



4 Steps to get your
customers onto

Automated Payments

A guide for
Ezidebit clients



Get the most out of your Ezidebit investment

Save more time and money by using Ezidebit to its full potential

If implementing your Ezidebit software was a smooth process for you, you're probably already starting to see some improvements in your internal business efficiencies and a reduction in your operating costs. This is great news, as these improvements will soon have a flow-on effect to increasing your positive cash flow and ultimately increasing your profits.

However, if more than a couple of months have gone by and you're not really seeing a significant reduction in the amount of time you put into manual payments administration tasks (such as chasing late customer payments, tracking who has paid, counting cash and so on), you're probably wondering why this is the case.

**IF YOU DON'T HAVE ENOUGH CUSTOMERS
PAYING YOU BY DIRECT DEBIT, YOU'RE
RUNNING THE RISK OF ACTUALLY
INCREASING (RATHER THAN DECREASING)
THE TIME YOU SPEND ON MANUAL
PAYMENTS ADMINISTRATION TASKS.**

Transition more customers

Many of your customers will be aware of direct debit and the benefits it offers as they are probably already paying for some other service in their business or personal life by direct debit.

So the main thing you need to do is communicate this change. Educate your customers and explain that direct debit is now your only or preferred payment method.

Start Now

This guide is designed to help you confidently explain the benefits of direct debit to your customers. After reading this ebook you will be able to explain the process with confidence and answer:

- What is direct debit?
- Why does a business use direct debit?
- What does this mean for customers?
- How does a customer sign up?

You'll also be given 4 practical steps to help make the transition process as simple as it should be.

- 1. Read this guide**
- 2. Educate early, educate often**
- 3. Solve their payment problems**
- 4. Include new customers**



Explain your payments with confidence

What is direct debit?

Direct debit is a pre-authorised payment set to a fixed or varying amount to be paid by the customer to the supplier. It is important to remember that with direct debit, the customer is always in control of their spending and their payments.

Why does a business use direct debit?

Direct debit is all about cash flow and affordability. It increases efficiency and can help fund growth plans. The flexibility and trusted payments that Ezidebit provides has a clear and direct link to a business' cash flow.

What does this mean for your customers?

When you break your payments down into smaller amounts, purchases become more affordable. Direct debit saves time, is efficient and reduces late payment charges and awkward conversations about overdue bills.

What do your customers have to do to sign up?

Customers need to complete a DDR Form to get started. Once you have received the signed form, you can enter the customer into your Ezidebit Online account. As soon as you activate your customer in Ezidebit Online they will receive a Welcome Email from Ezidebit letting them know what to look out for on their bank or credit card statement.

[DOWNLOAD A SAMPLE
DDR FORM HERE](#)

How to explain a Direct Debit Request Form (DDR Form) to your customers

These 4 simple steps show you how to successfully fill out a DDR Form, so that your business can confidently show your clients how to complete their own DDR Form.

The screenshot shows the Ezidebit Direct Debit Request Form (DDR Form) for a new customer. The form is titled "DIRECT DEBIT REQUEST" and "NEW CUSTOMER FORM". It includes fields for Business Name, ABN/ACN, Business Reference, Customer Reference, Surname, Given Name, Mobile #, Email, Address, Suburb, State, and Postcode. A large "SAMPLE" watermark is overlaid on the form. To the right of the form, there are four numbered steps: Step 1, Step 2, Step 3, and Step 4, corresponding to the sections of the form.

Step 1 Your Details Ensure that your customer fills this out correctly with their details. The 'Customer Reference' field is for your business to select a reference to identify the customer. If no reference is selected Ezidebit will default this field for you.

Step 2 Debit Arrangement A 'Once Only Debit' can be selected for a single transaction or an initial fee that is different to the regular debit amount, such as a joining fee. 'Regular Debits' is for the ongoing debit, and the 'Frequency' is how often it is taken. 'Duration' is how many times your customer will be debited.

Step 3 Choose Your Payment Method Your customer needs to enter their preferred Credit Card and/or Bank Account details as their preferred method of payment. Please note that if both are provided Ezidebit will automatically take payments from the Credit Card.

Step 4 Authorised Agreement Please ensure that your customer reads the attached 'DDR Service Agreement' and signs the bottom of the DDR Form. This authorises Ezidebit to process your payment.

