

ROADMAP TO RENEWAL



EXIT 1 Pre-Renewal

OPEN CLAIMS

Discuss Open Claims and Closure Strategy



BUDGET

Openly Communicate Budget Expectations for Future Bidding Purposes

RISK MANAGEMENT

Review Risk Management (Loss Control) Strategies to Help Mitigate Potential Claims



MARKET CONDITIONS

Discuss Current Market Conditions for Roofing Professionals and Optional Essential Coverages (Cyber, Pollution, E&O, etc.)

EXPERIENCE MOD

Provide an Analysis of Workers' Compensation Experience Mod (NCCI Worksheets)



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EXIT 2

Underwriting Phase

ACTION PLAN

Large Claim Description and Action Plan to Prevent Re-Occurring



UNDERWRITING DATA

Obtain Updated Projections and Underwriting Data to Submit to Partner Carriers

BUDGET OBJECTIVES

Discuss Budget Objectives to Match Roofing Clients' Expectations

