



GOVERNMENT OF INDIA  
MINISTRY OF SKILL DEVELOPMENT & ENTREPRENEURSHIP  
DIRECTORATE GENERAL OF TRAINING

**COMPETENCY BASED CURRICULUM**

# **FINTECH SALES EXECUTIVE**

(Duration: Six Months)

**CRAFTSMEN TRAINING SCHEME (CTS)**

**(Flexi MoU)**

**NSQF LEVEL- 3**



**SECTOR – BANKING FINANCIAL SERVICES & INSURANCE  
(BFSI)**



# FINTECH SALES EXECUTIVE

(Non-Engineering Trade)

(Designed in 2022)

Version: 1.0

**CRAFTSMEN TRAINING SCHEME (CTS)**

**(Flexi MoU)**

**NSQF LEVEL - 3**

**Skill India**  
कौशल भारत - कुशल भारत

Developed By  
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**CONTENTS**

| <b>S No.</b> | <b>Topics</b>                                     | <b>Page No.</b> |
|--------------|---|-----------------|
| 1.           | Course Information                                | 1               |
| 2.           | Training System                                   | 2-5             |
| 3.           | Job Role  | 6               |
| 4.           | General Information                               | 7               |
| 5.           | NSQF Level Compliance                             | 8               |
| 6.           | Learning Outcome                                  | 9               |
| 7.           | Assessment Criteria                               | 10-11           |
| 8.           | Syllabus  | 12-21           |
| 9.           | Annexure I  |                 |
|              | List of Trade Tools & Equipment                   | 22-23           |
|              | List of Tools & Equipment for Employability Skill | 24              |
| 10.          | Annexure II - Format for Internal Assessment      | 25              |

## 1. COURSE INFORMATION

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During the six months, of Fintech Sales Executive trade a candidate will be trained on professional skill, professional knowledge and Employability skill related to job role. A Program is a 6-month Program that aims to train young individuals to build careers in the FinTech Industry and is ideal for anyone who want to get entry into the BFSI sector.

During the 6-month course duration the candidate will build knowledge in Fintech Ecosystem & Market & it's Business Application for Merchants (Products), the basic financial terms used & are trained on knowledge & skills to enhance his or her Employability skill related to the job role.

The Program is a mix of Instructor led theory learning, self-administered learning, project work & on-the-job training to build confidence & hands-on skills. The broad components covered are: -

1. Overview of Fintech Industry
2. Its application in Business i.e. FinTech Products
3. B2B Sales understanding & internet commerce (sales) skills.

Along with theory learning the candidate will gather hands-on experience on – selling products & working in a B2B environment. The trainee learns how modern technology is digitizing financial needs of Merchants with its products & facilitating Business needs of the market & will also learn about the top innovations in this space, The trainee is made aware about the career opportunities available for them at entry level and what different job positions they can hold after joining the particular concern. At the end of the course, every trainee has to clear the prescribed assessments, have full training & field attendance, submit a project work as applicable.

## 2. TRAINING SYSTEM

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### 2.1 GENERAL

The Directorate General of Training (DGT) under Ministry of Skill Development & Entrepreneurship offers a range of vocational training courses catering to the need of different sectors of economy/ Labour market. The vocational training programmes are delivered under the aegis of Directorate General of Training (DGT). Under the Flexi MOU scheme offer, DGT & Paytm offer to pioneer Fintech Skill Building & strengthening of vocational training. “Fintech Sales Professional” trade under Flexi MOU scheme is a course, which will be delivered nationwide. The course is of 6 months duration. It mainly consists of Domain area and Core area.

One97 Communication Pvt. Ltd. (Paytm) shall conduct courses pan-India locations leveraging the facilities and services available at ITIs, regional training centers, training centers of training partners, vendors and dealers associated with Paytm. Paytm will ensure that not less than 50% of trainees are placed with Paytm or its business partners for not less than six month duration. It will also ensure the eligible trainees take up Apprenticeship / higher education in suitable streams and shall also guide the students to become Entrepreneurs. Paytm will strictly follow the policy guidelines for Flexi - MoU as in place from time to time. No deviation for the same would be permitted. Every Alternate Month Admission and Exam for trades run under Flexi MoU at training locations of Paytm. Theory content to be 30% and practical content to be 70%.

#### **Broadly candidates need to demonstrate that they are able to:**

- Understand & apply learnt knowledge
- Organize work processes, identify necessary resources to deliver
- Perform tasks with due consideration of compliance rules, fraud prevention regulations and other stipulations
- Apply professional skill, knowledge & employability skills while performing jobs.
- Document & pass assessments related to task undertaken

### 2.2 PROGRESSION PATHWAYS

- Can join industry as Sales/ Business Executive with a scope to progress further as Senior Executive, Supervisor and can rise up to the level of Manager.
- Can become Entrepreneur in the related field.
- Can join Apprenticeship programs in different types of industries leading to a National Apprenticeship certificate (NAC).
- Can join Advanced Diploma (Vocational) courses under DGT as applicable

