Klarstig

Banking Product Knowledge Quiz

Use this short knowledge check to discuss sound working practices. Choose one answer for each scenario and explain how you would apply the guidance in your role.

Contact and reference

Organization using this document

Your name or contact reference *

Email for a reply if needed

Information for this document

Learner name or reference *

When instructions are unclear what should you do first *

- ☐ Assume the usual approach is acceptable
- ☐ Skip the task without telling anyone
- ☐ Ask the responsible person for clarification

What is the best way to document a completed task *

- ☐ Rely only on memory
- ☐ Record the result date and relevant evidence
- ☐ Mark complete before checking the result

A customer asks about a feature you cannot verify what should you say *

- ☐ Explain that you will check the approved product information
- ☐ Promise the feature is available
- ☐ Guess from another product

What makes a product explanation useful to a customer *

- ☐ List every feature without context
- ☐ Avoid discussing limitations
- ☐ Connect verified capabilities and limitations to the customer's needs

How will you apply these principles to your work *

Specific details

Product family or service covered

Complete when relevant to this request.

Approved sources for features limitations and current specifications

Operating context

Branch department or service reference

Complete when relevant to this request.

Authorized contact and handling requirements without account credentials

Limitations and what needs setup

- Submitting the form records the answers in your workspace. It does not approve, schedule, charge or reply on its own unless you add that step to the workflow.
- Email notifications, approval routing, document generation and connections to other systems are available but not switched on until you configure them.

Want help tailoring this form? Free, Starter and Pro include five personal setup sessions, up to 30 minutes each, per new organization.

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