Educate early, educate often

As an Ezidebit client you have access to a variety of marketing material to help you transition your customers onto automated payments. This material is designed to educate consumers about Ezidebit, from our security standards to our trustworthy Financial Services License. You can choose to use some or all of the following:

- Welcome letters
- Customer FAQ brochures
- Sample fee change letters
- Posters
- Window decals

The earlier you can present your customers with information about Ezidebit and your new payment solution the easier it will be.

You can email a brochure to your customers before you sit down with them too. This kind of icebreaker will inform your customers of the new payment solution and remove any concerns of change. Remember, fear of change stems from not knowing what is on the other side. So educate your customers about direct debit and Ezidebit as soon as you can.



Solve their payment problems

Most people don't like paying bills late and most don't carry cash anymore. When you are talking to your customers about moving onto automated payments, start by identifying the issue (maybe they regularly tell you they don't have any cash on them, or they forgot to pay the bill?).

Once you have identified the issue, you have identified the need to solve that issue.

Remember that most of your customers will already be paying for a service with direct debit in their business or personal life. Remind them how easy that is, and how convenient it makes paying those bills. Your direct debit payment plan is no different. It's about convenient payment of a bill.



Include new customers (& staff!)

As your business grows and you attract new customers, it is important not to lose the benefits you have gained with your existing customers already on direct debit. So talk about direct debit and automated payments with all new customers to avoid resurgence in late payments, cash handling and lost time managing payments.

You can include any of the Ezidebit supporting documents you used in Step 1. Follow the steps to educate, present a solution and show the Direct Debit Request Form in any new customer communications, from welcome kits to prospectus or website signup forms.

Tip: Don't forget to keep this ebook as part of your staff training material



It's time to sign up!

Now that you're an expert on using Ezidebit Online and signing up your customers to your new automated payments, it's time to get out the pen and start signing up!

From here your action plan is:

Step
1

Print out enough copies of the Direct Debit Request Form for each customer (Keep these forms handy for every customer interaction)

Email or mail copies of the FAQ brochure to your customers. You can download the FAQs here.

Step
2

Arrange a meeting with each customer to discuss their transition to automated payments

Step
3

Keep a list of all of your customers and tick off each one that successfully transitions to automated payments.

Step
4

When you made the decision to use Ezidebit you had a need to automate your payments. As an Ezidebit client you're in the driving seat to make that change and to introduce your customers to the benefits of automated payments and direct debit plans. You can improve your efficiency one payment at a time.

Don't forget we are always here to help you!

**NO CASH
KEPT ON
PREMISES**

Ask us about the easier way to pay  ezidebit.

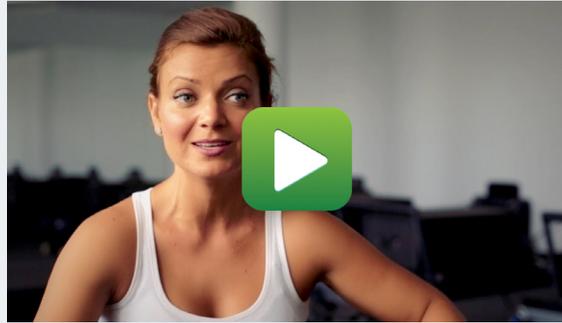
Other Resources

Videos:

How Morningside OSHC saves time



Pure Health clubs improve cashflow



Red Monkey: Innovative customer service



Think 24 find their competitive advantage

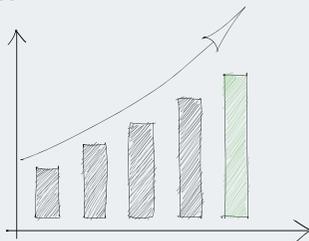


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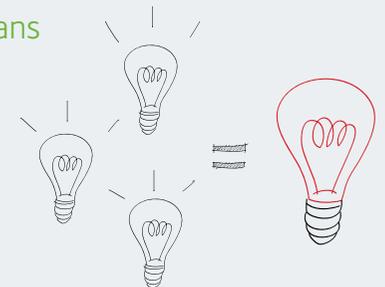
● Cash Flow



● Find Time



● Growth Plans





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