

# 5 TIPS FOR SUCCESS



## 1. tell



### Tell your client about us

It's a good idea to let your client know a bit about Paymentsshield before we call since so they know all about us. You could also give them one of our flyers or refer them to our website [www.paymentsshield.co.uk](http://www.paymentsshield.co.uk) so they understand our Home and Landlord's Insurance is 5 Star Defaqto rated and how experienced we are when it comes to insurance.

## 2. confirm



### Confirm a specific date and time slot

Agree a specific time slot with your client and make sure they're expecting us to contact them at that time. Selecting one timeslot which is best for your client (rather than selecting several options) improves our chances of getting through to them.

### 3. *inform*



#### Let them know the telephone number they'll be called by

We'll call your client from 0330 343 9152. If you've given us their mobile number to call, we'd suggest they save the number in their phone as Paymentsshield so they know who it is when we call. It's a good idea to make sure they're prepared for the call by letting them know they'll need to tell us how many years no claims bonus they've got and details of any claims in the last five years.

### 4. *send*



#### Send a quick reminder the day before

Make note of date and time you've asked us to call your client and then send them a reminder the day before to check the date and time is still convenient. We'll also email your customer with confirmation of when we're going to contact them but they're probably more likely to respond to a quick 'check-in' from you if there is a problem.

### 5. *check*



#### Check in with them afterwards

We'll share how the call went in Adviser Hub, including any changes to when we plan to contact the customer (for example if we call and they ask us to call back at another time). You'll find all the detail in the 'History' section of the referral area. However, whatever the outcome, it's a good idea to check in with your customer to see how they feel the conversation with us went. This also means you can respond to any questions or reservations they may have if they've not yet taken the policy.