



Renewal Satisfaction Scorecard

Use this form to rate the quality of services you have received from your current agent (1 = Non-existent/No process ; 10 = High Quality/Exceeds Expectations)	SCORE
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!