



PAYMENTSHIELD  
SUPPORTIVE  
CONTENT

hello.

Whilst plans for 2024 may still be being finalised, here's a reminder of some of Paymentsshield's powerful content which can be shared with advisers to help get the year off to a great start.

There are both, adviser facing and customer facing content within this pack – everything from webinars, videos to learning modules.

The pieces of content have been specifically chosen to help educate advisers and enhance their GI conversations, benefiting not only the adviser but also the end customer.

Each section has links and supporting text which can be copied and pasted into your communications.

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# ADVISER FACING CONTENT



# REFERRAL



Paymentshield has launched a new referral service meaning advisers can easily offer insurance to every client.

Paymentshield is able to offer clients advice on your behalf ensuring those clients get full continuity of service following the advice they received during the mortgage process.



# Referral - Leaflet

## Top tips leaflet

To maximise the success of your referrals to Paymentsshield, here's five tips to make sure your clients understand and know what to expect from the service they'll be getting.



**5 TIPS  
FOR SUCCESS**



**paymentsshield**  
we've got it covered

## **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.

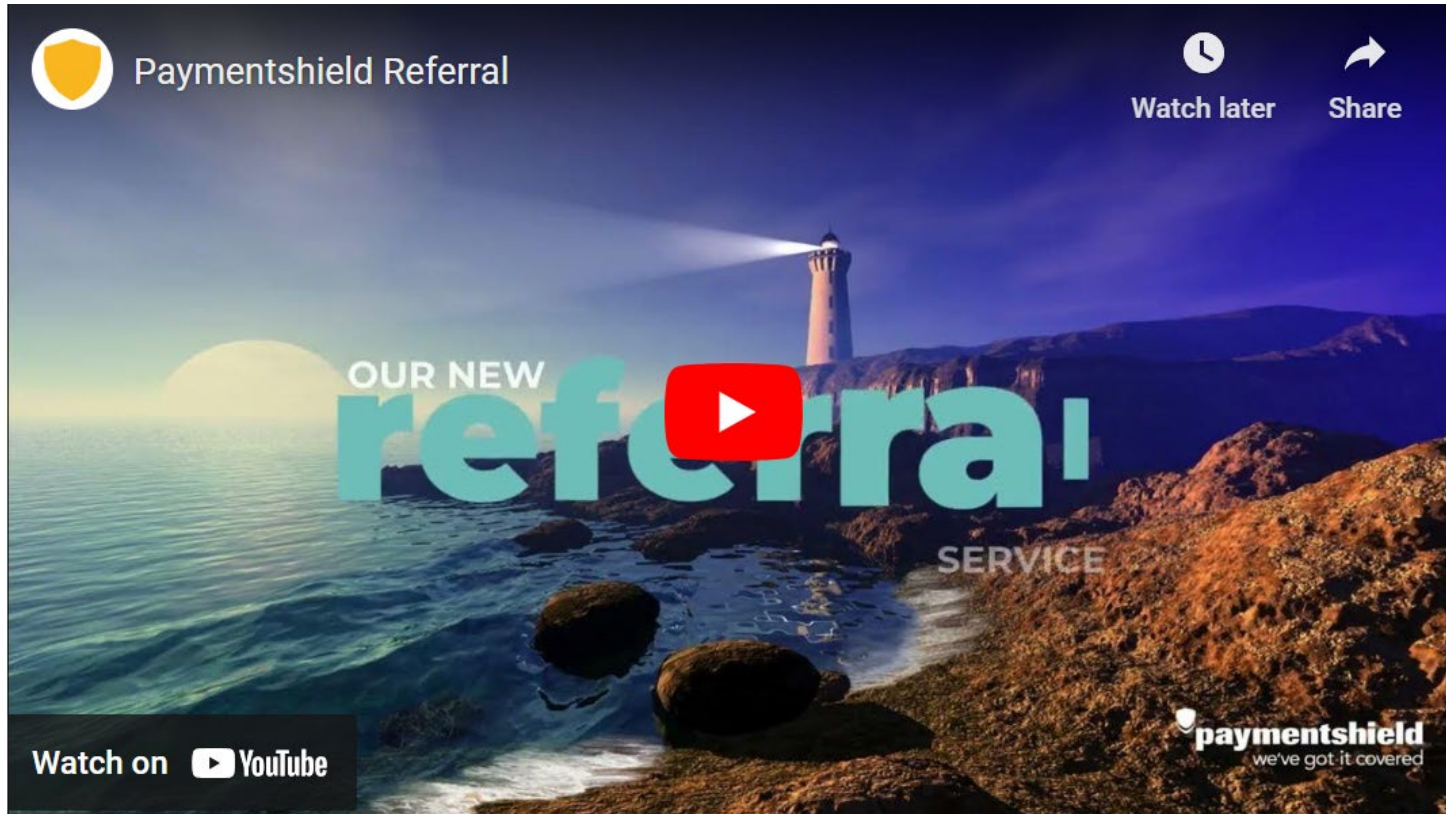
## **2. confirm**

### **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.



# Referral - Video



## Video

Paymentshield have introduced a new way of working enabling advisers to easily introduce business using their new referral scheme. Follow these simple steps to submit a referral.





# GI ACADEMY



GI Academy is filled with CPD-certified training modules designed to transform anyone looking to expand their knowledge of Paymentsshield and general insurance into a GI genius!

After you complete each module, you can download a CPD certificate for your efforts. You can then come back and dust off your knowledge by taking the product specific tests.



# GI Academy - new chapters

## Remortgage and product transfer

It's just as important to build a process for discussing general insurance with remortgage and product transfer clients as it is with other mortgage clients. This chapter helps you with building that process and explores the relevant tools to support you.

