



# LEARNING CATALOGUE

## DISCOVERY BANK

## HOW TO USE THIS CATALOGUE

This interactive document lists all the available training material for Discovery Bank. Each file has been linked and if you select the file it will open a tab in your chosen browser to the file saved on the DIT Portal ([www.ditportal.co.za](http://www.ditportal.co.za)).

There are various types of material listed under each heading/benefit, each catered to suit your learning needs. We have used simple icons (as seen below) to indicate what they type of material or file is.

### Icon guide



Sales Kits



Infographics



Online courses



Videos



Workshops



Support and Servicing



Workshops Summary



# INTRODUCTION TO DISCOVERY BANK



Introduction  
to Discovery  
Bank



## Sales Kits

Introduction to Discovery Bank



## Online courses


Introduction to Discovery Bank

# DISCOVERY BANK PRODUCTS



## Workshop and duration

Discovery Bank products

 3 hours



## Sales Kits

Day-to-Day Bank accounts and Credit Cards  
Savings accounts  
Foreign Exchange Account



## Online courses

Day-to-Day Bank accounts and Credit Cards  
Savings accounts  
Foreign Exchange Account

Discovery  
Bank  
products

## INTRODUCTORY WORKSHOPS



### How to register:

Keep an eye on your inbox for the monthly calendar from DIT that lists the available workshops. For more information on these workshops, email [DIT\\_Coordination2@discovery.co.za](mailto:DIT_Coordination2@discovery.co.za).

### Workshop requirements:




You may be required to access certain platforms, like the [Adviser 360](#), the [DIT Portal](#), the Discovery Website and SmartAdvice during your workshops. Please ensure you are able to access these platforms before joining the workshop.

### Discovery Bank

**Please note:** These workshops will provide you with a basic understanding about the products and benefits, please attend the 'Intermediate' workshops to gain a deeper and more advanced understanding about the products and benefits.

### Discovery Bank Products

 3 hours

Do you want to know which Discovery Bank products you can sell to your clients and how these products will suit all their banking needs?

Many of our clients are currently experiencing tough financial times. By showing them the dynamic interest rates and boosted dynamic lifestyles they can earn, you can help them bank smarter and plan for a healthier financial future.

After this workshop, you should be able to sell your client the banking product that meets their banking needs and show them the value that shared-value banking offers them. You should be able to convince your clients that Discovery Bank is the right choice for them.

### After completing this workshop, you should be able to:

- Define the qualifying criteria for clients applying for a Discovery Bank day-to-day account and a credit card account.
- Identify the four Discovery Bank account types.
- Match the four card colours available to clients with the qualifying annual income.
- Define the qualifying criteria for opening a Discovery Foreign Exchange Account and the fee charges.
- Discuss the dynamic lifestyle rewards applicable on each of the Discovery Bank products.
- Discuss the Dynamic Interest Rates available on each of the Discovery Bank products.
- Define the fees for each Discovery Bank product.
- Explain the 55 days interest free period.

Discovery  
Bank  
products

# THE VITALITY MONEY PROGRAMME



## Workshop and duration

The Vitality Money programme



2.5 hours



## Sales Kits

The Vitality Money programme



## Online courses

The Vitality Money programme

The Vitality  
Money  
programme

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The Vitality  
Money  
programme

### The Vitality Money Programme

 2.5 hours

Financial health is often associated with a high-income level and multiple sources of income. A recent study done by Discovery Bank indicates that financial health is less about how much clients earn and more about how they manage their money. (Banking for a stronger South Africa, 2021) Discovery Bank has identified five controllable behaviours that if left unmanaged, are linked to three risks that lead to 80% of the reasons why clients do not meet their financial obligations.

By attending this workshop, you will gain insights to these behaviours that can help your clients understand them and how to improve them. In turn, clients get rewards when they exhibit financial behaviours and outcomes that reflect that they are managing their money well.

### After completing this workshop, you should be able to:


- Explain what Vitality is.
- Explain the 5-3-80 model to clients.
- Position the Shared-Value banking model to clients.
- Explain what Vitality Money is.
- Describe how Vitality Money helps clients change the five controllable behaviours.
- Explain what the Vitality Money status is.
- Position and describe how the Vitality Money status works.
- Position and describe how clients can improve their Vitality Money status.
- Create more Discovery sales opportunities.
- Explain Vitality Money as a business tool.