## 2.3 COURSE STRUCTURE

Table below depicts the distribution of training hours across various course elements during a period of 6 months

| S No | Course Element  | National Training Hours |
|------|---|-------------------------|
| 1    | Professional Skill<br>(Trade Practical + On the job training) | 600                     |
| 2    | Professional Knowledge (Trade Theory)                         | 120                     |
|      | Employability Skills  | 60                      |
|      | <b>TOTAL</b>  | <b>780</b>              |

## 2.4 ASSESSMENT & CERTIFICATION

- I. Conducting training of selected candidates is the sole responsibility of Industrial Training Partner (ITP).
- II. Assessment will be jointly done by ITP and DGT. Practical and formative assessment shall be conducted by ITP, and Computer Based theoretical exams shall be conducted by DGT.
- III. ITP must refer to the latest examination reform guidelines issued by DGT dated 4<sup>th</sup> October 2018 any changes or revisions to the same shall be applicable to flexi-MoU scheme.
- IV. Maximum attempts for clearing the exam and obtaining NTC shall be in line with CTS.
- V. For practical examination and formative assessment, ITP has been given flexibility to design the questions, assess the candidates and upload their marks in the scheme portal.
- VI. ITP shall develop a comprehensive Question Bank (in English and Hindi) of minimum 1000 questions, grouped by chapters and difficulty level. The same shall be vetted by NIMI experts and then be handed over to DGT for conducting theory exams. DGT may add some questions to the same before conducting actual exams.
- VII. Theoretical exams shall be conducted by DGT in Computer Based Test format. Upon completion of course and payment of requisite examination fee by ITP, admit cards shall be generated by scheme portal.
- VIII. DGT shall arrange for conduct of computer based theory exam at designated examination centres & certify the successful trainees with e-NTC under flexi-MoU scheme with mention of ITP name in the Certificate.
- IX. Students, who have successfully appeared in the final exam after completion of course, are eligible to register as apprentices.

The trainee will be tested for his skill, knowledge and attitude during the period of the course and at the end of the training program as notified by the Government of India (GoI) from time to time. The employability skills will be tested in the first year itself.

The **Internal Assessment** during the period of training will be done by **Formative Assessment Method** by testing for assessment criteria listed against learning outcomes. The training institute has to maintain an individual trainee portfolio as detailed in assessment guideline. The marks of internal assessment will be as per the template (Annexure –II).

**The learning outcome and assessment criteria will be the basis for setting question papers for final assessment. The examiner during final examination will also check** the individual trainee's profile as detailed in assessment guideline before giving marks for practical examination.

### 2.4.1 PASS REGULATION

The minimum pass percentage for practical is 60% & minimum pass percentage of theory subjects is 33%.

### 2.4.2 ASSESSMENT GUIDELINE

Appropriate arrangements should be made to ensure that there will be no artificial barriers to assessment. The nature of special needs should be taken into account while undertaking the assessment. Due consideration should be given while assessing for teamwork, avoidance/reduction of scrap/wastage and disposal of scrap/waste as per procedure, behavioral attitude, sensitivity to the environment and regularity in training. The sensitivity towards OSHE and self-learning attitude are to be considered while assessing competency.

Assessment will be evidence based comprising the following:

- Job carried out in labs/workshop
- Record book/ daily diary
- Answer sheet of assessment
- Viva-voce
- Progress chart
- Attendance and punctuality
- Assignment
- Project work

Evidences and records of internal (Formative) assessments are to be preserved until forthcoming examination for audit and verification by examining body. The following marking pattern to be adopted while assessing:

| Performance Level  | Evidence                                    |
|--|---|
| (a) Weightage in the range of 60%-75% to be allotted during assessment |   |
| For performance in this grade, the candidate                           | • Demonstration of good skill in the use of |

|   |  |
|---|--|
| <p>should produce work which demonstrates attainment of an acceptable standard of craftsmanship with occasional guidance, and due regard for safety procedures and practices</p>  | <p>hand tools, machine tools and workshop equipment.</p> <ul style="list-style-type: none"> <li>• 60-70% accuracy achieved while undertaking different work with those demanded by the component/job.</li> <li>• A fairly good level of neatness and consistency in the finish.</li> <li>• Occasional support in completing the project/job.</li> </ul>                                |
| <p><b>(b) Weightage in the range of 75%-90% to be allotted during assessment</b></p>  |  |
| <p>For this grade, a candidate should produce work which demonstrates attainment of a reasonable standard of craftsmanship, with little guidance, and regard for safety procedures and practices</p>  | <ul style="list-style-type: none"> <li>• Good skill levels in the use of hand tools, machine tools and workshop equipment.</li> <li>• 70-80% accuracy achieved while undertaking different work with those demanded by the component/job.</li> <li>• A good level of neatness and consistency in the finish.</li> <li>• Little support in completing the project/job.</li> </ul>       |
| <p><b>(c) Weightage in the range of more than 90% to be allotted during assessment</b></p>  |  |
| <p>For performance in this grade, the candidate, with minimal or no support in organization and execution and with due regard for safety procedures and practices, has produced work which demonstrates attainment of a high standard of craftsmanship.</p> | <ul style="list-style-type: none"> <li>• High skill levels in the use of hand tools, machine tools and workshop equipment.</li> <li>• Above 80% accuracy achieved while undertaking different work with those demanded by the component/job.</li> <li>• A high level of neatness and consistency in the finish.</li> <li>• Minimal or no support in completing the project.</li> </ul> |



### 3. JOB ROLE

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Fintech Sales Executive will be able to perform variety of tasks in a Business to Business (B2B) Market Environment viz.

