecture was held for 3 hours per day from Monday to Friday per week. The students were divided into 2 batches. So, batch-1 session was started with overview of insurance and for batch-2 started with banking for whole one week and thereby these sessions were scheduled accordingly one by one for both the batches.

A Pre-Assessment Quiz was conducted on 04/02/2025 to assess the student's level of awareness about financial service industry before the start of the programme. The program was launched on 07/02/2025 virtually.

The Banking classes were engaged by Mr.Mahesh Lathe who explained every topic clearly which lead learner to analyze the content. The classes were of great help to students who are planning a career in the field of banking.

The insurance and finance classes were conducted by Mrs.Kavita Bhanange who taught students through his life experience. She shared interesting and valuable experience which she had with his clients as well as fellow colleagues and showed how the life of an insurance agent truly is. Students understood the benefits of being an insurance agent and also the need to have an insurance policy for oneself.

Communication and Work Skills sessions were conducted by Sanjana Tikekar mam for batch 1 and for batch 2 Mr.Kumud. They covered various topics which helped enhance their communication and interactive skills. Apart from this, group projects and assignments were given and also conducted mock interviews. Group discussions were taken and a lot of interesting activities were conducted. It helps the students to boost their confidence in order to crack interviews.

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On April 1st 2025 for batch 1 and batch 2, all the participants were given a time slot to attend online mock interview with judges appointed by Bajaj Finserv which was an amazing experience for the students.

The feedback on student's performance was reported to the course coordinator by the learning partner with all details regarding attendance and performance in examination with regard to all students.

On the whole, all the classes that were held during the 100 hours of teaching- learning were indeed very useful to all students regardless of their future carrier plans. Finally, all the students had a post assessment quiz on 24/03/2025 which showed an obvious improvement in their scores.

In the batch students from the Department of Commerce and Business Administration enrolled for this programme and of them successfully qualified for the certificate. Students for HRW Star performance and students for HRW participation certificate.



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Pre-assessment test



Batch launch event



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Classes conducted under Bajaj Fiserv





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HR WORKSHOP - INTERVIEW ASSESSMENT FORM

Name: <u>Pooja</u>		Date of Interview: <u>01.04.2025</u>
Location:		Position Applied for:

Rating scale: 1-Considerable improvement required
3-Absent there! 2-Moderate improvement required
4-Remarkable

Parameters	Rating (1-4) & Remarks	Subject Score
1. Functional Knowledge: Has relevant and appropriate functional knowledge. Banking concept: Retail Assets & Liabilities products, KYC and UWF Life Insurance & General Insurance-Concept of Risk & Insurance, Retail products, Channels & etc.	2	2
2. Communication Skills: Ability to communicate clearly & confidently. Ability to express ideas logically & sequentially. Listens attentively & demonstrates comprehension Understands and speaks basic English.	3	3
3. Collaboration: Team Player-Exhibits different aspects of coordination, cooperation and collaboration.	2	2
4. Overall Personality and disposition: Body language, appearance and conduct, Eye contact, enthusiasm/energy level Honesty/integrity-Displays integrity between words and action & respect for rules. Commitment level-Displays conviction towards task accomplishment.	3	3
5. Educational Background: Academic background - (Curricular and extra-curricular).	2	3
6. IT skills: Conversant with office and mail applications. Can comfortably use smart phones and/or handheld devices. Awareness of data security aspects.	2	2
7. Adaptability and flexibility: Open for working at different locations and/or in different industries & roles.	3	3

