

Construction Company Stewardship Report



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Table of Contents

- I. **Client Information**..... 1
- II. **Renewal Strategy** 1
- III. **Timeline** 2
- Renewal Risk Assessment**..... 3
 - Understanding the Business..... 3
 - Asset and Property 3
 - Liability Considerations..... 3
 - Employee and Worker Safety 4
 - Contracts and Legal Obligations..... 4
 - Referral..... 4
 - Communication Preferences 4
 - Service Plan..... 5
 - Feedback..... 5

Construction Company Stewardship Report



I. Client Information

1. Client Name:	
2. Contact:	
3. Current Policies:	

II. Renewal Strategy

Market Evaluation:

Risk Assessment:

Carrier Evaluation:

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III. Timeline

120 Days Out:	
90 Days Out:	
60 Days Out:	
30 Days Out:	

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Renewal Risk Assessment

1. Understanding the Business:

1. Types of New Projects Undertaken:

2. Average Duration of Projects:

2. Asset and Property:

1. New Acquisitions of Equipment:

2. Security Measures for Equipment Storage:

3. Liability Considerations:

1. Recent Accidents:

2. Third-Party Involvements:

Construction Company Stewardship Report



4. Employee and Worker Safety:

1. New Safety Measures:

2. Training Programs:

5. Contracts and Legal Obligations:

1. Any New Contracts with "Hold Harmless" Clauses?

2. Surety Bonds:

6. Referrals:

1. Would you refer our agency to another construction company?

2. Potential Referral Contact:

7. Communication Preferences:

1. Communication Satisfaction Level:

2. Preferred Modes of Communication:

Construction Company Stewardship Report



8. Service Plan:

9. Feedback: