

Homeowner's name(s)

Meeting date:

Address

Suburb

City

Claims Specialist: (name)

Arrow Project Manager: (name)

Attendees:

- Homeowner(s)
- Manager (insurer)
- Other staff if appropriate (insurer)
- Facilitator (Breakthrough Facilitation)

Introductions

These notes capture the information about who is at the meeting, their roles and backgrounds. If there are frustrations disclosed which the homeowner needs their insurer to hear, these are also noted.

Issues

Notes under these headings are thorough. We try to capture what is raised and discussed as it happens in the meeting and we are clear about who says what.

These notes can be viewed almost as a contract in the sense that we can follow up with anything that was agreed or discussed that is noted. For the homeowner, it's important that these notes are clear because often they will use them to make sure progress continues or to remember what actions were going to happen and when.

Other issues discussed

Other concerns which come up during the course of the discussion are also noted. Although we stick to the agenda, there are always other important aspects which come up and we let that happen as long as the homeowner is happy with that.

Next steps

This is a very quick summary of anything that needs to be recalled that doesn't fit into the table below. Often it can outline what the next steps are for the homeowner when they are facing a new phase of their claim settlement.

Actions points

This table is where the real gold is because it clearly articulates every action which was agreed, who is the person responsible for ensuring it happens and a realistic timeframe in which that will be achieved. The actions could be for the insurance staff or they could be for the homeowner. We make sure the timeframes are realistic so that the homeowner can be certain their expectations are valid. We also use the table to follow up on progress - is everyone on track to reach the timeframes?

<i>Action</i>	<i>Person responsible</i>	<i>Timeframe to completion</i>