ONE CARRIER · ONE CONVERSATION · CLEAR NEXT ACTIONS

Carrier Huddle Worksheet & Scorecard

MINDS ON FIRE

Use a 30-minute carrier conversation to confirm appetite, service expectations and next steps. Write facts and commitments; leave unknowns visible. Use aggregate agency information, not client names or policy details.

Agency / preparer _____

Carrier / contact _____

Date / next huddle _____

Five-part huddle agenda

Ask and clarify	Evidence, answer and follow-through
1. Appetite What business fits now? What has changed?	Classes / territory / exclusions / effective date
2. Speed What turnaround is realistic? Who handles an escalation?	Expected timing / named contact / backup
3. Changes How and when will appetite or renewal changes be communicated?	Notice channel / date / affected business
4. Claims Where do service issues get stuck? What is the escalation route?	Process / contact / next update
5. Commitments What will each side do next, and by when?	Action / accountable owner / due date

Commitment scorecard

Status key: Unknown / Agreed / Action needed / Closed with evidence. No summed score: an unknown stays unknown.

Action / evidence reference	Owner	Due / status

Before the next conversation

Confirm the written recap with the carrier. Keep a named owner and due date for each open item. Carrier relationships do not replace a licensed review of the client's coverage needs or guarantee acceptance, price or a claim outcome.