**Renewal Review Overview**

**Step 1** – Generate List  
Acct Mgrs: On the first of the month, Using Reports – Sales & Retention – Personal Lines Renewals (60 days out-for 30 day increments), Run, copy/paste to excel, Clean to just your alpha and give to your Client Care Specialist for Step 2

**Step 5** - Open client on one screen and your CP Review Word Doc on other and begin review. Review the topics with client and note responses in the Review word doc. Upon completion of the call, copy paste that into your log note See example for formatting etc.  
Create/Update Client Tag: Ren Rev Done 5/20

Contact with client is Made (immediate answer, appointment, etc)

Once you and client have connected proceed with conducting Review

If no word from client, send Email Ren Rev #2 and you can close suspense.

If no contact is made - Leave Msg and Reset suspense for 7 days

**Step 4** – When suspense date arrives, reach out to client to do review.

**Step 3 –** When suspense comes up, Acct Mgr will review and if applicable sendTrigger Email: Ren Rev #1 in email templates & Set Follow up to call client 7 days out.

**Step 2 –** Set Suspenses   
Client Care will use report to set suspense for Acct Mgr for about 40 days out from renewal for Acct Mgr to do trigger Email