

ANNEXURE-1

CASA WAR ROOM SET UP AND SOP FOR ZONES/REGIONS & BRANCHES:

CASA WAR ROOM SETUP:

Particulars	BCC CASA War Room	ZO CASA War Room	RO CASA War Room
Mentor	CGM RL& NRI Business	Zonal Head	Zonal Head
Head – CASA War room	DGM, Retail Liabilities & DGM, NRI Business	NDGM/s (in case of more than one NDGM, multiple CASA War rooms headed by NDGMs will be formed to monitor Regions under them)	Regional Heads
CASA Warriors	Identified Staff of Retail Liabilities & NRI Business Vertical	Zonal /NDGM CASA Officers	Regional CASA Officers

Activities to be carried out at branches:

Activities / initiatives	Metro & Urban Branches	Semi Urban Branches	Rural Branches
bob LITE	<ul style="list-style-type: none"> Camps at Housing Societies & nearby commercial areas 	<ul style="list-style-type: none"> Camps at Housing Societies & nearby commercial areas SHG Camps Camps in nearby villages 	<ul style="list-style-type: none"> Camps in Villages at Gram Panchayat SHG Camps
Bob BRO	<ul style="list-style-type: none"> Camps in Colleges & Education Institutions 	<ul style="list-style-type: none"> Camps in Colleges & Education Institutions 	<ul style="list-style-type: none"> Camps in villages & nearby education Institutes
Salary	<ul style="list-style-type: none"> Camps at Govt. Institution, Corporates & units of our MSME/ Corporate clients 	<ul style="list-style-type: none"> Camps at Govt. Institution, Corporates & units of our MSME/ Corporate clients 	<ul style="list-style-type: none"> Camps at Schools & other MSME/Corporates units in nearby
Family (Parivaar)	<ul style="list-style-type: none"> Contacting existing customers Camps at Housing Societies & nearby commercial areas Customer meets 	<ul style="list-style-type: none"> Contacting existing customers Camps at Housing Societies & nearby commercial areas 	<ul style="list-style-type: none"> Contacting existing customers Camps at villages
NRI #	<ul style="list-style-type: none"> Camps in NRI dominant areas. Contacting existing NRI clients for new references of family and friends (NRIs) 	<ul style="list-style-type: none"> Camps in NRI dominant areas 	<ul style="list-style-type: none"> Camps in NRI dominant areas
BOB SDP	<ul style="list-style-type: none"> Contacting existing customers Camps at Housing Societies & nearby commercial areas Customer meets 	<ul style="list-style-type: none"> Contacting existing customers Camps at Housing Societies & nearby commercial areas 	<ul style="list-style-type: none"> Contacting existing customers Camps at villages

ACTIVITIES

1. bob BRO accounts canvassing – <u>Every Region</u> – 5 camps at colleges/ Institutions per week
2. Salary A/cs – <u>Every Region</u> – to mobilise / on-board 2 Institutions / companies / Govt. Bodies every month
3. bob LITE / Family (Parivaar a/cs) / BOB SDP A/cs – <u>Every branch</u> - 1 camp every week Every Branch to also organize activities at client site for opening new salary accounts in existing Corporate / MSME / Govt. bodies / institutional Clients for meeting the monthly run rate numbers given in the table below
4. Canvassing of POS Merchants – Every Region -200 POS per month

PER BRANCH TARGETS:

Scheme / Br. Category	M and U No. of account (Amt in Rs. Lakh)	SU No. of account (Amt in Rs. Lakh)	R No. of account (Amt in Rs. Lakh)
bob LITE Per day	6 (0.60)	6 (0.60)	2 (0.20)
bob BRO Per day	2 (0.30)	2 (0.25)	1 (0.10)
bob SDP \$\$ Per day	5 (0.25)	5 (0.15)	5 (0.10)
Salary A/cs Per month	100 (20.00)	50 (10.00)	5 (1.00)
Family (Parivaar) A/cs Per month	30 (45.00)	20 (30.00)	10 (15.00)
NRI A/cs per day including NRI Power pack a/c (for specialized NRI Branches & NRI Business dominant Branches)	5 (12.50)	5 (12.50)	5 (12.50)

\$\$ Target of BOB SDP for different category of branches are as under:

Branch category	Metro & Urban	Semi urban	Rural
Target per day per branch	5 BOB SDP of Rs.5000 each	5 BOB SDP of Rs.3000 each	5 BOB SDP of Rs.2000 each

Minimum amount of BOB SDP which to be considered for performance will be as under: For Metro, Urban & Semi Urban Rs.1000/- and for Rural: Rs.500/- (means BOB SDP opened with less than Rs.1000/- in M/U/SU branches and less than Rs.500/- in Rural branches will not be considered in performance.

Example: Four SDPs of Rs.500/- opened in rural will be considered as one SDP of Rs.2000/- and one SDP of Rs.4000/- opened in Rural will be considered as two SDPs.

Other Aspects, Roles & Responsibilities of CASA War Room:

ZO CASA war room:

1. To conduct huddle twice a day (morning & evening) to monitor & improve the performance of the Regions
Morning huddle: Monitoring the performance of the previous day and providing guidance for the day.
Evening: Monitoring of the midday performance and further guidance for the day.
2. To provide daily performance report to BCC along with details of Institutions contacted, camps organized by Branches/ Regions and all activities handled/ carried out by CASA war room.
3. To leverage and utilize the strong network of Banking Correspondents (BCs) and ensuring 100% activation of all BCs.

RO CASA war room:

4. to conduct huddle twice a day (morning & evening) to monitor & improve the performance of the Branches
Morning huddle: Monitoring the performance of the previous day and providing guidance for the day.
Evening: Monitoring of the midday performance and further guidance for the day.
5. To provide daily performance report to ZO along with details of Institutions contacted, camps organized by Branches/ Regions and all activities handled/ carried out by CASA war room.
6. To leverage and utilize the strong network of Banking Correspondents (BCs) and ensuring 100% activation of all BCs.

Achievement of Targets set for December 2023 and activities related to other existing liabilities business

The same war room will be used for:

1. Mobilising business from top 200 SB and top 200 CA customers of the branches.
2. Opening quality CASA accounts.
3. Mobilising Retail Term Deposits and Term deposits of upto Rs.10 crores
4. To use BCs and make them active.
5. For activation of dormant accounts for which a separate campaign is already launched.
6. Mobilisation of IPG, POS, QR Code, BCMS as per already given targets
7. To leverage and utilize the strong network of Banking Correspondents (BCs) and ensuring 100% activation of all BCs.
8. Digital Leads received SIEBEL CRM must be attended and closed on T+1 basis. Please note these leads are very important and have potential of high CASA accretion.