

# Lessor of Property Stewardship Report Playbook



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## I. Client Information

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

## II. Industry Landscape & Trends



### III. Detailed Loss History

### IV. Comprehensive Risk Profile

Property Maintenance:

Tenant Relationships:

Environmental:

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Cyber Risks:

## V. Risk Improvement Action Plan

Infrastructure:

Tenant Engagement:

Environmental Assessment:

Digital Safety:

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## VI. Insurance Coverage Deep Dive

## VII. Renewal Strategy and Forecast

## VIII. Renewal Proposal



## IX. Timeline

## X. Dedicated Service Plan



## Lessor of Property Renewal Risk Assessment

### 1. Property Portfolio:

- 1. Any new acquisitions or sales in the property portfolio?
- 2. Major renovations or upgrades in the past year?
- 3. Changes in tenant demographics, especially in commercial properties?

### 2. Business Operations:

- 1. How have occupancy rates trended over the past year for both commercial and residential units?
- 2. Any new partnerships or third-party service providers?
- 3. Adoption or consideration of smart building technologies?

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### 3. Risk Management:

- 1. Measures implemented after the recent water damage incidents?
- 2. Frequency of safety and infrastructure audits?
- 3. Cybersecurity protocols for tenant data and online transactions?

### 4. Insurance Coverage:

- 1. Any claims that were challenging or weren't adequately covered?
- 2. Feedback on the claims process and any areas for improvement?
- 3. Views on the current liability coverage given the recent incidents?

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## 5. Communication & Digital Engagement:

- 1. Preferred methods of communication: email, calls, video meetings?
- 2. Feedback on communication frequency and clarity?
- 3. Digital platforms or industry-specific forums you'd like to see us on?

## 6. Referral:

- 1. Know other property managers or owners who might benefit from our expertise?
- 2. Willingness to provide testimonials or case studies showcasing our partnership?

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## 7. Service Feedback:

1. Specific interactions that stood out over the last year?
2. Expectations and any additional services desired for the upcoming year?