- Dealing with Merchants & internal sales & support team for task accomplishment
- Operations in B2B sales environment & internal stakeholder management
- Troubleshooting of Business Products/ Machines
- Performing basic operations of sales & MIS reporting.
- Preparing feedback report.
- The individuals will interact with customers in field assisted with standard script & product knowledge. They answer inquiries, resolve problems, record complaints and/or receive feedback. Individuals at this job are responsible for resolving queries and customer cases in person. They form the primary layer of contact with the customer and responses may be pre-existing formats.

**Marketing Manager – Line of Business;** is responsible for developing and maintaining marketing strategies to meet agreed company objectives and evaluate customer research, market conditions, competitor's data and implement marketing plan alterations as needed.

**Sales Executive;** is responsible for supporting sales to generate sales leads (telemarketing activities) and also support overall sales process to support both sales and service activities.

#### Reference NCO-2015:

- a) 3322.1701 - Marketing Manager – Line of Business
- b) 5211.0301 - Sales Executive-Dealership

## 4. GENERAL INFORMATION

|   |   |
|---|---|
| <b>Name of the Trade</b>                | <b>Fintech Sales Executive (Flexi MoU)</b>  |
| <b>Qualification Code</b>               | DGT/7019  |
| <b>NCO - 2015</b>                       | 3322.1701, 5211.0301  |
| <b>NSQF Level</b>                       | LEVEL - 3   |
| <b>Duration of Craftsmen Training</b>   | Six Months (780 Hours)  |
| <b>Entry Qualification</b>              | Passed 10 <sup>th</sup> Class Examination, possessing a smart phone to attend classes & complete tasks assigned   |
| <b>Minimum Age</b>                      | 16 years as on first day of academic session.   |
| <b>Unit Strength (No. Of Student)</b>   | 30  |
| <b>Space Norms</b>                      | 60 sq. m  |
| <b>Power Norms</b>                      | 5 KW  |
| <b>Instructors Qualification for</b>    |   |
| <b>1. Fintech Sales Executive Trade</b> | Minimum Graduate with 2-8 years of experience in sales/ customer service/ training role in Fintech domain or relevant domain<br><b>Essential Qualification:</b><br>Relevant Train the trainer certified   |
| <b>2. Employability Skill</b>           | MBA/ BBA / Any Graduate/ Diploma in any discipline with Two years' experience with <b>short term ToT Course in Employability Skills</b> from DGT institutes.<br>(Must have studied English/ Communication Skills and Basic Computer at 12th / Diploma level and above)<br><b>OR</b><br><b>Existing Social Studies Instructors in ITIs with short term ToT Course in Employability Skills</b> from DGT institutes. |
| <b>5. Minimum Age for Instructor</b>    | 21 Years  |
| <b>List of Tools and Equipment</b>      | As per Annexure – I   |

## 5. NSQF LEVEL COMPLIANCE

NSQF level **Fintech Sales Executive** trade under CTS (**Flexi MoU**): **Level -3**.

As per notification issued by Govt. of India dated- 27.12.2013 on National Skill Qualification Framework total 10 (Ten) Levels are defined.

Each level of the NSQF is associated with a set of descriptors made up of five outcome statements, which describe in general terms, the minimum knowledge, skills and attributes that a learner needs to acquire in order to be certified for that level.

Each level of the NSQF is described by a statement of learning outcomes in five domains, known as level descriptors. These five domains are:

- a. Process
- b. Professional Knowledge
- c. Professional Skill
- d. Core Skill
- e. Responsibility

The broad learning outcome of **Fintech Sales Executive** trade under CTS (**Flexi MoU**) mostly matches with the Level descriptor at Level- 3.

The NSQF Level-3 descriptor is given below:

| Level   | Process Required   | Professional Knowledge  | Professional Skills   | Core Skills  | Responsibility  |
|---------|--|---|---|--|---|
| Level 3 | person may carry out a job which may require limited range of activities routine and predictable | Basic facts, process and principle applied in trade of employment | recall and demonstrate practical skill, routine and repetitive in narrow range of application | Communication written and oral, with minimum required clarity, skill of basic arithmetic and algebraic principles, personal banking, basic understanding of social and natural environment | Under close supervision<br>Some Responsibility for own work within defined limit. |

## 6. LEARNING OUTCOME

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*Learning outcomes are a reflection of total competencies of a trainee and assessment will be carried out as per the assessment criteria.*

### 6.1 SPECIFIC LEARNING OUTCOMES

1. Familiarise with Fintech Ecosystem, Products and their value addition to the Merchant & to the ecosystem.
2. Identify, select and apply the key terms, theories/concepts and practices within the field of FinTech.
3. Explain Fintech Product in details & its Sales, Operations & Troubleshooting.
4. Develop & Apply Sales Skills in actual B2B Fintech Market.
5. Display competence for effective communication with prospective clients/ sales environment and display professional grooming & presentation.
6. Deal with Merchant remotely & learn Merchant revisiting.
7. Apply a range of recognized time management techniques.

