

# BANKEDGE FRANCHISEE ONBOARDING & ORIENTATION MANUAL

## *A Comprehensive Guide for New Franchise Partners*

### **A. Purpose of This Document**

The BANKEDGE Franchisee Onboarding & Orientation Manual has been created to ensure that every franchise partner begins their journey with complete clarity, alignment, and operational readiness. This document delivers the following objectives:

**1. Standardization Across All Centres**

BANKEDGE has a decade-long reputation in the BFSI skilling ecosystem. To uphold consistent quality across all centres—irrespective of geography—every franchisee must operate under the same systems, SOPs, and guidelines.

**2. Smooth Centre Launch With No Ambiguity**

New franchisees often have questions regarding infrastructure, hiring, branding, academic operations, fees, and marketing. This manual addresses each area explicitly to avoid confusion, delays, or miscommunication.

**3. Accelerated Revenue Generation**

When a new franchise partner follows a structured step-by-step onboarding system, initial revenue cycles begin faster and with higher success rates. This guide ensures that from Day 1 onwards, your centre is on the path to profitability.

**4. Transparent Expectations Between Franchisee & BANKEDGE HO**

The manual outlines what you can expect from the BANKEDGE Head Office (HO) and what HO expects from you. This clarity strengthens the partnership.

**5. Compliance, Safety & Legal Governance**

The document ensures that all BANKEDGE centres meet compliance requirements related to branding, training, student safety, financial controls, and service delivery.

**6. Long-Term Sustainability & Network Growth**

A structured onboarding approach leads to better student experience, smoother academic delivery, and enhanced placement outcomes—ensuring sustainable business growth for franchisees.

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This guide is therefore not just an instruction document; it is a strategic playbook that ensures you succeed as a BANKEDGE partner.

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# **B. COMPLETE, EXPANDED ONBOARDING & OPERATIONS GUIDE**

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## **1. Pre-Onboarding Requirements**

### **1.1 Franchise Agreement Execution**

This phase establishes the legal and commercial relationship between the franchisee and BANKEDGE.

**Includes:**

- Understanding the commercial model, revenue share, brand usage rights.
- Executing the Franchise Agreement and non-disclosure undertakings.
- Submitting essential documents (KYC, GST, address proof, cancelled cheque).
- Clearing the Franchise Fee as per the agreed schedule.

**Why this matters:**

Proper execution ensures both parties are aligned legally before operational investments begin. It protects rights, obligations, and commercial interests.

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### **1.2 Centre Infrastructure Planning**

Once the location is shortlisted, HO verifies viability through demographics, competition analysis, and access.

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## Minimum Infrastructure Requirements:

- 500–800 sq. ft. premises
- Counselling cabin
- Classroom with 25–40 seating
- Reception + waiting area
- Branded facade board
- Signage and interior branding
- AC, CCTV, Wi-Fi
- Projector or smart board

### Why this matters:

BANKEDGE's student experience relies on uniform infrastructure standards. Well-planned centres ensure brand consistency and professional learning atmosphere.

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## 1.3 Pre-Launch Compliance

### Mandatory compliance elements include:

- Fire and safety norms (localised by region).
- Municipal permissions (if necessary).
- GST-enabled fee collection.
- Bank account setup for student fee reconciliation.

### Why this matters:

Compliance protects the franchisee from legal disruptions and builds trust with students, parents, and recruiting companies.

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## 2. Day 1–15 Onboarding & Setup Workflow

This is the **Golden Period** of launching the centre. Each task must be completed without deviation.

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## Phase 1: Centre Setup & Branding (Days 1–7)

### Key Activities:

- 1. Space Preparation**  
Interior layout must follow the approved design shared by BANKEDGE HO to ensure brand uniformity.
- 2. Complete Branding Installation**  
Visual branding such as wall posters, student success stories, training roadmap panels, and facade boards creates immediate brand trust.
- 3. Technology Setup**
  - ERP/CRM system activation
  - LMS integration with Zoom module
  - ID creation for counsellors, faculty, and centre manager
  - Training on daily usage
- 4. Hiring Human Resources**  
BANKEDGE HO supports hiring through:
  - Screening profiles
  - Conducting interviews
  - Recommending final candidates

### Why this matters:

The first impression to walk-in students determines conversions. Proper infrastructure and trained staff create credibility and operational momentum.

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## Phase 2: Faculty Alignment & Training (Days 8–12)

### Key Activities:

- Allocation of BANKEDGE certified faculty.
- Two-day structured induction covering curriculum, pedagogy, assessments, and case-based learning.
- Orientation on student engagement, grooming, and placement-readiness.
- Mock training sessions with academic audit.

### Why this matters:

BANKEDGE programs are placement-oriented. Faculty must deliver training that matches industry expectations. Training ensures uniform teaching quality across India.

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## Phase 3: Lead Generation & Marketing Activation (Days 8–15)

### Digital Initiatives (Handled By HO)

- Meta lead generation ads
- Google local search ads
- WhatsApp broadcast setup
- GMB optimization for reviews and visibility

### BTL Initiatives (Handled By Franchisee)

- College seminars
- Coaching class tie-ups
- Posters/fliers in tuition zones
- Corporate cluster visits
- Local student influencer engagement

#### Why this matters:

Initial 30 days determine enrolment momentum. Aggressive marketing ensures the centre achieves the first target of 20 enrollments quickly.

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## 3. BANKEDGE Technology Ecosystem

The BANKEDGE tech stack ensures efficiency, central control, and data-driven operations.

