

Retail Business Stewardship Report Playbook



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I. Client Information

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

II. Retail Industry Trends

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III. Loss & Incident Review

IV. Comprehensive Risk Profile

Store Operations:

Employee Training:

Digital Infrastructure:

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Supply Chain:

V. Risk Improvement Strategies

Security Augmentation:

Employee Workshops:

Infrastructure Review:

Online Safeguarding:

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VI. Coverage Review

VII. Renewal Strategy & Vision

VIII. Renewal Proposal



IX. Timeline & Engagement

X. Ongoing Service Commitment



Retail Business Renewal Risk Assessment

1. Operational Dynamics:

1. Any changes in store size, locations, or layout over the past year?
2. Introduction of new product lines or discontinuation of any?
3. Have there been shifts in primary suppliers or manufacturers?

2. Digital & E-commerce:

1. Evolution in your online sales metrics compared to in-store sales?
2. Any new e-commerce platforms or technologies adopted?
3. Experience with digital payments and cybersecurity measures?

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3. Risk Management Updates:

1. Recent security enhancements or loss prevention measures?
2. Employee training programs or workshops conducted?
3. Safety protocols for both employees and customers, especially in light of public health concerns?

4. Coverage Feedback:

1. Any coverage limitations experienced in the past year?
2. Reflections on the claims process and its outcomes?
3. Thoughts on current policy limits and potential adjustments?



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5. Communication Preferences:

1. Preferred mode of communication: emails, calls, in-person meetings, webinars?
2. How would you rate our communication frequency and clarity?
3. Feedback on our newsletters, updates, and advisories?

6. Referral Insights:

1. Know of other retailers or business peers that might benefit from our specialized services?
2. Would you be willing to provide a testimonial or participate in a case study highlighting our partnership?

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7. Service Experience:

1. Areas where our service met or exceeded expectations?
2. Any areas of improvement or additional services you'd like to see?
3. Your objectives for the upcoming year and how we can best support them?