

COURSE CONTENTS

MODULE Nº1: INTRODUCTION TO CE/BB

The effective implementation of a Branchless Banking (BB) service requires a deep understanding of your customer's experience using the service. This module describes how Consumer Education (CE) can help support a customer's experience and BB adoption process by building their financial capabilities.

Learning Objectives:

By the end of this module participants would have...

- Gained a better understanding of what CE is
- Identified how CE supports the adoption of BB

MODULE Nº2: BUILDING AN EMBEDDED CE STRATEGY

This module introduces participants to the process for building a clear, focused and sustainable CE/BB strategy. Participants will examine how to integrate CE within their institution, beginning with an internal needs assessment and stakeholder engagement.

Learning Objectives:

By the end of this module participants would have...

- Identified common challenges that institutions can face when implementing CE
- Determined how an embedded model for CE/BB can increase effectiveness

MODULE Nº3: ENABLING BEHAVIOR CHANGE

Developing financial capability is all about behavior change! This module examines the consumer BB adoption process, providing suggestions on how to apply these insights to enhance the design and implementation phases of your CE/BB Strategy. Participants will gain a greater understanding of how to use consumer education to create an enabling environment which supports a change from 'inactive' to 'active' BB behavior.

Learning Objectives:

By the end of this module participants would have...

- Examined the drivers and potential obstacles for each stage of the customer adoption process for BB
- Determined how to implement BB effectively to promote behavior change, based on adult learning principles

MODULE Nº4: IDENTIFYING CONSUMER NEEDS

This module identifies and responds to those asking "Why is market research needed for CE/BB?"

Find out what type of information and sources are necessary for the successful design and implementation of a CE/BB program. Participants will be guided through important steps and considerations in the process of creating their own CE/BB Consumer Market Research study.

Learning Objectives:

By the end of this module participants would have...

- Identified the value of investing in a Market Research study for CE/BB

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- Determined how a customized MR study for CEBB can help identify the key determinants that impact customer's behaviour towards BB
- Commenced planning the implementation of their own MR study for CEBB

MODULE Nº5: DETERMINING KEY MESSAGES AND CREATING CONTENT

Not sure of the process for determining the key messages or selecting sequencing content for CEBB? You are in luck! This module specifically explores what knowledge, skills and degree of self efficacy customers require to enable change in their BB behavior.

Learning Objectives:

By the end of this module participants would have...

- Analyzed their market research findings to determine their customers' current BB behaviors
- Identified the key CE content needed to promote the benefits of BB

MODULE Nº6: MAPPING CONSUMER CONTACT POINTS

An effective CE strategy is an embedded CE strategy. This module explores the importance of understanding and analyzing consumer contact points so as to build an effective 'embedded' CEBB strategy.

Learning Objectives:

By the end of this module participants would have...

- Examined the value of using an "embedded" approach to CEBB
- Identified ways to embed CE at consumer contact points
- Evaluated the pros and cons of delivering CE at different contact points

MODULE Nº7: SELECTING THE RIGHT TOOLS FOR THE RIGHT JOB

'Selecting the right tools for the right job' highlights the key factors to consider when selecting CE tools. This module presents a variety of examples of CE tools and guides participants to select the best tools for their CEBB program.

Learning Objectives:

By the end of this module participants would have...

- Gained a better understanding of key factors to consider when selecting CE tools
- Increased awareness of the different CE tools that can be used in a CEBB program
- Identified the best tools to help them achieve their CEBB objectives

MODULE Nº8: FINALIZING YOUR CEBB STRATEGY

Congratulations! You have worked hard on the key elements needed for CE. In this module you will integrate all elements from across the CEBB course that form part of your CEBB Strategy to ensure that it works as a coherent plan.

Learning Objectives:

By the end of this module participants would have...

- Finalized working on all elements of their CEBB Strategy;
- Laid out a high-level overview for their CEBB Strategy and evaluated the strategy as a whole;
- Revised their CEBB Strategy with stakeholders to ensure alignment.