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### 3.1 ERP/CRM Training

#### Functionality:

- Lead auto-capture from digital campaigns
- Traffic source tracking
- Follow-up reminders
- Conversion movement tracking

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- Fee collection & receipting
- Daily reporting

**Why this matters:**

The CRM is the backbone of sales productivity. Every missed lead is a lost revenue opportunity.

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## 3.2 LMS (Moodle) Training

**Key Features:**

- Program modules
- Recorded lectures
- Assessments
- Zoom class integration
- Certificate generation

**Why this matters:**

The LMS ensures standardized, high-quality training delivery, irrespective of geographic boundaries.

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## 3.3 Email & Communication Norms

Official email IDs ensure:

- Professional communication
- Central traceability
- Quick support resolution
- Clear escalation trail

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# 4. Academic Operations SOP

## 4.1 Batch Launch Protocol

Steps:

1. Achieve minimum 20 enrolments.
2. Confirm faculty allocation.
3. Conduct student induction session covering program, rules, outcomes.
4. Give LMS access and onboard them.
5. Finalize time-table.

### Why this matters:

A structured batch launch builds confidence among students and parents and sets the tone for the training journey.

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## 4.2 Training Delivery Standards

- Curriculum adherence is mandatory.
- Minimum teaching hours per module must be maintained.
- Use of real-life case studies.
- Weekly assessments and feedback.
- Student grooming and communication enhancement.

### Why this matters:

BANKEDGE's placement success is tied directly to training quality. Deviation impacts outcomes and brand trust.

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## 4.3 Attendance & Performance Tracking

- ERP-based attendance
- Weekly faculty reports
- Mid-course intervention for weak students

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**Why this matters:**

Employers look for discipline and commitment. Tracking helps improve placement readiness.

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## 4.4 Certification

Certificates are issued only after:

- Completion of modules
- Submission of assessments
- Final test clearance with minimum 60% marks

**Why this matters:**

Certifications carry BANKEDGE brand reputation and are validated by industry partners.

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# 5. Sales & Counselling SOP

## 5.1 Lead Management

- 3-hour maximum response time
- Minimum 5 follow-ups per lead
- Daily WhatsApp & SMS nurturing
- Walk-in conversion analysis

**Why this matters:**

Effective lead management improves student acquisition and revenue.

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## 5.2 Counseling Process

Steps:

1. Building rapport
2. Understanding student aspiration
3. Mapping career options

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4. Program explanation
5. Showing centre and faculty credentials
6. EMI/finance options
7. Closing the admission
8. Documenting in ERP

**Why this matters:**

Parents/students expect clarity and career-path assurance before paying fees.

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## 5.3 Daily Reporting

Includes:

- Walk-in summary
- Fee collection
- Counsellor performance
- Marketing feedback

**Why this matters:**

Daily visibility allows HO to support the franchisee proactively.

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# 6. Placement Operations SOP

## 6.1 Placement Onboarding

- Resume creation
- Soft skills grooming
- Mock interviews
- Bank-wise process familiarization

**Why this matters:**

Students join BANKEDGE primarily for job opportunities. Preparation is essential.

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## 6.2 Job Mapping

BANKEDGE places candidates in:

- Private banks
- NBFCs
- Fintech companies
- Insurance & AMC companies

### **Why this matters:**

Mapping ensures students receive job roles aligned to their capability and preferences.

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## 6.3 Placement Guidelines

- Students must be prompt, responsive, and well-groomed.
  - No last-minute dropouts.
  - Franchisee to ensure attendance during mock drills.
  - Feedback to be shared with HO after each interview.
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# 7. Finance & Compliance

## 7.1 Fee Collection & Receipting

- Fees must be collected through ERP only.
- No manual receipts allowed.
- GST compliance mandatory.
- Monthly reconciliation.

### **Why this matters:**

Ensures transparency and protects both franchisee and students.

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## 7.2 Royalty/Revenue Sharing

- Monthly invoice raised by Franchisee
- Payment cycle fixed
- Non-compliance attracts penalties

### **Why this matters:**

Ensures franchisee-HO financial trust and smooth operations.

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## 7.3 Compliance Checklist

Covers:

- GST
- Labour laws
- Safety norms
- Local regulations

### **Why this matters:**

Avoids legal liabilities that can hamper centre operations.

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# 8. Support System & Escalation Matrix

BANKEDGE HO provides support across all functions:

- Academics
- Marketing
- HR
- Technology
- Placement
- Centre operations

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In case of issues:

1. Centre Manager
2. Regional Manager
3. Functional Head
4. COO
5. CEO

**Why this matters:**

Ensures fast issue resolution and operational continuity.

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## 9. 90-Day Success Roadmap

### Month 1

- Centre launch marketing
- Sales training for front line staff
- BTL Marketing and college tie-up activities starts

### Month 2

- Achieve minimum 10 admissions
- Conduct student engagement activities
- Run placement orientation

### Month 3

- First batch is launched with 25 students minimum
- Achieve steady monthly revenue
- Implement continuous improvement

**Why this matters:**

The first 90 days determine long-term success.

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# 10. Quality & Compliance Audits

Monthly audit covers:

- Branding
- Infrastructure
- Lead management
- Training delivery
- Student satisfaction
- Fee compliance

**Why this matters:**

Protects the brand reputation and ensures uniform student experience.

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# 11. Centre Launch Event Protocol

Recommended steps:

- Minimum 20 to 25 enrollments by end of second month or max by first week of 3<sup>rd</sup> month
- Invite VIP/industry speakers
- Press meet
- Social media coverage
- Parent-student meet

**Why this matters:**

Helps the centre gain early visibility and trust in the local market.

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