# VITALITY MONEY REWARDS



## Workshop and duration

Dynamic Interest Rates and lifestyle rewards

 **3 hours**

Vitality Active Rewards and Discovery Miles

 **2.5 hours**



## Sales Kits

Dynamic Interest Rates and Lifestyle Rewards

Vitality Active Rewards

Discovery Miles



## Online courses

Dynamic lifestyle rewards: HealthyLiving

Dynamic lifestyle rewards: Gym benefit

Dynamic lifestyle rewards: Fuel and Uber rewards

Dynamic lifestyle rewards: Flight rewards

Rewards through Vitality Money: Vitality Active Rewards

Discovery Miles

**Vitality  
Money  
rewards -  
Discovery  
Miles and  
using rewards**



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### Vitality Money rewards 1- Dynamic Interest Rates and Lifestyle rewards

3 hours

As a result of the global pandemic, many South Africans have found themselves facing setbacks in both their financial wellbeing and their personal lives. Even though South Africa is making great strides in the roll-out of the vaccination programme, the future of the economy remains uncertain and many clients will feel the effects of the pandemic well into the future.

This is where Discovery Bank can help your clients out. Dynamic interest rates help clients get higher savings rates, lower borrowing rates, and earn interest on positive balances in their day-to-day accounts. In addition, clients who actively engage with Vitality can also earn more rewards by spending responsibly and achieving their money goals.

By attending these workshops, you will learn how Vitality Money helps clients manage five controllable behaviours and gain access to Dynamic Interest rates. They get rewarded with boosted spend discounts and travel rewards. If you'd like to help your clients secure their financial future, make sure you attend these workshops.

### After completing this workshop, you should be able to:

- Position Dynamic Interest Rates to your clients.
- Describe Dynamic Interest Rates.
- Discuss the qualifying criteria for Dynamic Interest Rates.
- Describe how Dynamic Interest Rates work.

Vitality Money rewards - Discovery Miles and using rewards

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### Vitality Money rewards 2- Vitality Active Rewards and Discovery Miles

 3 hours

Are you equipped to explain how Discovery Bank rewards your clients for saving more and paying off their debts?

Don't delay any further, arm yourself today with the knowledge you need to start having impactful conversations with your clients about the world's first shared value bank.

The Vitality Active Rewards money goal encourages and rewards clients for responsible saving and spending with Discovery Bank. When clients close their money ring, they achieve plays on the Vitality Active Rewards gameboard where they can earn hundreds of Discovery Miles every week and boost their rewards, savings and discounts with their integrated Discovery products.

#### After completing this workshop, you should be able to:

- Position the Vitality Active Rewards programme to clients.
- Describe the Vitality Active Rewards money goal.
- Identify the eligibility and qualifying criteria for the Active Rewards money goal.
- Explain how clients can activate the Vitality Active Rewards money goal.
- Describe how clients can engage with the programme.
- How to list the important rules that apply to the Vitality Active Rewards money goal

Vitality Money rewards - Discovery Miles and using rewards

# MANAGING YOUR ACCOUNT



## Workshop and duration

Managing your account and Value-added services

 **3 hours**



## Sales Kits

Managing your account and Value-added services



## Online courses

Value-added services

Managing  
your  
account  
and  
Value-added  
services

## INTRODUCTORY WORKSHOPS



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### Discovery Bank

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### Managing your account and value-added services

2 hours

Discovery Bank clients can manage their entire banking profile from the Discovery Bank app. It is loaded with features, making daily banking a breeze. Plus, they can customise their experience and add new accounts and cards with just a few taps.

After attending this workshop, you will be able to show your clients how to manage their Discovery Bank cards and accounts effectively on the Discovery Bank app. You also will be comfortable explaining the value-added services clients have access to that enhance their banking experience.

### After completing this workshop, you should be able to:

- Explain what a virtual card is.
- Explain how Discovery Bank clients can add a virtual card.
- Explain how clients get up to 20% off when purchasing prepaid products and services when using their Discovery Miles.
- List the steps clients need to follow to purchase prepaid products and services.
- Explain how clients can make payments with Discovery Pay.
- Explain how clients can make payments with Health Pay.
- List the benefits Discovery Bank clients have access to.
- List the travel benefits available to Discovery Bank clients.

Managing  
your  
account  
and  
Value-added  
services

# SUPPORT AND SERVICING



## Support and Servicing

Financial Advisor Platform

Discovery Bank Remuneration Manual

Know Your Client Guide

Bank Integration with other Discovery products

Discovery Life - Bank Integrator

Discovery Invest - Bank Integrator

**MORE CATALOGUES AVAILABLE ON THE DIT PORTAL:**

# THANK YOU

For more information on product and sales related training material, webinars and presentations, please go to the DIT Portal.  
([www.ditportal.co.za](http://www.ditportal.co.za))

