



# The Renewal Excellence Document

Client Renewal Summary and Process Record — A comprehensive framework powered by The Intelligent Agent to ensure consistent, confident renewal execution for your most valued clients.

# Section 1: Client Information

Document foundational client details and renewal parameters to establish a clear starting point for the renewal process.

Field	Input
Client Name	_____
Account Manager	_____
CSR	_____
Producer	_____
Date Renewal Initiated	_____
Effective Date	_____
Expiration Date	_____
Lines of Coverage	_____ _____ _____
Carriers	_____ _____ _____

## **Renewal Priority**

Price Stability  Coverage Expansion  New Market  Relationship Retention

# Section 2: Risk Review (120 Days Out)

The foundation of renewal excellence begins with comprehensive risk assessment. This critical phase establishes baseline understanding and identifies potential challenges or opportunities early in the renewal timeline.

Task	Notes / Attachments	Completed
Run Risk Assessment in The Intelligent Agent	----- -----	<input type="checkbox"/>
Review Client Exposure Checklist	----- -----	<input type="checkbox"/>
Pull loss runs and analyze trends	----- -----	<input type="checkbox"/>
Identify coverage gaps or operational changes	----- -----	<input type="checkbox"/>
Schedule Renewal Strategy Call	----- -----	<input type="checkbox"/>

## Client Comments or Changes

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# Section 3: Renewal Strategy (90 Days Out)

Strategic alignment with client objectives is the cornerstone of successful renewals. This phase transforms data insights into actionable renewal strategy through structured client dialogue.



## Client Engagement

Conduct strategic conversation using proven framework



## Objective Alignment

Confirm and document renewal priorities



## Documentation

Update systems and attach communications

Task	Notes / Attachments	Completed
Conduct client strategy call using Conversation Framework	----- -----	<input type="checkbox"/>
Confirm renewal objectives	----- -----	<input type="checkbox"/>
Discuss additional coverage recommendations	----- -----	<input type="checkbox"/>
Update CRM and renewal tracker	----- -----	<input type="checkbox"/>
Attach call recap email	----- -----	<input type="checkbox"/>



## Client Goal

Lower Premium  Maintain Coverage  Expand Coverage  Carrier Change

# Section 4: Marketing & Proposal Build (60 Days Out)

The proposal development phase transforms strategy into competitive options. Leverage carrier relationships and The Intelligent Agent's analytical capabilities to build compelling presentations that align with client objectives and market realities.

Task	Notes / Attachments	Completed
Send submissions to markets	----- -----	<input type="checkbox"/>
Generate Coverage Comparison in The Intelligent Agent	----- -----	<input type="checkbox"/>
Draft client proposal summary	----- -----	<input type="checkbox"/>
Send preliminary renewal update email	----- -----	<input type="checkbox"/>
Record carrier responses / quotes	----- -----	<input type="checkbox"/>

## Proposal Details

**Proposal Prepared By:** \_\_\_\_\_

**Date Sent:** \_\_\_\_\_

**Carrier Selected:** \_\_\_\_\_

# Section 5: Presentation & Binding (30 Days Out)

The presentation and binding phase is where strategic planning meets execution excellence. Ensure seamless transition from proposal to bound coverage through meticulous attention to detail and clear client communication.

01

## Present Proposal

Deliver comprehensive coverage recommendations with confidence

02

## Confirm Instructions

Secure binding authorization and validate coverage details

03

## Quality Control

Execute endorsement validation and policy review

04

## Client Communication

Deliver bound summary and express appreciation

Task	Notes / Attachments	Completed
Present proposal to client	----- -----	<input type="checkbox"/>
Confirm binding instructions	----- -----	<input type="checkbox"/>
Validate endorsements using Endorsement Validation Guide	----- -----	<input type="checkbox"/>
Send thank-you email with bound summary	----- -----	<input type="checkbox"/>
Update The Intelligent Agent notes with final terms	----- -----	<input type="checkbox"/>

### Binding Information

**Binding Date:** \_\_\_\_\_ **Bound By:** \_\_\_\_\_ **Policy Delivery Date:** \_\_\_\_\_

# Section 6: Post-Renewal Continuity

Renewal completion is not the end—it's the beginning of the next relationship cycle. Strategic post-renewal engagement strengthens client relationships, uncovers growth opportunities, and positions your team as trusted advisors for the year ahead.