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## 7. LEARNING OUTCOME WITH ASSESSMENT CRITERIA

| SPECIFIC LEARNING OUTCOMES  |   |
|---|---|
| LEARNING OUTCOMES   | ASSESSMENT CRITERIA   |
| 1 Familiarise with Fintech Ecosystem, Products and their value addition to the Merchant & to the ecosystem.                                   | <ul style="list-style-type: none"> <li>• Explain BFSI Sector &amp; the overview of Fintech Innovation</li> <li>• Explain meaning, nature of products, Merchant ecosystem &amp; legal framework of sales.</li> </ul>   |
| 2 Identify, select and apply the key terms, theories/ concepts and practices within the field of FinTech.                                     | <ul style="list-style-type: none"> <li>• Performance on Formative assessments on MCQ &amp; applicative type of questions.</li> <li>• Performance in Trivia by the mentor at work.</li> <li>• Demonstrates the use of Industry glossary in the right context</li> </ul>  |
| 3 Explain Fintech Product in details & its Sales, Operations & Troubleshooting.   | <ul style="list-style-type: none"> <li>• Understand &amp; explain different Fintech Products</li> <li>• Explain the process of Merchant on boarding</li> <li>• Explain the types &amp; process of troubleshooting</li> <li>• Learn Sales pitch for Fin-Tech Product</li> </ul>  |
| 4 Develop & Apply Sales Skills in actual B2B Fintech Market.  | <ul style="list-style-type: none"> <li>• Ability to connect with Merchant to determine need &amp; sell a product</li> <li>• Ability to explain &amp; demonstrate Product gestures &amp; value addition to Merchant</li> <li>• Theory knowledge of the Product</li> <li>• Understanding of how sales plans &amp; offers work</li> <li>• Ability to map product features with needs of the customer to make a sale</li> <li>• Learn Customer profiling</li> <li>• Demonstrate Field Sales Skills</li> </ul>   |
| 5 Display competence in effective communication with prospective clients/ sales environment and display professional grooming & presentation. | <ul style="list-style-type: none"> <li>• Exhibits Professional grooming etiquette &amp; self-presentation</li> <li>• Exhibits ability to present the product effectively highlighting its features</li> <li>• Explore Scope and Career pursuit of Business development and process.</li> <li>• establish contact with customers, following the organization's procedures</li> <li>• initiate conversation i.e. introduce and explain the purpose of the visit, following standard scripts</li> <li>• obtain information from customers to identify their needs</li> <li>• make convincing sales pitches to customers following</li> </ul> |

|   |  |
|---|--|
|   | <p>standard scripts</p> <ul style="list-style-type: none"> <li>• handle customer queries, objections and rebuttals following standard scripts</li> <li>• adapt the approach and style to customer preferences, within the limits of competence and authority</li> <li>• refer issues outside the area of competence and authority to supervisors, following the organization's procedures</li> <li>• identify and act on opportunities to up-sell or cross-sell other products/ services to customers</li> <li>• confirm customer wishes and needs in order to close sales</li> <li>• obtain required financial information from customers, following the organizational procedures</li> <li>• complete the organization's post-sales procedures in order to complete sales</li> <li>• comply with relevant standards, policies, procedures and guidelines when making outbound telesales calls</li> </ul>     |
| <p>6 Deal with Merchant remotely &amp; learn Merchant revisiting.</p> | <ul style="list-style-type: none"> <li>• greet customers and verify their details, following organizational procedures</li> <li>• summarize, and obtain customer confirmation regarding understanding of queries</li> <li>• express concern for any difficulties caused and show commitment to resolve queries</li> <li>• record and categorize queries accurately using organization's query management tool</li> <li>• refer queries outside the area of competence or authority promptly to supervisor</li> <li>• access the knowledge base of the organization for solutions to queries, where available</li> <li>• resolve queries within the area of competence or authority in line with organizational guidelines</li> <li>• obtain advice and guidance from superiors, where necessary</li> <li>• obtain confirmation from customers that queries have been resolved to their satisfaction</li> </ul> |
| <p>7 Apply a range of recognized time management techniques.</p>      | <ul style="list-style-type: none"> <li>• Training attendance</li> <li>• Adherence to training course curriculum &amp; assignments along with overall on the job assignment</li> <li>• Ability to organise resources to meet end objective</li> </ul>   |

