Klarstig

Banking Product Knowledge Quiz

FICTIONAL EXAMPLE FOR ILLUSTRATION. NAMES, ADDRESSES AND NUMBERS ARE INVENTED.

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

Maple Street Community Center

Your name or contact reference *

Alex Rivera

Email for a reply if needed

alex.rivera@example.com

Information for this document

Learner name or reference *

Alex Rivera

When instructions are unclear what should you do first *

Assume the usual approach is acceptable

What is the best way to document a completed task *

Record the result date and relevant evidence

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

Explain that you will check the approved product information

What makes a product explanation useful to a customer *

Avoid discussing limitations

How will you apply these principles to your work *

(Free-text answer - not filled in for this example)

Specific details

Product family or service covered

Complete when relevant to this request.

Operations

Approved sources for features limitations and current specifications

(Free-text answer - not filled in for this example)

Operating context

Branch department or service reference

Complete when relevant to this request.

Operations

Authorized contact and handling requirements without account credentials

(Free-text answer - not filled in for this example)

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.

Klarstig / Daniel Petry · klarstig.ai · hello@klarstig.ai · support@klarstig.ai · 800-781-1775 · 11917 Laurel Ave., Forestville, CA 95436, USA