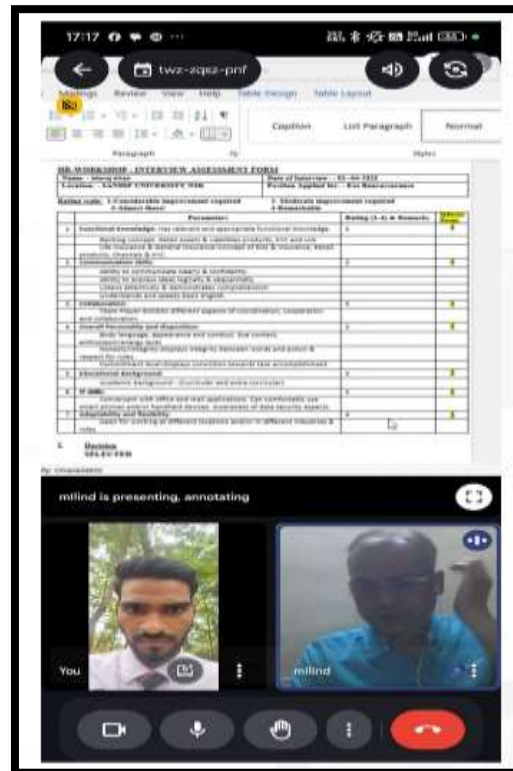
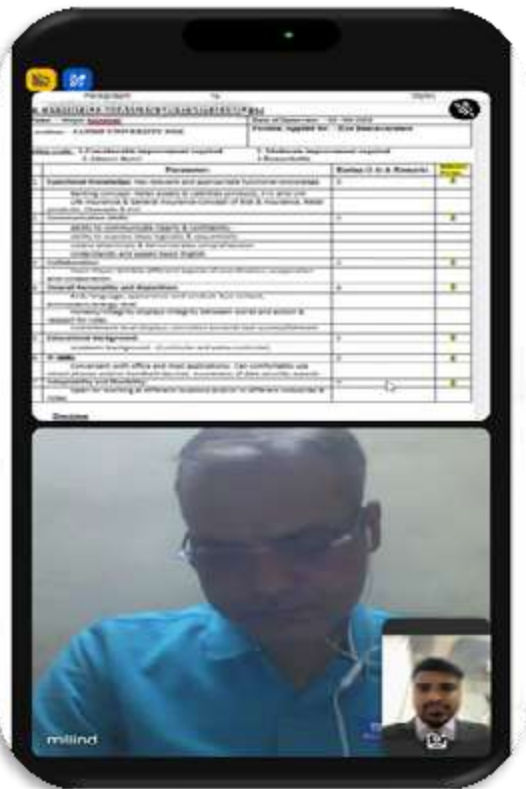
I. Decision: Selected

II. Remarks:

I. Mohan is presenting, annotating

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HRW Interview



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ASSESSMENT OF HR INTERVIEWS

HR-WORKSHOP - INTERVIEW ASSESSMENT FORM

Name: Anuman.Charudatta.Bhamare	Date of Interview: 01/04/2024
Location: Maharashtra	Position Applied for: other

Rating scale: 1-Considerable improvement required 2-Moderate improvement required
3-Almost there! 4-Remarkable

	Parameters	Rating (1-4) & Remarks	Industry Norms
1.	Functional Knowledge: Has relevant and appropriate functional knowledge.	3	2
	Banking concept- Retail Assets & Liabilities products, KYC and UW		
	Life Insurance & General Insurance-Concept of Risk & Insurance, Retail products, Channels & KYC.		
2.	Communication Skills:	2	3
	Ability to communicate clearly & Confidently.		
	Ability to express ideas logically & sequentially.		
	Listens attentively & demonstrates comprehension		
	Understands and speaks basic English.		
3.	Collaboration:	2	2
	Team Player-Exhibits different aspects of coordination, cooperation and collaboration.		
4.	Overall Personality and disposition:	3	3
	Body language, appearance and conduct. Eye contact, enthusiasm/energy level		
	Honesty/Integrity-Displays integrity between words and action & respect for rules.		
	Commitment level-Displays conviction towards task accomplishment.		
5.	Educational Background:	2	3
	Academic background - (Curricular and extra-curricular).		
6.	IT skills:	2	2
	Conversant with office and mail applications. Can comfortably use smart phones and/or handheld devices. Awareness of data security aspects.		
7.	Adaptability and flexibility:	1	3
	Open for working at different locations and/or in different industries & roles.		

SELECTED

I.	Remarks:	
1.		
2.		
3.		

IV. Other Details:

Expected CTC:	Earliest Date of joining:
Willingness to re-locate:	

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HR-WORKSHOP - INTERVIEW ASSESSMENT FORM

Name: Pranjali Sachin Kumawat	Date of Interview: 1 st April 2025
Location: - Sandip University	Position Applied for: Rel. Officer- CASA

Rating scale: 1-Considerable improvement required 2- Moderate improvement required

3-Almost there!

4-Remarkable

	Parameters	Rating (1-4) & Remarks	Industry Norms
1.	Functional Knowledge: Has relevant and appropriate functional knowledge.	1	2
	Banking concept- Retail Assets & Liabilities products, KYC and UW		
	Life Insurance & General Insurance- Concept of Risk & Insurance, Retail products, Channels & KYC.		
2.	Communication Skills:	4	3
	Ability to communicate clearly & Confidently.		
	Ability to express ideas logically & sequentially.		
	Listens attentively & demonstrates comprehension		
	Understands and speaks basic English.		

