

# Client Centre

## Registration Email Tip Sheet



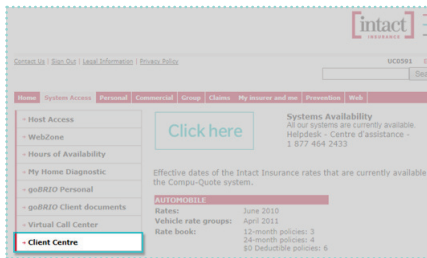
### Send your customers a link to create their Client Centre account!

In a few simple steps, you can manage sending your customers a registration email with a link to create their Client Centre account.

#### STEP

1

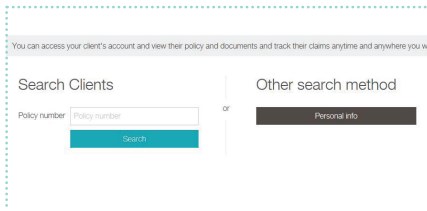
Click on the Client Centre link from the Broker Portal



#### STEP

2

Search for a customer



#### STEP

3

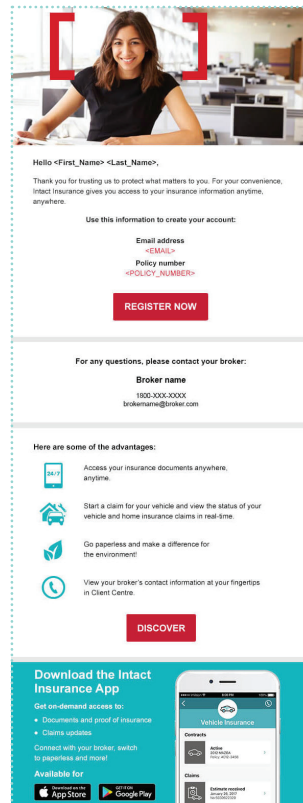
Click the link to send the customer an email. If there's no email address, you can add and save it before clicking the link – it's that easy!



When would you send your customers a registration email?

- **Renewal:** When contacting a customer to discuss their renewal be sure that they can access their policy online and send them the registration email.
- **Policy changes:** When a customer contacts you about a policy change, it's the perfect opportunity to let them know they can access their policy online, and send them the registration email.
- **New Business:** When you sign up a new customer with Intact, let them know they have the option to access their policy online, and send them the registration email the next day.

The following email template illustrates what the email to your customers will look like and all the benefits.



Personalized for each customer

Displays your brokerage name and contact information

Highlights the benefits of online access

Promotes the Intact Insurance App