



## Risk Control

# Virtual Client Consulting Services

To maximize flexibility and convenience for policyholders, CNA is among the first carriers to offer Virtual Consultative Service Meetings without an in-person visit. All it takes is a virtual conference using selected video conference technology. CNA's [Virtual Capabilities](#) and [Digital Solutions](#) are designed to support the needs of today and tomorrow by allowing CNA Risk Control to provide consultative services virtually, especially for businesses in remote areas.

Our Risk Control consultant will work with the client to schedule the meeting and any needed consultative services. A customized agenda and virtual tour instructions will be provided in advance, and photos and documents may be collected through a secure online platform.

Here's what can be expected for a Virtual Consultative Service Meeting:

### 1. Welcome & Overview

- Audio, video and overall technology check
- Introductions and plans for the meeting

**2. Virtual Engagement** Prior to the virtual engagement, our Risk Control consultant will work with the client to establish the scope and intent of the meeting, mutual objectives and any necessary logistics (technology or other). The service engagement may include, but is not limited to:

- On-boarding meeting
- Service plan development
- Review of prior losses
- Stewardship meeting

- SORCE® presentation or training
- [Remote Worker Office Ergonomics Assessment](#)
- Data Gap Analysis

**3. Virtual Tour (If Needed)** Through selected video conference technology, we can provide further services to evaluate key exposures and controls through a video facility tour.

**4. Closing Conference** At the conclusion, we will debrief, thank the client and discuss the following:

- Consultative services summary
- Overview of follow-up communications
- Discussion of next consultative service steps

To learn more about how to manage risks and increase efficiencies, please contact CNA Risk Control at [RiskControl@cna.com](mailto:RiskControl@cna.com) or visit [cna.com/riskcontrol](https://cna.com/riskcontrol).