

Paymentshield on hand to support

Paymentshield have made some changes recently designed to help you have more impactful conversations and provide your clients with a smoother general insurance buying process.

MAKING REFERRING EASY

Paymentshield's [latest technology enhancement](#) will enable you to refer customers to their own team of in-house experts if you don't have time to offer advice yourself, while retaining full oversight of the sale.

What makes this different from other referral services, is that Paymentshield's will integrate all referrals into Adviser Hub, giving you full transparency on every lead and customer interaction. This means that whether you offer the advice yourself, refer it to Paymentshield or do a mix of both, you'll be able to track all your GI business in one place.

Paymentshield have also launched a new digital journey that now enables you to refer your clients to purchase a quality home insurance policy directly themselves.

The new online journey allows advisers to opt clients into 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.

These new journeys now mean you have a range of options as to how to use the service; you can fill in the referral form yourself and select either a telephony journey or online journey for your client; alternatively, you can invite your clients to 'self-refer' by sharing your unique web link or QR code, both of which are available in [Adviser Hub](#).

BECOME A GI GENIUS

[GI Academy](#) is a free to access training hub filled with CPD accredited learning modules designed to transform anyone into a GI genius.

The seven modules, broken down into smaller chapters cover a wide variety of topics, everything from why sell GI in the first place, to Paymentshield's proposition, sales techniques and even Consumer Duty.

After you've completed a module, you can test your knowledge in the [tests section](#).

Outside of the core learning modules, you can also access Paymentshield's learning [library](#) filled with a selection of eBooks and whitepapers. Alongside the library, the dedicated events area allows you to watch back Paymentshield's latest [webinars](#), including "The value of your advice" and "Paymentshield's new quote journey".

GI SPECIALIST SUPPORT

If you have a GI Specialist in your team or want to become one, Paymentshield can provide you with lots of training and continuing support. Alongside GI Academy, both their [Intermediary Sales Team](#) and Regional Sales Managers can aide with business planning, soft skills development, and detailed product training.

Paymentshield also have a bank of on demand [webinars](#) which can be watched through at your own pace and provide completion certificates for unstructured CPD hours. These can be accessed through their webinar platform.

For those who might prefer reading or anyone looking to get another GI Specialist's opinion, Paymentshield have a [case study](#), which has been created with GI Specialist input where they share real life experiences and those little pearls of wisdom they have picked up over the years.



Say
hello.
TO OUR NEW REFERRAL SERVICE

We've launched a new referral service to help you offer quality insurance to each and every client. We're able to offer your clients advice on your behalf and you can track your client's journey from start to finish so you have full transparency of progress.

Watch our video to find out more:
paymentshield.co.uk/referral

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