| SYLLABUS – FINTECH SALES EXECUTIVE                  |   |   |  |
|---|---|---|--|
| FIRST YEAR  |   |   |  |
| Week No.  | Reference Learning Outcome  | Professional Skills (Trade Practical)   | Professional Knowledge (Trade Theory)  |
| Professional Skill – 30 hours<br>Theory – 6 hours   | Familiarise with Fintech Ecosystem, Products and their value addition to the Merchant & to the ecosystem. | <ul style="list-style-type: none"> <li>Understand &amp; explain the Paytm Business App &amp; how it helps Merchants, demonstrate its different Products &amp; demonstrate working of all product applications. (15 hours)</li> <li>Explain the features of all products &amp; all in one QR code. (15 hours)</li> </ul> | <ul style="list-style-type: none"> <li>Discuss features of Paytm Business App &amp; how it helps Merchants. (2 hours)</li> <li>Understand &amp; distinguish the key Fintech products for Merchants - EDC, QR, Sound Box, Loans, Fastag. (2 hours)</li> <li>Simulate &amp; learn via app tour for all applications &amp; all in one QR code &amp; Paytm Wallet overview. (2 hours)</li> </ul> |
| Professional Skill - 30 hours<br>Theory - 6 hours   | Identify, select and apply the key terms, theories/concepts and practices within the field of FinTech.    | <ul style="list-style-type: none"> <li>Demonstrate the understanding of key terms, abbreviations &amp; concepts &amp; illustrate its application. (30 hours)</li> </ul>   | <ul style="list-style-type: none"> <li>Understand the overview of BFSI Sector, Fintech overview &amp; Value chain, Digital Payments &amp; what is UPI, Wallet etc., Security. (3 hours)</li> <li>Learn about Paytm - History, Market standing, Made in India, Safety &amp; Security. (3 hours))</li> <li>Learn Product related terms/ glossary (30 minutes)</li> </ul>                       |
| Professional Skill – 120 hours<br>Theory - 24 hours | Explain Fintech Product in details & its Sales, Operations & Troubleshooting.                             | <p><b>Product 1 – All in one QR code (30 hours)</b></p> <ul style="list-style-type: none"> <li>Illustrate the use, features &amp; working of the QR code</li> <li>Ability to demonstrate its effectiveness from competitive features &amp; pricing point of view to the Merchant needs</li> </ul>                       | <p><b>Product 1 – All in one QR code (06 hours)</b></p> <ul style="list-style-type: none"> <li>QR Benefits to the Merchants</li> <li>Customer Offers/ Pricing plans</li> <li>Sales Pitch for QR</li> <li>New innovations</li> <li>What is All in one QR code &amp; How to map the “All in One QR code” to merchant’s account</li> </ul>  |

|  |  |  |   |
|--|--|--|---|
|  |  | <ul style="list-style-type: none"> <li>• Demonstrate its working &amp; application for routine Business Operations need of the Merchant</li> <li>• Demonstrate the process of how to map All in One QR code to merchant's account</li> <li>• Demonstration of effectively procuring Merchandising material as per guidelines</li> <li>• Apply different sales &amp; upselling techniques &amp; handle related objections</li> <li>• Follow day-to-day operations to support field sales process.</li> </ul> <p><b>Product 2 – EDC (30 hours)</b></p> <ul style="list-style-type: none"> <li>• Illustrate the use, features &amp; working of the EDC Machine code</li> <li>• Ability to demonstrate its effectiveness from competitive features &amp; pricing point of view to the Merchant needs</li> <li>• Demonstrate its working &amp; application for routine Business Operations need of the Merchant</li> <li>• Demonstrate the process of validate a Business &amp; related documentation</li> <li>• Demonstration of effectively procuring the machine</li> <li>• Apply different sales &amp; upselling techniques &amp; handle related objections</li> <li>• Illustrate the reconciliation process &amp; demonstrate day-to-day operations to support field sales process.</li> </ul> <p><b>Product 3 – Sound Box (30</b></p> | <ul style="list-style-type: none"> <li>• What is Merchandising - Guidelines for QR</li> <li>• Market overview of the Product &amp; objection handling</li> </ul> <p><b>Product 2 – EDC (06 hours)</b></p> <ul style="list-style-type: none"> <li>• EDC Device features</li> <li>• Benefits to Merchants &amp; Product USPs</li> <li>• Overview of EDC Market &amp; major players &amp; new innovations</li> <li>• Market overview of the product</li> <li>• Documents required - Understanding Business Verification process &amp; types of proofs</li> <li>• What is reconciliation &amp; how to do it</li> <li>• Documents required - Understanding Business Verification process &amp; types of proofs</li> <li>• What is reconciliation &amp; how to do it</li> </ul> <p><b>Product 3 – Sound Box (06 hours)</b></p> <ul style="list-style-type: none"> <li>• Sound Box overview &amp; features</li> <li>• Device Details</li> <li>• Sound Box Market – a new innovation, USP &amp; objection handling scripts</li> <li>• Demo of Sound Box Mapping</li> <li>• Queries &amp; Q&amp;A</li> <li>• Troubleshooting in sound box - common scenarios like Device/ Software/ Network/ Bank account</li> </ul> |
|--|--|--|---|



