



paymentshield

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PAYMENTSHIELD FURTHER ENHANCES REFERRAL SERVICE

Paymentshield has launched a new digital journey that now enables advisers to refer their clients to purchase a quality home insurance policy directly themselves.

This latest innovation is part of Paymentshield's ongoing commitment to making it easy for advisers to have a successful conversation about general insurance with every single client – no matter how busy they or their client might be.

The new online journey allows advisers to opt clients in to entering their own details online in order to receive a home insurance quote, which they can then click through to purchase in their own time.

It offers a solution for clients who signal a strong preference to self-serve and without this option might otherwise be lost. Therefore, it has the potential to revolutionise the way advisers conduct GI business.

Clients using the service will benefit from Paymentshield's optimised quote technology and partnership with third party data provider Lexis Nexis, which enables property data to be pulled in from external sources - meaning they only need to provide minimal information in order to get a price for their insurance.

Following referral via Paymentshield's unique Adviser Hub platform, clients opted into the online journey will be sent a link via email/text to access the online platform where they can enter their details in their own time and buy online once they're ready. If they do want to complete the purchase straight away, the whole journey takes just a few minutes.

This new digital self-serve journey will sit alongside Paymentshield's advised telephony referral option, which launched earlier this year. This means advisers now have a range of options as to how they use the service; they can fill in the referral form themselves and select either a telephony journey or online journey for their client; alternatively, they can invite their clients to 'self-refer' by sharing their unique web link or QR code, both of which are available in Adviser Hub.

Along with telephony referrals, all GI sales made via the new online journey will be integrated into the Adviser Hub dashboard, giving advisers full oversight of every lead.

For more information on Paymentshield's referral service please [visit their website](#).