



Let's Get Started!

First Day

- Email your customer list, letting them know about the change and benefits.
 - + Be sure to include the payment page link.
- Post on any business social accounts (LinkedIn, Facebook, Instagram, etc.)
- Send a company-wide email to all relevant employees, letting them know about the change, and to tell their insureds.
- Ensure your PayNow button is fully set up on your website
 - + (Not sure where to begin? Contact your account manager, and we will guide you.)
- Post an update similar to the launch email on any newsletters, site update sections or blogs
- Update your email signature badge with one of Client Toolkit examples

First Week

- Send a "Reminder" email to your customer list.
 - + Note - this can be the same email as before, just add "Reminder" to the subject line to keep it simple.
- Post another reminder on all relevant socials (LinkedIn, Facebook, Instagram, etc.)

First Month

- See if you can get a simple quote from your customers and share it on your website and social channels.

Remember, if you need any help along the way, feel free to reach out or access our Client Toolkit!

Client Toolkit



Schedule Meeting