|                                 |   |   |   |
|---------------------------------|---|---|---|
|                                 |   | <p><b>hours)</b></p> <ul style="list-style-type: none"> <li>• Illustrate the use, features &amp; working of the Sound Box</li> <li>• Ability to demonstrate its use, effectiveness need from competitive features &amp; pricing point of view to the Merchant needs</li> <li>• Demonstrate mapping of Sound Box</li> <li>• Demonstrate the process of validate a Business &amp; related documentation</li> <li>• Demonstration of effectively procuring the equipment</li> <li>• Apply different sales &amp; upselling techniques &amp; handle related objections</li> <li>• Demonstrate troubleshooting of the equipment in real life situation</li> </ul> <p><b>Product 4 – Fastag (30 hours)</b></p> <ul style="list-style-type: none"> <li>• Illustrate the use, features &amp; working of the Fastag</li> <li>• Ability to demonstrate its use, effectiveness need from competitive features &amp; pricing point of view to the users needs</li> <li>• Demonstrate the process of issuing Fastag</li> <li>• Demonstrate the understanding of Vehicle categorisation</li> <li>• Demonstration the effective handling of Fastag related documentation &amp; doing KYC</li> </ul> | <p><b>Product 4 – Fastag (06 hours)</b></p> <ul style="list-style-type: none"> <li>• What is fastag &amp; the Fintech Innovation</li> <li>• What is Paytm Fastag, Its features &amp; benefits for users.</li> <li>• Understanding The Fastag Market</li> <li>• App tour to issue Fastag - Feature Phone &amp; Smart Phone (state wise customisation)</li> <li>• Understanding Vehicle Weight categorisation</li> <li>• Handling Fastag Documentation and KYC</li> </ul> |
| <p>Professional Skill – 120</p> | <p>Develop &amp; Apply Sales Skills in actual B2B Fintech</p> | <ul style="list-style-type: none"> <li>• Demonstrate Merchant on boarding Process &amp; practice it on the field. (15 hours)</li> </ul>   | <ul style="list-style-type: none"> <li>• Learn merchant on boarding process &amp; its steps. List different steps for on boarding, tracking</li> </ul>  |

|   |   |  |  |
|---|---|--|--|
| <p>hours</p> <p>Theory – 24 hours</p>                         | <p>Market.</p>  | <ul style="list-style-type: none"> <li>• Demonstrating the understanding of types of Merchants &amp; the verification, on boarding process/ steps required. (15 hours)</li> <li>• Demonstrate the understanding of Market guidelines. (10 hours)</li> <li>• Demonstrate the teaching of how PSA app works. (15 hours)</li> <li>• Practice &amp; demonstrate the understanding of Sales Pitch &amp; Process for each product. (40 hours)</li> <li>• Returns &amp; Refunds scenario &amp; Process. (15 hours)</li> <li>• Business Verification Logic Matrix. (10 hours)</li> </ul> | <p>etc. on the PSA app. (4 hours)</p> <ul style="list-style-type: none"> <li>• Understanding Paytm competitive strengths. (2 hours)</li> <li>• App tour on Merchant On boarding &amp; guidelines. (2 hours)</li> <li>• Learning the Market guideline. (2hours)</li> <li>• Learning &amp; identifying the different sales techniques &amp; learning funnelling for target achievement. (4 hours)</li> <li>• List the steps for Sales pitch for each product along with its price, USP and process the sale on the app. (2 hours)</li> <li>• Learning the demonstration of PSA app for Merchant (Simulation). (2 hours)</li> <li>• List the various steps of verifying a Business &amp; learning Business Verification Logic Matrix. (2 hours)</li> <li>• Discuss the different scenarios for refunds &amp; returns &amp; how to process that on the app. (2 hours)</li> <li>• List the QC guideline. (2 hours)</li> </ul> |
| <p>Professional Skill - 90 hours</p> <p>Theory - 18 hours</p> | <p>Display competence for effective communication with prospective clients/ sales environment and display professional grooming &amp;</p> | <ul style="list-style-type: none"> <li>• Demonstrate Professional dressing principles at work. (35 hours)</li> <li>• Practice self-introduction in work scenario. (35 hours)</li> <li>• Identify career objective &amp; be able to identify the path</li> </ul>  | <ul style="list-style-type: none"> <li>• Understand Grooming &amp; Self Presentation. (4 hour)</li> <li>• Rules of Dressing for sales. (4 hour)</li> <li>• Understand the Levers of career building. (5 hour)</li> </ul>   |

|   |  |  |  |
|---|--|--|--|
|   | presentation.  | to it. (20 hours)  | <ul style="list-style-type: none"> <li>• Tips for Effective self-presentation. (5 hour)</li> </ul>   |
| <p>Professional Skill- 120 hours</p> <p>Theory-24 hours</p>   | Deal with Merchant remotely & learn Merchant revisiting. | <ul style="list-style-type: none"> <li>• Opening a conversation &amp; following through with help of scripts. (60 hours)</li> <li>• Practice Negotiation Techniques &amp; skills. (30 hours)</li> <li>• Practice &amp; learn different objection Handling Scenarios. (10 hours)</li> <li>• On the field practice of Merchant troubleshooting (with support). Solve routine problems, largely through precedent and referral to general guidelines. (20 hours)</li> </ul> | <ul style="list-style-type: none"> <li>• Understanding Merchants ecosystem &amp; reasons for revisit.(4 hours)</li> <li>• Understanding Merchants &amp; categorisation of Merchants (2 hours)</li> <li>• Discuss the importance of proper introduction, the purpose of the visit.(4 hours)</li> <li>• Script for opening a conversation &amp; following through steps. (4 hours)</li> <li>• Learn techniques of Negotiation. (2 hours)</li> <li>• Scenario Based Learning on Handling Merchant Queries &amp; troubleshooting. (4 hours)</li> <li>• Identify the types of technical and non-technical queries. (4 hours)</li> </ul> |
| <p>Professional Skill - 90 hours</p> <p>Theory - 18 hours</p> | Apply a range of recognized time management techniques.  | <ul style="list-style-type: none"> <li>• Define the scope of work. (45 Hrs.) Analyse needs, requirements and dependencies in order to meet the work requirements.</li> <li>• Apply effective work planning principles. (45 Hrs.) Apply resource management principles and techniques. Demonstrate the ways to maintain an organized work</li> </ul>  | <ul style="list-style-type: none"> <li>• Understand Techniques of Time Management. (6 hours)</li> <li>• Planning work &amp; task achievements. (6 hours)</li> <li>• Prioritisation of work &amp; logical sequencing. (6 hours)</li> </ul>  |
| <b>Project work</b>   |  |  |  |

