

# Stewardship Report and Renewal Questionnaire for



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# Stewardship Report and Renewal Questionnaire For



Client:	
Introduction:	

## I. Performance Metrics

### Financials:

Total Premium Paid:	
Total Savings via Risk Management Initiatives:	
Total Claims Payout:	

## II. Service Metrics

### Certificate Requests Completed:

Number of request:	
Average Time for Certificate Requests:	

### Endorsement Requests Completed:

Number of request:	
Average Time for Certificate Requests:	

### Customer Satisfaction Metrics:

Customer Satisfaction Score:	
Net Promoter Score:	

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## III. How Do You Rate Our Service?

We strive for excellence in all that we do and would appreciate your feedback. Please rate the following on a scale of 1-10:

	1	2	3	4	5	6	7	8	9	10
Responsiveness:										
Knowledge and Expertise:										
Overall Service Quality:										

## IV. Coverage Review

### 1. Commercial Property Insurance:

Current Coverage:	
Recommendations:	

### 2. Commercial Liability Insurance

Current Coverage:	
Recommendations:	

### 3. Business Interruption Insurance:

Current Coverage:	
Recommendations:	

### 4. Workers' Compensation

Current Coverage:	
Recommendations:	

### 5. Commercial Auto Insurance:

Current Coverage:	
Recommendations:	

### 6. Cyber Liability Insurance:

Current Coverage:	
Recommendations:	

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## V. Risk Management Initiatives

## VI. Referrals

## VII. Renewal Questionnaire

1. What were your total sales over the last 12 months?

2. What was your total payroll over the last 12 months?

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3. Have there been any significant changes in risk profile, such as new types of products or services?

4. Have you opened any new locations?

5. Have there been any significant staffing changes, especially among key employees?

6. Are you considering expanding the business in the near future?

7. Were there any safety or security incidents that caused concern?

8. Have there been changes in assets that require adjustments in property insurance?

9. Any plans to acquire large or specialized equipment?

10. Expected budget range for insurance in the upcoming term?

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## VIII. Contact Information & Communication Preferences

Confirm or Update Contact Information:

Email:	
Phone:	
Address:	

Preferred Method of Communication:    Email    Phone    Other:

## IX. Next Steps

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## Closing Remarks

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Prepared by:	
Contact:	
Date:	