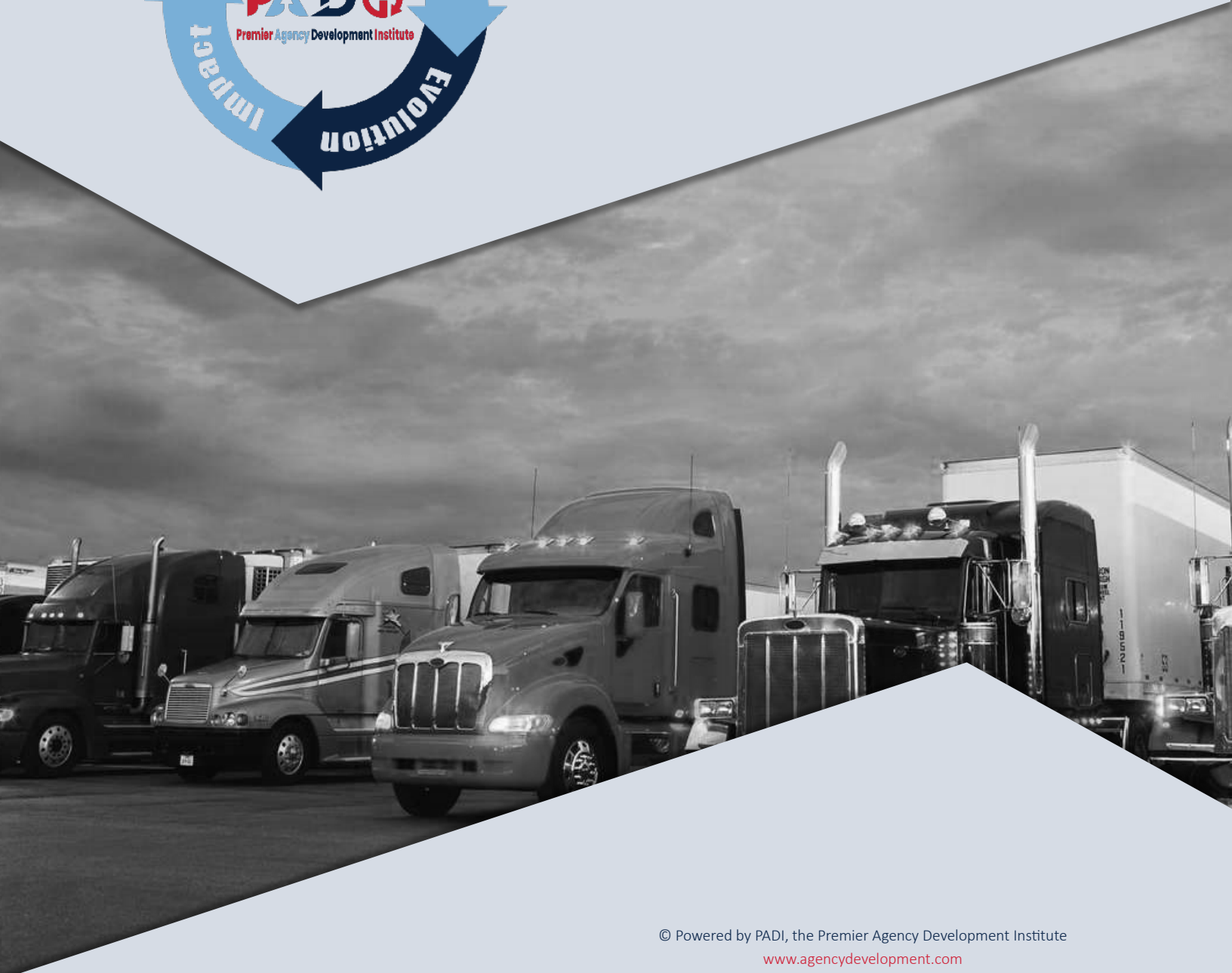


Transportation/Trucking Company Stewardship Report Playbook



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I. Client Information

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

II. Industry Landscape & Trends

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III. Detailed Loss History

IV. Comprehensive Risk Profile

Operational:

Cargo:

Fleet Maintenance:

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Cyber:

V. Risk Improvement Action Plan

Maintenance Protocols:

Diversify Suppliers:

Product Quality Assurance:

Cybersecurity Measures:

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VI. Insurance Coverage Deep Dive

VII. Renewal Strategy and Forecast

VIII. Renewal Proposal

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IX. Timeline

Carrier submissions:	
Carrier quotations:	
Proposal to client:	
Finalize renewal:	

X. Dedicated Service Plan

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Transportation/Trucking Renewal Risk Assessment:

1. Client Updates:

1. Any recent partnerships or mergers that might impact the fleet size or type of cargo?
2. Have there been changes in key managerial positions, especially within logistics or operations?
3. Feedback on our previous year's service and any areas of improvement?

2. Business Operations & Fleet:

1. Any updates on vehicle additions, sales, or decommissions?
2. Initiatives towards driver health, safety, or upskilling?
3. Insights into recent logistics technology integrations or plans thereof?
4. Feedback or concerns related to specific routes or rest stops?

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3. Risk Management Innovations:

1. Any new security protocols implemented, especially concerning cargo safety?
2. Have there been investments in predictive maintenance or IoT for fleet management?
3. Plans or pilot projects related to autonomous trucks?

4. Insurance Coverage:

1. Specific incidents or claims that raised concerns about the current coverage?
2. Feedback on the claims process and areas of enhancement?
3. Thoughts on extending coverages in areas like cyber or increasing existing limits based on operational changes?

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5. Referrals:

1. Are there peers in the industry facing similar challenges who might benefit from our expertise?
2. Would you be open to providing a testimonial based on our service, to help us assist more in your industry?

6. Communication & Digital Engagement:

1. Preferred communication channels: Direct call, email, text, or other platforms?
2. Feedback on our responsiveness and communication frequency?
3. Are there digital platforms you'd like to see us more active on? E.g., LinkedIn, industry-specific forums, or newsletters.
4. How do you rate our clarity and effectiveness in communicating industry changes, risks, or opportunities?

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7. Service Feedback:

1. Key touchpoints that made a difference last year and expectations for the upcoming year?
2. Suggestions for improving our engagement and understanding of your business nuances?