|  |             |
|--|-------------|
|  | Revision    |
|  | Examination |



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## 9. SYLLABUS - CORE SKILLS

### SYLLABUS FOR CORE SKILLS

1. Employability Skills (Common for all trades) (120Hrs + 60 Hrs)

Learning outcomes, assessment criteria, syllabus and Tool List of Core Skills subjects which is common for all trades, provided separately in [www.bharatskills.gov.in](http://www.bharatskills.gov.in)

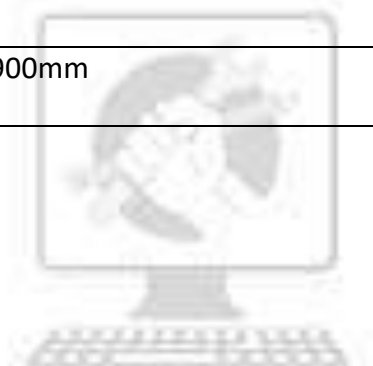


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| List of Tools & Equipment           |                                     |  |                                  |
|-------------------------------------|-------------------------------------|--|----------------------------------|
| Fintech Sales Executive (Flexi MoU) |                                     |  |                                  |
| (For batch of 30 candidates)        |                                     |  |                                  |
| S No.                               | Name of the Tools and Equipment     | Specification  | Quantity                         |
| <b>A. TRAINER TOOLS/ EQUIPMENT</b>  |                                     |  |                                  |
| 1.                                  | Laptop for virtual presentations    | 4th Gen Ci5 or higher processor, 4 GB RAM, 1TB Hard Disk, Win8/ latest Preloaded licensed OS, 2GB Graphics Card, Standard Ports and Connectors | 01 No.                           |
| 2.                                  | Wi-Fi Router                        | With wireless connectivity   | 01 No.                           |
| 3.                                  | Switch                              | 24 Port  | 01 No.                           |
| 4.                                  | Internet Connectivity               | Broadband connection with min. 2 mbps speed  | As required                      |
| 5.                                  | Headphone and mic. Set              | Wired  | 05 Nos.                          |
| 6.                                  | Telephone                           | Standard landline telephone  | 24 Nos.                          |
| 7.                                  | Voice recorder                      |  | As required                      |
| 8.                                  | MS Office                           | 2016 (professional) or the latest version available at the time of procurement   | 1 each regional trainer          |
| 9.                                  | Antivirus for clients               | Validity of an year or more which should be renewed upon expiry  | 1 each regional trainer          |
| 10.                                 | Open Office or equivalent           | Latest version   | Open Source Software             |
| 11.                                 | Browser                             | Latest version of Chrome or Edge   | Working browser                  |
| 12.                                 | Voice Call software                 | Zoom or Microsoft Teams  | Latest version                   |
| 13.                                 | Outlook / Any other Email Client    | Latest Version   | Proprietary/Open Source Software |
| 14.                                 | Sample sales tool for demonstration | Latest Version   | Proprietary/Open Source Software |
| 15.                                 | Sample ticketing tool for           | Latest Version   | Proprietary/Open                 |

|                                    |   |   |                                  |
|------------------------------------|---|---|----------------------------------|
|                                    | demonstration   |   | Source Software                  |
| 16.                                | Internet messenger and Web based Chat tools                                       | Latest Version  | Proprietary/Open Source Software |
| <b>B. TRAINER TOOLS/ EQUIPMENT</b> |   |   |                                  |
| 1.                                 | Smart phone   | Smart phone that meets configurations like good battery life(full charged), OS Android preferred, 4-6 GB ram (higher the better), minimum 2 GB data plan per day – 4G network, high quality camera (12 to 20 mega pixel), ear phones & microphone | 1 each learner                   |
| 2                                  | Required apps as mandated by the Organization                                     | HRIS & relevant apps as suggested by Org & Zoom   | NA                               |
| 3                                  | Specified email account for the purpose of overall course engagement & assessment | Only 1 email account specifically assigned for the overall learning engagement  | NA                               |
| 4                                  | Seating facility  | Breezy, Noise & distraction free seating facility for remote class attendance   | NA                               |

| Tools & Equipment for Employability Skills |  |                        |
|--|--|------------------------|
| S No.                                      | Name of the Equipment  | Quantity               |
| 1  | Computer (PC) with latest configurations and Internet connection with standard operating system and standard word processor and worksheet software | 30 no.                 |
| 2  | UPS - 500VA  | 30 no.                 |
| 3  | Scanner cum Printer  | 1 no.                  |
| 4  | Computer Tables  | 30 no.                 |
| 5  | Computer Chairs  | 30 no.                 |
| 6  | LCD Projector – One in each class room   | One in each class room |
| 7  | White Board 1200mm x 900mm   | One in each class room |



