

Policy Renewal Management

Banking, Finance & Fintech

Document type: Plan / SOP / strategy / guide · Generated 13 Oct 2026

This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Builds a policy renewal management system for an insurance distributor — a renewal calendar, a reminder sequence (timing, channel and message), lapse prevention, and a review-at-renewal step to check adequacy and upsell suitably. Use this to keep policies in force and clients covered.

Purpose of this tool & output

Keep policies in force and clients covered

How the output is used

Use the tool to keep policies in force and clients covered with timely renewal management.

Important cautions

AI-generated system; follow IRDAI conduct and consent rules.

Companion documents

- Insurance Advisory Framework
- Policy Comparison Helper
- Claim Assistance Guide
- IRDAI Distribution Compliance
- POSP / Agent Setup Guide
- Insurance Proposal Writer

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.