

Insurance go-live website review checklist



You've invested in InvoiceCloud to simplify the payment process for your policy holders. To ensure you're maximizing your investment, the link to your payment portal (and any relevant payment information) must be easily accessible on your website.

Taking the time to make minor updates to your website can ensure you're creating a positive payment experience and attracting more policy holders. More policy holders that pay online means fewer mailed-in payments and reduced call volumes, saving you time and money.

Homepage

Your homepage should be simple to navigate to make it easy for customers to find your bill payment link and payment information. Make sure your homepage includes the following:

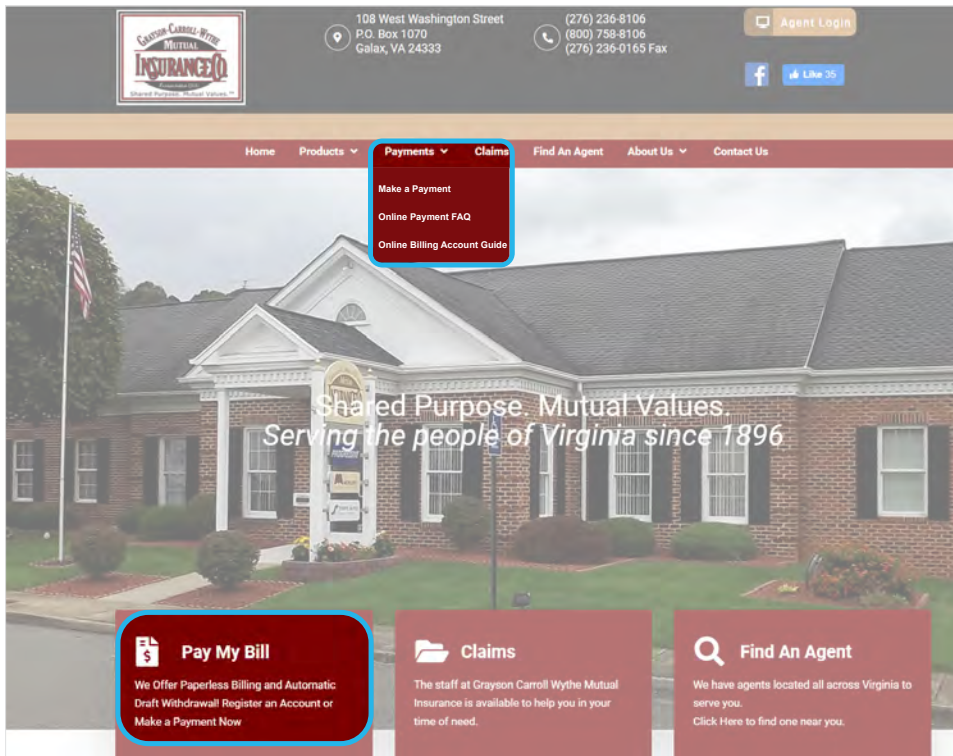
- ☐ Promotion of your new payment portal on your homepage ideally using graphics or a news update.

We recommend temporarily promoting your new portal on your homepage for 60 days after go-live.

- ☐ A button or link to your InvoiceCloud payment portal (accessible in two clicks or less) displayed high enough on the page so customers do not have to scroll to find it.
- ☐ Access to your payment portal or payments landing page in your navigation bar.
- ☐ Indexed search terms (if search function is available) that direct payers to the payment portal (Examples: *payment, pay bill, pay invoice, pay online*).



Complete the actions on this checklist to optimize your website and drive online payments.



Homepage example

Here's an example of an InvoiceCloud biller homepage that is well-optimized for online payments.

What we love

- Their website has an easy-to-find bill payment button directly on their homepage.
- Online payments are accessible to their customers in just **one click**.
- Additional features are displayed right on the homepage (*AutoPay, Paperless, and Registering an account*).
- How-to Guides are available on how to set up any self-service feature as well as registering an account.

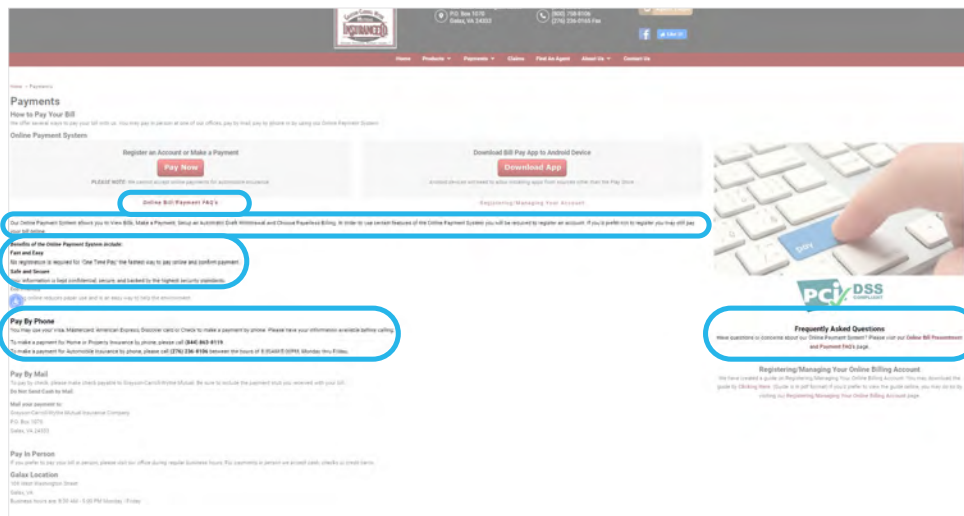


**One click
brings
customers
to online
payments.**

Payment landing page

Create a payment information landing page within your web site to share all the important information about online payments. Review your payment content to ensure it includes the following:

- ☐ A link to your InvoiceCloud payment portal.
- ☐ All available payment options (*Examples: online, IVR, pay-by-text*) with electronic payment options listed before in-person or mailed options.
- ☐ All available payment conveniences (*Examples: AutoPay, paperless, scheduled payments*).
- ☐ A link to payment related FAQs (*payment-specific FAQs can be found in the Marketing Resource Center*).



Payments landing page example

Here's an example of an InvoiceCloud biller payments landing page that is well-optimized for online payments.

What we love

- The payments page highlights the many benefits of online payments.
- IVR options are listed for a policy holder to make a payment.
- If customers need assistance. They can link directly to a payment-specific FAQ page in two separate places.

If you have individual agencies that accept payments through their website, these best practices should be applied to them as well.

QUESTIONS?

We're here to help. Please reach out at customermarketing@invoicecloud.com