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| Trainee Internal Assessment Report                                    |                         |  |  |          |                     |             |                             |             |                     |  |
|---|-------------------------|--|--|----------|---------------------|-------------|-----------------------------|-------------|---------------------|--|
| Name :  |                         |  | Batch No:  |          |                     |             |                             |             |                     |  |
| Card ID No :  |                         |  | Dept:  |          |                     |             |                             |             |                     |  |
| Attendance % :  |                         |  |  |          |                     |             |                             |             |                     |  |
| Quarters  | Month                   | Attend %   | Month  | Attend % | Month               | Attend %    | Quarterly Average Attend. % |             |                     |  |
| Qtr-1   |                         |  |  |          |                     |             |                             |             |                     |  |
| Qtr-2   |                         |  |  |          |                     |             |                             |             |                     |  |
| Qtr-3   |                         |  |  |          |                     |             |                             |             |                     |  |
| Qtr-4   |                         |  |  |          |                     |             |                             |             |                     |  |
| General Assessment  |                         |  |  |          | Assessment Period : |             |                             |             |                     |  |
| S.No  | ATTRIBUTES              |  |  |          | Score Qtr-1         | Score Qtr-2 | Score Qtr-3                 | Score Qtr-4 | Score Sum of 4-Qtrs |  |
| 1   | Safety                  | Knowledge, follow safety precautions and rules                             |  |          |                     |             |                             |             |                     |  |
| 2   | Sense of Responsibility | Does he obey Sup/Line i/c instructions                                     |  |          |                     |             |                             |             |                     |  |
|   |                         | Does he attend shift start meetings regularly                              |  |          |                     |             |                             |             |                     |  |
|   |                         | Does he take supervisors feedback properly                                 |  |          |                     |             |                             |             |                     |  |
|   |                         | Whether he takes planned leaves  |  |          |                     |             |                             |             |                     |  |
|   |                         | Does he participates in new drives   |  |          |                     |             |                             |             |                     |  |
|   |                         | Does he take care in handling tools  |  |          |                     |             |                             |             |                     |  |
|   |                         | Is Punctual  |  |          |                     |             |                             |             |                     |  |
|   |                         | Positive, Behaviour, response, learning                                    |  |          |                     |             |                             |             |                     |  |
|   |                         | Maintain 5S at his work station  |  |          |                     |             |                             |             |                     |  |
|   |                         | Co-operation - Consider team work, willingness to work with and for others |  |          |                     |             |                             |             |                     |  |
| Able to identify and report irregularities at his work place          |                         |  |  |          |                     |             |                             |             |                     |  |
| 3   | Method                  | Follow WIS/MOS   |  |          |                     |             |                             |             |                     |  |
|   |                         | Able to check faults of previous station                                   |  |          |                     |             |                             |             |                     |  |
|   |                         | Understands tools/equipment functions and its different parts              |  |          |                     |             |                             |             |                     |  |
|   |                         | Able to perform the job independently                                      |  |          |                     |             |                             |             |                     |  |
| 4   | Speed                   | Able to match line "TACT" time   |  |          |                     |             |                             |             |                     |  |
|   |                         | Willingness to learn/flexibility for alternate job                         |  |          |                     |             |                             |             |                     |  |
|   |                         | Work completion/target achievement   |  |          |                     |             |                             |             |                     |  |
| 5   | Quality                 | Able to contain defects  |  |          |                     |             |                             |             |                     |  |
|   |                         | Awareness about GCA/PDI  |  |          |                     |             |                             |             |                     |  |
|   |                         | Skill acquired during "On job training"                                    |  |          |                     |             |                             |             |                     |  |
| <b>Total Score</b>  |                         |  |  |          |                     |             |                             |             |                     |  |
| <b>Max. Marks</b>   |                         |  |  |          |                     |             |                             |             |                     |  |
| (Fill score in relevant box)  |                         |  | Excellent : 4, Very Good : 3, Good : 2, Fair : 1, Need Improvement : 0 |          |                     |             |                             |             |                     |  |
| <b>Remarks (Supervisor): (Mention achievement/Critical incidents)</b> |                         |  |  |          |                     |             |                             |             |                     |  |
|   |                         |  |  |          |                     |             |                             |             |                     |  |
| <b>Remarks (Shift Incharge/Dept, Manager):</b>                        |                         |  |  |          |                     |             |                             |             |                     |  |
|   |                         |  |  |          |                     |             |                             |             |                     |  |
| <b>Remarks (MSTA Training Coordinator):</b>                           |                         |  |  |          |                     |             |                             |             |                     |  |
|   |                         |  |  |          |                     |             |                             |             |                     |  |