

**Back to Basics: A Step-by-Step Approach to Managing Your Insurance Program**

Wednesday, July 21 @ 9:00am

**AGENDA**

**Introduction**

- Who is Lawley Construction?

**Overall Management of the Insurance Program**

- General overview
- Basic roles and expectations
- Information gathering
- How the marketing process works

**Insurance Program Renewal Process**

- 120-day renewal process/timeline
- The process from the account manager, account executive, and producer's point-of-view
- What should you expect from your agent

**Managing Day-to-Day Servicing After the Renewal**

- Expectations & turnaround time
- Certificates
- Bid spec reviews & quoting costs
- How to prepare for an audit

**Hiring Sub-Contractors**

- Agreement forms
- Risk transfers
- Sub-contractor certification review
- Claim reviews

## **Loss Control**

- What the Loss Control Team does
- What our best clients are doing for loss control
- What you should be doing if OSHA is involved
- What to do or look for in regards to safety in your work area

## **Claims Management**

- The importance of proper information gathering at the first report of a Workers' Comp or General Liability claim
- We will look for possible 3<sup>rd</sup> parties to transfer the risk to via possible contracts/agreements that are in place
- In Workers Compensation, the frequency and severity of claims will hit your experience which will have an effect on the amount of premium you will have to pay
- We will look for trends at particular loss locations so Risk Management can work with you as needed

## **Wrap-Up: What Does the Partnership with Your Broker Look Like?**

- Are they doing all the things we just discussed?
- Standards that you should expect from a broker