

A light blue silhouette of a world map is centered on the page, serving as a background for the title text.

Embedding New Account Representative Product Knowledge Workshop

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The Cohen Brown Law

It is never a client's/member's or prospect's responsibility to ask you, to tell you, or to understand anything about financial services, ever. It is your job to educate them.

Most training on product knowledge focuses on the topics of _____
and _____. The 20/80 Principle states that _____
of the actions generate _____ of the results.

Basic Benefits/Features

The first thing you want to do is establish the overall benefits of the account. The Big 5 financial benefits are:

- Make _____
- _____ Money
- _____ Money
- Protect _____
- Save Time and Provide _____



Product: Internet Banking	
Overall Benefits	Save Time and Money
Script	Many of my clients/members appreciate using Internet Banking because it saves them both time and money.
Feature	Avoid branch lines
Script	You can avoid branch lines .
Feature	Bank 24 hours a day
Script	It allows you to bank 24 hours a day .
Feature	Pay bills
Script	You are able to pay most of your bills through Internet banking.
Feature	Stay in constant touch with your accounts
Script	You are able to stay in constant touch with your accounts .
Feature	Safe and secure
Script	A very important feature is that it is safe and secure .



Product:	
Overall Benefits	
Script	
Feature	
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Script	



Product:	
Overall Benefits	
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Product:	
Overall Benefits	
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Coaching It

What is your big takeaway from today's session?

