

# Artisan Contractors Stewardship Report Playbook



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## I. Client Information

1. Client Name:	
2. Contact:	
3. Contact Number:	
4. Email:	
5. Business Description:	
6. Current Policies:	

## II. Industry Trends

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### III. Loss History

### IV. Risk Profile Assessment

Operational Risks:

Property Risks:

Liability Risks:



## Cyber Risks:

## V. Risk Improvement Recommendations

### Training:

### Property Safety:

### Subcontractor Protocols:

### Cyber Security:



## VI. Coverage Review

## VII. Market Strategy for Renewal

## VIII. Renewal Proposal



## IX. Timeline

Carrier submissions:	
Carrier quotations:	
Proposal to client:	
Finalize renewal:	

## X. Service Plan



## Artisan Contractors Renewal Risk Assessment:

### 1. Client Information:

1. Have there been any changes in your business model or services offered?
2. Did you add or replace any significant tools or machinery this year?
3. Are there any plans to diversify into other trade services soon?
4. Are you considering hiring more employees or subcontractors in the upcoming year?
5. Have there been any significant business contracts or projects that would alter your risk profile?
6. How frequently do you upgrade or maintain your tools and equipment?

### 2. Business Operations:

1. Have there been any changes in your major clients or the type of jobs you take on?
2. Are there any new technologies or methods you've adopted?
3. How often do you work on commercial sites versus residential homes?
4. Are you involved in any multi-contractor projects?
5. Have there been any incidents or disputes with subcontractors?
6. Are you exploring any eco-friendly or green initiatives in your services?



### 3. Risk Management:

1. How do you ensure the safety of your employees or subcontractors on job sites?
2. What measures have you taken to prevent tool theft or equipment damage?
3. Are there standard protocols for dealing with on-site accidents or property damage?
4. How do you ensure that subcontractors adhere to safety and quality standards?
5. Have there been any client complaints or claims against your services?
6. How do you stay updated with industry regulations and compliance standards?

### 4. Insurance Coverage:

1. Were there any instances where a claim wasn't covered or you felt underinsured?
2. Do you feel the coverage for tools and equipment is adequate given their current value?
3. Have you considered professional liability insurance for potential errors in your work?
4. Are there any specialized tools or equipment that require individual coverage?
5. Given the vehicle accident, do you believe your auto coverage is sufficient?
6. Are you familiar with coverage aspects like 'Completed Operations' which protects against liability from past completed jobs?



## 5. Service Experience:

1. How satisfied are you with our service and the coverages provided?
2. Were there any concerns or areas of improvement you noted in our service?
3. How often would you prefer communication or check-ins from us?
4. Are there additional services or information sessions you'd be interested in?
5. Do you feel well-informed about the current risks and trends in the artisan contractor industry?
6. What are your future goals, and how can we assist in achieving them?