

Distributor Stewardship Report Playbook



Distributor Stewardship Report Playbook



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I. Client Information

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

II. Industry Trends



III. Loss & Incident Review

IV. Comprehensive Risk Profile

Supply Chain:

Inventory Management:

Transport Risks:

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Cybersecurity:

V. Risk Improvement Strategies

Inventory Security:

Driver Safety Programs:

IT Security Measures:

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VI. Coverage Review

VII. Renewal Strategy

VIII. Renewal Proposal

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IX. Timeline

X. Ongoing Service Commitment



Distributor Renewal Risk Assessment

1. Operations & Supply Chain:

1. Have there been any significant changes in your vendor relationships or supply sources?
2. Any new logistics partnerships or changes in shipping methods?
3. Have there been any expansions to new markets or product lines?

2. Inventory & Assets:

1. Any large-scale asset purchases like new warehouses or delivery vehicles?
2. Changes in your inventory volume or value?
3. Any automation or technology advancements in your inventory management?

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3. Risk Management:

1. Any incidents or near-misses that have caused concern?
2. Changes or updates to your security measures for physical or digital assets?
3. Employee training sessions on safety, cybersecurity, or other risks?

4. Coverage & Policy:

1. Have there been any coverage gaps identified in the past year?
2. Are there any new types of coverage you are considering?
3. Any planned changes in your deductibles or coverage limits?



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5. Communication Preferences:

1. What has been your preferred communication channel with us: email, phone, video meetings?
2. How would you rate the quality and timeliness of our communication?
3. Are you interested in receiving periodic industry updates or best practices through newsletters or webinars?

6. Referral Opportunities:

1. Do you belong to any industry associations where others might benefit from our services?
2. Any other businesses you work closely with that you'd feel comfortable introducing us to?
3. Would you be willing to participate in a case study or provide a testimonial?



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7. Service Experience:

1. How would you rate your overall satisfaction with our services?
2. Any specific instances where we exceeded or failed to meet your expectations?
3. What are your primary business goals for the upcoming year and how can we assist in achieving them?