

Program Transition Checklist

- ☐ Strategic Plan with expectations and commitments clearly outlined with the Carrier
- ☐ Project Plan with agreed timelines/clear accountabilities
 - ☐ Underwriting
 - ☐ Systems
 - ☐ Claims
 - ☐ Billing/Collections
 - ☐ Marketing
 - ☐ Risk Engineering
 - ☐ Contracts
- ☐ Empowered Project Manager on both sides
- ☐ Conduct deep-dive into UW forms/coverages
- ☐ Focus on the impact to the Customer
- ☐ Transparency being practiced
- ☐ Address anything that deteriorates Trust
- ☐ Identify and address cultural differences
- ☐ Devote adequate resources (like it is a merger)
- ☐ Be flexible throughout the process
- ☐ Regular meetings being held on multiple levels
- ☐ Plan ways to develop deeper relationships and blow off steam