Making Business Easy

Contact Preferences:
Giving you control over what your customer can see

You Said

"Our customers receive emails with new offers and are able to log in to My Account to accept or decline. We want to manage that message with our customers"

We know it's important that:

- ✓ You are able to manage the relationship with your customer

- ✓ You can control what information your customer is sent

- ✓ You are kept aware of new offers and can proactively manage that customer conversation

- ✓ You are given the opportunity to retain any business at risk of being cancelled

We Deliver

Great news! You can log in to OLPC and choose how we interact with you and your customers. It's simple and easy to do, and will give you increased control.

Tell Me More

Your default contact preferences are set as:

Correspondence Preferences

	Client ?	Agent Correspondence Address/Email ?	Agent Registered Address/Email ?	Administrator Email ?
General Correspondence ?	☑	☐	☐	☐
Offer Letter	☑	☐	☐	☐
Review Letters	☑	☐	☐	☐
Original Policy Documents	☑			☐
Lapse Notification		☑		☐

What Does This Mean To Me?

You will be sent lapse notifications to inform you of events where either a Direct Debit may have bounced or a policy may be at risk of being cancelled.

All correspondence, excluding lapse notifications, will be issued to your customer by email or post, depending on whether we have an up to date email address.

This includes:

- ✓ General correspondence: This includes items such as: Medical information requests, Direct Debit Letters, and Trust Letters.

Legal & General

✓ Offer Letter: This includes any counter offers which are a result of Checking Your Detail amendments. **If you do not want your customer do receive a counter offer email you will need to deselect this box.**
✓ Review Letters
✓ Original Policy Documents

If you want copies of any of the above correspondence then you will have to update your contact preferences. **Important: This needs to be updated for every master and sub agency number.**

How Do I Update My Contact Preferences?

Step 1:

When you log in to OLPC, click the 'Menu' tab in the top right hand corner

Step 2:

Select 'Contact Preferences'

Step 3:

Select your agent number and name from the dropdown list

Step 4:

Make sure you input your correct email address

Contact Details

Telephone Number (option[al])

Mobile Phone No (optional)

Fax No (optional)

Underwriting Basis: (optional)

◯ Interactive Only   ● Optional Static

E-mail Address

Repeat E-mail Address (optional)

Administrator E-mail Address (optional)

Additional Administrator E-mail Address (optional)

Receive emails on underwriting decisions?

● Yes   ◯ No

Selecting 'Yes' will mean you are sent emails once a decision has been made for an application

Correspondence Preferences

	Client ?	Agent Correspondence Address/Email ?	Agent Registered Address/Email ?	Administrator Email ?
General Correspondence ?	☑	☐	☐	☐
Offer Letter	☑	☐	☐	☐
Review Letters	☑	☐	☐	☐
Original Policy Documents	☑			☐
Lapse Notification		☑		☐

Ok

Tick the 'Agent Correspondence Address/Email if you would like to receive copies.

Lapse notifications will be defaulted for agent to receive.

Untick the customer boxes if you would like to stop this correspondence from being sent to your customers.

Important – Original Policy Documents must be sent to the customer

Legal & General