



# RESEARCH & DISCOVERY

## BREAK THE ICE

Conversation Starters



Can you tell me a little more about your journey? How the business started, etc?

What are your specialty products and services? What is your bread & butter?

What are some challenges you are facing?

What are some opportunities that you see for your business this year?

What is the vision for your company in the next 2-5 years? Stay the course, scale, downsize?

What are you looking for in a Property & Casualty Consultant?

What does your process for evaluating the Property & Casualty Insurance look like?

How would you rate your overall insurance experience, 1-10? What would make it a 10?

What are some areas that you would like more help on from your P&C provider?



*Category 1*

## POLICY REVIEW

Key Coverage Missing

Inadequate Limits

Notable Exclusions

Program Ideas

Benchmark Pricing

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## Category 2 LOSS PREVENTION STRATEGIES

### General Safety

In-House Specialist  
In-Person Training

Safety Videos  
Toolbox Topics

Incentive Programs  
Safety Handbook

### OSHA

OSHA Logs Platform  
Written Programs  
Tailored Trainings  
Mock OSHA Visit  
Certifications  
Penalty & Fine Consultation

### Fleet

Fleet Safety Policies  
Vehicle Maintenance Program  
Telematics  
Distracted Driver Training  
DOT Compliance



## Category 3 COST CONTAINMENT STRATEGIES



In-House Claims Specialist  
Claims Handling Playbook  
Semi Annual Claim Reviews  
WC Valuation Date Reporting

Modmaster Claims Analytics  
RTW Policy  
Nurse Triage Utilization  
Captive & Loss Sensitive Solutions

## Category 4 HR SUPPORT

T.I.C. Client Resource Coordinator  
Select Access Client Portal  
Culture & Leadership Training

HR Hotline  
HR Tools  
HR Compliance Resources



## Category 5 CURRENT VENDORS

### Carrier

Claims Handling  
Loss Control  
Billing  
Audits  
Pricing

### Agency

Service Team Structure  
Certificates & Service Requests  
Claims Handling  
Resources

### Agent

History  
Renewal Process  
-Marketing Approach  
-TSM  
-Early Renewal Delivery  
Risk Management Strategy  
-Risk Profile Priorities  
-Stewardship Report  
Married/Unbreakable Relationship?