Task	Notes / Attachments	Completed
Conduct Post-Renewal Review (call or email)	----- -----	<input type="checkbox"/>
Send educational content from Client Communication Vault	----- -----	<input type="checkbox"/>
Identify cross-sell or upsell opportunities using Prospecting Guide	----- -----	<input type="checkbox"/>
Record renewal notes and feedback	----- -----	<input type="checkbox"/>

## Retention Confidence

High  Moderate  At-Risk

## Next Action

Check-In  Coverage Review  Upsell Conversation

# Section 7: Performance Summary

Quantify renewal execution excellence through key performance metrics. This data-driven analysis enables continuous process improvement and provides leadership with visibility into renewal cycle efficiency and client satisfaction outcomes.

# 120

### Days to Execute

From initiation to binding completion

# 5

### Key Milestones

Critical checkpoints achieved

# 100%

### Client Retention

Successfully renewed accounts

Metric	Result
Renewal Initiated	_____
Proposal Delivered	_____
Renewal Bound	_____
Client Retained	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total Days from Initiation to Bind	_____
Client Satisfaction Rating	_____

## Notes for Leadership Review

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\_\_\_\_\_

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# Section 8: Supporting Documentation

Comprehensive documentation ensures transparency, facilitates knowledge transfer, and provides an audit trail for compliance and quality assurance purposes. Maintain organized records of all renewal communications and deliverables.

## **Coverage Comparison Document**

Side-by-side analysis of carrier options generated through The Intelligent Agent

## **Proposal Presentation**

Client-facing renewal recommendation deck with coverage highlights and pricing

## **Client Communications**

Complete email thread including pre-renewal, active renewal, and post-renewal messages

## **Endorsement Validation Summary**

Quality control documentation verifying policy accuracy and coverage completeness

## **Renewal Call Notes**

Detailed records of client conversations, decisions, and strategic guidance provided

# Section 9: Team Sign-Off & Accountability

Formal sign-off establishes clear accountability and confirms that all renewal protocols were executed according to agency standards. This multi-level review process ensures quality control and leadership visibility into renewal execution.

Role	Name	Date	Signature
Account Manager	_____	_____	_____
CSR	_____	_____	_____
Producer	_____	_____	_____
Leadership Review	_____	_____	_____

## Final Approval Notes

\_\_\_\_\_

\_\_\_\_\_

# The Intelligent Agent Advantage

The Renewal Excellence Document represents more than a checklist—it's a systematic approach to client service excellence powered by cutting-edge insurance technology. The Intelligent Agent serves as your closed-source digital mind, providing analytical capabilities, process consistency, and strategic insights that elevate every renewal interaction.



## AI-Powered Analysis

Leverage advanced algorithms to identify coverage gaps, analyze loss trends, and generate comprehensive risk assessments in minutes rather than hours.



## Process Consistency

Standardize renewal execution across your entire team with structured frameworks that ensure no critical step is missed regardless of account complexity.



## Growth Opportunities

Systematically uncover cross-sell and upsell possibilities through guided prospecting tools and client communication templates.

## Commitment to Excellence

# Every Renewal. Every Client. Every Time.

The Renewal Excellence System transforms routine renewals into strategic client retention opportunities. By following this comprehensive framework, you demonstrate professionalism, create predictable outcomes, and build lasting client relationships that drive sustainable agency growth.

### **Consistency**

Deliver the same high-quality experience regardless of team member or account size

### **Confidence**

Execute renewals with certainty using proven processes and technology support

### **Clarity**

Maintain transparency through documentation and structured communication

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*The Intelligent Agent – The Closed-Sourced Digital Mind for Insurance*

*This document is part of The Renewal Excellence System, designed to create consistency, confidence, and clarity in every client renewal.*

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