## Consumer Duty

This module covers the FCA's latest regulation. It provides an overview of the requirements, alongside suggestions for what needs to be done to meet these, as well as some tips for a positive GI experience for your clients.



# Modules

## Sales process module

This module was new for 2023, it covers the opportunities available during the mortgage process where you can talk GI, to the 3-quote process including what it is and when to use it. The module also includes a chapter on why it is just as important to discuss GI with your remortgage and product transfer clients as it is your mortgage clients.



# WEBINARS



Paymentshield's webinar series was created to help boost your GI conversations.

Each webinar has been designed to aid you when selling insurance, regardless of what stage of the GI journey you're at.

All Paymentshield's webinars count towards your 15-hour annual CPD requirement – a certificate can be downloaded after watching each event.

# 2023 Webinar Series

## Leveraging technology to support your GI conversations

This webinar explored the technology available at your fingertips and how you can best utilise each to benefit you and your clients during your GI conversations. From Paymentshield's Adviser Hub, to GI Academy and their recently launched optimised quote journey. The webinar also covered the challenges facing the market and how those impact the GI opportunity.



# 2023 webinar series

## Maximise your GI

This webinar was designed to be Paymentshield's most comprehensive yet.

Paymentshield looked at how planning for your GI conversations can make all the difference, as well as showing the different quoting options now available via Paymentshield, including their new referral journey. The webinar concluded with a section on optional extras and their benefits, and how to best utilise soft skills- such as effective questioning.



# 2023 webinar series

## Paymentshield's new quote journey

Paymentshield's newly launched optimised quote journey, which reduced their question set has made it easier to offer a quote to your client.

This webinar showcases the changes and how it now benefits you and your clients. It also looks into how your advice can help your clients avoid using online comparison sites and the risks they pose.



# 2023 Webinar Series

## The value of your advice

National Account Manager, Jeni Law, explored the value of your advice and how it can help your clients avoid one of expectation vs reality moments when buying their home insurance.



# CUSTOMER FACING CONTENT

# REFERRAL



Paymentshield has launched a new referral service meaning advisers can easily offer insurance to every client.

Paymentshield is able to offer clients advice on your behalf ensuring those clients get full continuity of service following the advice they received during the mortgage process.

Alongside the adviser facing content, Paymentshield have created a customer facing leaflet for those considering using referral.

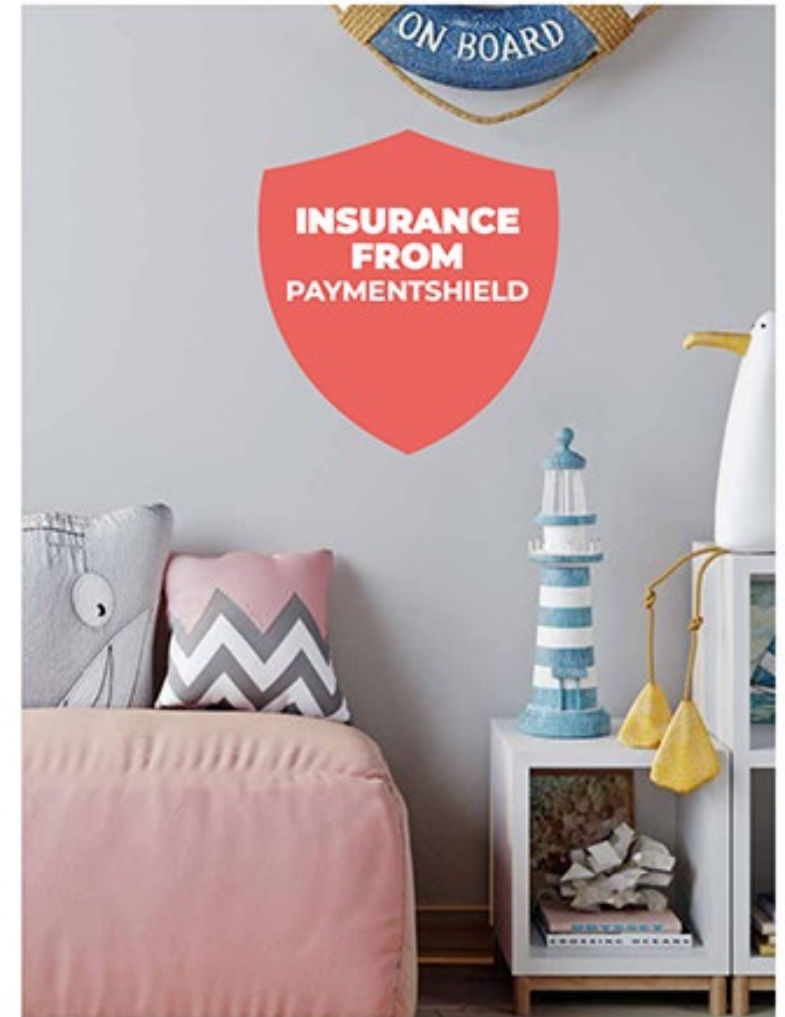


# Referral – customer leaflet

## Referral Leaflet

This leaflet has been designed to explain a bit more about who Paymentsshield are, including the benefits of a Paymentsshield policy and what to expect when they are referred to them.

This leaflet can also be customised with your business logo and contact details, which can then be downloaded and shared with your clients





# CUSTOMER FACING VIDEOS



Paymentshield's customer facing videos are short and snappy explainers that cover important details regarding optional extras.

Each video explains the benefits of having these optional extras in place and how seeking advice about them, from a financial adviser, is important.

Advisers can share these videos with their clients to showcase the importance of including optional extras as well as highlighting the value of their advice.

# Customer videos

- [Home emergency](#)
- [Legal expenses](#)
- [Personal possessions](#)
- Accidental damage (coming in 2024, keep your eyes peeled)

# thank you.