3.	Collaboration:	3	2
	Team Player-Exhibits different aspects of coordination, cooperation and collaboration.		
4.	Overall Personality and disposition:	4	3
	Body language, appearance and conduct. Eye contact, enthusiasm/energy level		
	Honesty/Integrity-Displays integrity between words and action & respect for rules.		
	Commitment level-Displays conviction towards task accomplishment.		
5.	Educational Background:	3	3
	Academic background - (Curricular and extra-curricular).		
6.	IT skills:	2	2
	Conversant with office and mail applications. Can comfortably use smart phones and/or handheld devices. Awareness of data security aspects.		
7.	Adaptability and flexibility:	4	3
	Open for working at different locations and/or in different industries & roles.		

I. Decision: *Selected*

II. Remarks:

1	
2	

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Prasoon chaturvedi (Presenting, annotating)

HR-WORKSHOP - INTERVIEW ASSESSMENT FORM

Name: Pranjal Sachin Kumarwat	Date of Interview: 1 st April 2025
Location: Sandip University	Position Applied for: Rel. Officer- CASA

Rating scale: 1-Considerable improvement required
3-Almost there! 2-Moderate improvement required 4-Remarkable


Parameters	Rating (1-4) & Remarks	Initials
1. Functional Knowledge: Has relevant and appropriate functional knowledge. Banking concept: Retail Assets & Liabilities products, KYC and UW Life Insurance & General Insurance- Concept of Risk & Insurance, Retail products, Channels & KYC.	1	
2. Communication Skills: Ability to communicate clearly & Confidently. Ability to express ideas logically & sequentially. Listens attentively & demonstrates comprehension Understands and speaks basic English.	4	

3. Collaboration: Team Player-Exhibits different aspects of coordination, cooperation and collaboration.	3	
4. Overall Personality and disposition: Body language, appearance and conduct. Eye contact, enthusiasm/energy level Honesty/Integrity-Displays integrity between words and action & respect for rules. Commitment level-Displays conviction towards task accomplishment.	4	
5. Educational Background: Academic background - (Curricular and extra-curricular).	3	
6. IT skills: Conversant with office and mail applications. Can comfortably use smart phones and/or handheld devices. Awareness of data security aspects.	2	
7. Adaptability and flexibility: Open for working at different locations and/or in different industries & roles.	4	


I. Decision: **Selected**

II. Remarks:

1
2
3



Prasoon chaturvedi



Pranjal Kumarwat

59 PM | wpg-xkje-xcs

Face effects
Background effect
Auto framing
Pause

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Outcome of the CPBFI Certification Program Report

The Certificate Program in Banking, Finance, and Insurance (CPBFI) conducted at Sandip University, Nashik, under the MOU with Bajaj Finserv, successfully equipped 96 final-year BBA students with industry-relevant knowledge and skills. The structured 100-hour training program, covering banking, insurance, finance, and communication skills, yielded several positive outcomes:

1. Improved Industry Readiness:

- Students gained in-depth knowledge of banking operations, insurance management, and financial services, making them better prepared for job opportunities in the BFSI sector.
- Real-world case studies and insights from experienced trainers enhanced students' analytical and decision-making skills.

2. Skill Development & Practical Exposure:

- Mock interviews, group discussions, and interactive activities helped improve students' confidence and communication skills.
- Pre- and post-assessment quizzes indicated a significant improvement in students' understanding of financial concepts.
- The interactive teaching approach made complex financial concepts easier to grasp.

3. Hands-On Experience with HR Interviews:

- On April 1, 2025, all students participated in an online mock interview conducted by Bajaj Finserv.
- The feedback from HR professionals helped students identify their strengths and areas for improvement in interview performance.

4. Certification & Recognition:

- Students who met the assessment criteria (minimum 75% attendance and 50% score in online exams) successfully qualified for the CPBFI certificate.
- Outstanding students were recognized with HRW Star Performance awards and HRW Participation Certificates.

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5. Learning Experience:

- The sessions helped students develop financial literacy, professional communication, and workplace skills essential for career growth.
- The peer learning environment encouraged teamwork, leadership, and practical problem-solving abilities.

Mrs.Madhuri Tambe
CPBFI College Coordinator

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