Personal Lines Stewardship Report

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Personal Lines Renewal Questionnaire

1. Client Information:

1. Have there been any significant life events, such as marriages, births, or university admissions, since our last check-in?
2. Are there any changes or additions to your home we should be aware of?
3. Have you acquired any high-value assets that may require additional coverage?
4. Have you added or sold any vehicles since our last update?
5. Are you considering any major changes in your lifestyle in the near future?

2. Coverage Review:

1. Are you satisfied with the coverage limits of your homeowner's policy, especially considering your home's contents and any renovations?
2. Are there elements of your auto policy you'd like to review, especially with newer vehicle models or tech enhancements?
3. How do you view your current umbrella liability limits in light of your assets and potential liabilities?
4. Given any changes in your financial or family situation, would you like to review your life insurance policies?

3. Risk Management:

1. Have you made any upgrades to your home's security or safety features?
2. Are you aware of available coverage options for specific regional risks like floods or earthquakes?
3. Considering the evolving auto tech landscape, are you interested in telematics or other policy features?
4. Have there been any changes in your health or lifestyle that may affect life insurance premiums or benefits?

4. Industry Trends & Education:

1. Are there personal risk trends you've observed or heard about that you'd like us to address?
2. Would you be interested in joining our annual online workshop on maximizing personal insurance benefits?
3. Are there specific concerns or topics you'd like us to focus on in upcoming educational sessions?

5. Service Feedback:

1. On a scale from 1 to 10, how would you rate our service responsiveness over the past year?
2. Were there moments you felt our service could have been improved or enhanced?
3. What additional services, communication methods, or support would you appreciate from us in the upcoming year?

6. Communication:

1. Satisfaction with Current Communication: On a scale from 1 to 10, how satisfied are you with the frequency and clarity of our communications?

1	2	3	4	5	6	7	8	9	10
☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

If not a 10, what aspects would you like improved?

2. Preferred Communication Channels: Which of the following do you prefer for our regular updates and communications?
   - ☐ Email
   - ☐ Mobile App Notifications
   - ☐ Phone Call
   - ☐ Regular Mail/Post
   - ☐ SMS/Text
   - ☐ Video Conferencing (e.g., Zoom)
3. Urgent Communication Preference: In the event of urgent or critical information, how would you prefer to be contacted?
   - ☐ Immediate Phone Call
   - ☐ SMS/Text Alert
   - ☐ Email
4. Feedback on Past Communications: Can you recall a specific instance where our communication stood out, either positively or negatively?

5. Newsletter & Updates: We periodically send out newsletters and updates on insurance trends, tips, and more. How often would you prefer to receive these?
   - ☐ Monthly
   - ☐ Quarterly
   - ☐ Bi-annually
   - ☐ Annually
6. Social Media Platforms: On which social media platforms are you most active and would prefer to see our content or updates?
   - ☐ Facebook
   - ☐ Instagram
   - ☐ Twitter
   - ☐ LinkedIn
   - ☐ YouTube
   - ☐ TikTok
   - ☐ TikTok
   - ☐ Other: ______________________________
7. Social Media Engagement: Would you be interested in participating in or viewing client testimonials, Q&A sessions, or live streams related to personal insurance topics?

8. Feedback on Digital Platforms: If you've interacted with our website or mobile app, how was your experience? Are there any features you'd like to see added or improved?

7. Referrals:

1. Satisfaction & Recommendation: On a scale from 1 to 10, how likely are you to recommend our services to a friend or family member? If not 10, what can we improve?
2. Referral Program Awareness: Are you aware of our referral program which offers benefits for both you and the person you refer?
3. Potential Referrals: Do you have friends, family, or colleagues who might benefit from a review of their personal insurance needs?
4. Referral Materials: Would you appreciate materials or information to share with potential referrals? This could be in the form of brochures, web links, or testimonial videos.
5. Feedback on Process: If you've referred someone to us in the past, how was your experience? Is there anything we could do to streamline or enhance the referral process?
6. Special Events: We occasionally host events or webinars to educate about insurance trends and provide tips. Would you be interested in inviting someone to join these sessions?