

Farm & Ag Business Stewardship Report Playbook



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Table of Contents

- I. **Client Information..... 1**
- II. **Farm & Ag Industry Trends 1**
- III. **Loss & Incident Review..... 2**
- IV. **Comprehensive Risk Profile 2**
- V. **Risk Improvement Strategies 3**
- VI. **Coverage Review 4**
- VII. **Renewal Strategy & Vision..... 4**
- VIII. **Renewal Proposal 4**
- IX. **Timeline & Engagement 5**
- X. **Ongoing Service Commitment..... 5**
- Farm & Ag Business Renewal Risk Assessment..... 6**
 - Operational Insights..... 6
 - Sustainability & Environment..... 6
 - Risk Management & Safety..... 7
 - Coverage & Protection 7
 - Communication Preferences 8
 - Referral Opportunities..... 8
 - Service Experience..... 9



I. Client Information

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

II. Farm & Ag Industry Trends



III. Loss & Incident Review

IV. Comprehensive Risk Profile

Crop Vulnerabilities:

Livestock Concerns:

Equipment Reliability:



Labor and Operations:

V. Risk Improvement Strategies

Crop Diversification:

Livestock Health:

Equipment Maintenance:

Safety Protocols:



VI. Coverage Review

VII. Renewal Strategy & Vision

VIII. Renewal Proposal



IX. Timeline & Engagement

X. Ongoing Service Commitment



Farm & Ag Business Renewal Risk Assessment

1. Operational Insights:

1. Any significant changes in the size, crop types, or livestock numbers over the past year?
2. Introduction of new farming techniques or technologies?
3. Are there any upcoming major purchases or sales of assets or livestock?

2. Sustainability & Environment:

1. Implementation of new sustainable or organic farming practices?
2. Measures taken to address water usage, soil health, or pest management?
3. Plans to integrate renewable energy sources on the farm?



3. Risk Management & Safety:

1. Have there been any notable incidents or injuries on the farm in the past year?
2. Upgrades to farm infrastructure, storage, or equipment for safety purposes?
3. Training sessions or certifications achieved by you or your staff?

4. Coverage & Protection:

1. Reflections on the current coverage in light of the past year's experiences?
2. Thoughts on adjusting policy limits or exploring new coverages?
3. Awareness and interest in government-supported agricultural insurance programs?



5. Communication Preferences:

1. Preferred method of communication: emails, calls, in-person visits, or newsletters?
2. Satisfaction with our communication frequency and quality?
3. Would webinars or workshops on specific agri-topics be of interest?

6. Referral Opportunities:

1. Are you part of any farmer cooperatives, associations, or groups where our expertise might be valued?
2. Any peers or neighboring farms that might benefit from our services?
3. Willingness to provide testimonials or case studies detailing our collaboration?

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7. Service Experience:

1. How would you evaluate our understanding of your farm's unique needs?
2. Areas where we excelled or places for improvement?
3. Your primary goals for the upcoming year and how we can assist in achieving them?