

Time management for branch work

IBPS Clerk / Customer Service Associate | Ex-Servicemen workplace guide

Use with your assigned duties. Follow the bank's procedures, service standards and authorised instructions. No fixed transaction target or promotion promise is implied.

7 practical habits

- 1 Plan the next actions.** Identify priorities, deadlines and required inputs at the start of duty.
- 2 Verify before submitting.** Check the request and permitted workflow; never trade accuracy for speed.
- 3 Protect transaction focus.** Finish or safely hand over the current stage before changing tasks.
- 4 Communicate delays early.** Explain the blocker and request support before the deadline is missed.
- 5 Use authorised tools.** Work only with assigned access and approved templates or systems.
- 6 Coordinate breaks and cover.** Follow staff arrangements; do not leave a live counter unattended.
- 7 Review and hand over.** Record pending work properly and identify the next responsible role.

Daily checks

- ☐ Confirm the role allocation, pending items and applicable deadlines.
- ☐ Use the approved queue and applicable customer-assistance arrangements.
- ☐ Escalate a suspected fraud, discrepancy or security concern through the designated route.
- ☐ Review unresolved items, assigned closing checks and authorised handover.

Keep private information out. Do not copy customer records, transaction details, PINs, OTPs or passwords into personal notes, messaging apps or this worksheet.

Daily planning worksheet

Reusable learning template | No fixed office-hour schedule or official performance target

Write generic task categories only. Use this worksheet only where permitted by your employer. It is not an official transaction log. Do not enter customer names, account numbers, cash totals or credentials.

Plan the work, not a speed target

Generic task category	Due point	Next action	Blocker / support needed

End-of-duty reflection

One delay to discuss with the supervisor:

One workflow question for approved training:

Next generic task to review:

Official context - not the source of this timetable

RBI: customer assistance for senior citizens and persons with disabilities

RBI: commercial-bank cybersecurity and access-control framework

Bank of Baroda: published customer information and service-norms resources