

## Renewal Satisfaction Scorecard

	form to rate the quality of services you have received from your current agent	SCORE
(1 = Non-existent/No process; 10 = High Quality/Exceeds Expectations)		
1)	My agent met with me to discuss our renewal strategy at least 90 days	
	before my renewal date.	
2)	My agent identified insurance companies that would be competitive	
	and communicated the plan to approach those companies.	
3)	My agent provided me with the underwriting data they provided to	
	the insurance companies and gave me an opportunity to offer input.	
4)	I was given the opportunity to interact with the underwriters	
	reviewing my business	
5)	The renewal process was initiated and completed in a timely fashion.	
6)	My agent provided me with me insurance policies in a timely fashion	
7)	My agent provided me with a clear, concise risk management action	
	plan.	
8)	My agent provided me with a detailed claims report and an action	
	plan to deal with any remaining open claims.	
9)	During the course of our last policy period, my agent provided me	
	with the risk control support my company needs, both in person and	
	with the necessary formal policies and procedures.	
10)	My agent was able to succinctly show me exactly what they were able	
	to do for my company over the last year in the form of a formalized	
	report.	
	TOTAL SCORE	

If your score is 80 or lower, we need to talk. If your score is between 81-90, it may benefit you to have a conversation with us. If your score is 91-100, call your agent and thank them for doing an excellent job!