

# Case Study

## BRANCH MANAGERS' EXAMINATION COURSE (BM)



Jatinder Bajwa is a Banking Centre Leader (also known as a Branch Manager) at CIBC. As he was streamed at the bank to become a Banking Centre Leader, Jatinder proactively turned to IFSE before his promotion and took the required Branch Managers' Examination Course (BM).

He chose IFSE to fulfill his training needs because his employer highly recommended the BM. Jatinder also consulted with colleagues who had completed the course and he received positive feedback about their experience. Jatinder enrolled in the BM and soon discovered why the course is highly regarded. The content was well organized and easy to understand, equipping him with all of the requisite knowledge for his new position and expanded responsibilities.

When considering his experience with the BM, Jatinder found that the risk management material was invaluable. He learned how to mitigate (and, wherever possible, avoid) risk from both the bank's and the client's perspective. Jatinder also views the section on effective supervision as extremely practical, since he must often coach sales staff on determining client suitability and providing financial advice.

Having been the preferred candidate for an opening as Banking Centre Leader, Jatinder met all of the requirements in advance, with the BM being an important component.

### How has the BM helped Jatinder in his day-to-day job?

"Recently, our banking centre underwent an internal process assessment. Although such audits are standard for us, it can be stressful if you don't know what to expect. Having taken the BM, I understood the concepts and was able to coach my staff (and prepare myself!) for the audit interviews. The assessment went smoothly and my team appreciated my help."

What advice does Jatinder have for other students taking the BM?



"Preparation is key, learning all of the concepts inside out. Also try to apply the course content to your job so it becomes relevant and not just theoretical. It's also great that IFSE provides ongoing access to your course, even after you've completed it, so go back to the content when needed. I still refer to it now when certain questions arise."



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