

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



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EXIT 3

Presentation of Solutions

PRESENTATION

Presentation of Solutions and Recommended Program and Discussion on Optional Essential Coverages



SECURE COVERAGE

Obtain Signatures to Secure Coverage

CERTIFICATES OF INSURANCE

Prepare Certificates of Insurance for Release After Binding Coverage



AUTO ID CARDS

Prepare Auto ID Cards After Securing Coverage