

# New Customer Onboarding Checklist

The Redwoods business model is built on deep relationships—meaning you can expect more from us than your typical insurance company. To take full advantage, however, we need your engagement. Below is a checklist of action steps for your organization to take to get the full advantage from our services.

## Welcome Email Items

### Update Your Contacts

- Update your organization's contacts [online](#).

### Know Your Account Team

- Save your Redwoods Consultant's email and phone number to your contacts (this is your primary point of contact).
- Review other Redwoods contacts and share them with relevant staff.

## Onboarding Webpage Items

**Start Here:** [Welcome to Redwoods](#)

### Claims

- Bookmark: [Understanding Our Claims Process](#)
  - View our *Claims Welcome Kit*
  - Watch our *What to Report and When to Report* video
  - Watch our *How to Use Our Online Incident Report Form* video
  - Watch our *What to Expect After a Serious Incident* video
  - Download our *When Bad Things Happen* one-pager
  - Read through our FAQs
- Bookmark: [Report General Liability, Auto, Property and Directors & Officers' Incidents](#)
  - Review how to report an incident

### Billing

- Sign Up: [Online Bill Pay](#) (not available for customers who pay through their broker)

### Online Learning and Resources

- Review: [Online Learning at Redwoods](#)
  - Sign up for The Redwoods Institute
    - Bookmark: [The Redwoods Institute](#)
    - Request login credentials
    - Set up an orientation with Danica Co
    - Download and view our full Course Catalog
  - Review additional free resources

## C&F Connect

- Review: [See Your Loss Data with C&F Connect](#)
  - Download and email the signed privacy agreement
  - Request access to C&F Connect

## For Worker's Compensation Customers

- Review: [Welcome to Workers' Compensation](#)
  - Save the email and phone number of your WC Redwoods point of contact, Monika Valentine
- Bookmark: [Report a Workers' Compensation Claim](#)
  - Review how to report a WC claim
  - Download state-specific claim kits

## For Directors & Officers (EPLI) Customers

- Review: [Welcome to Directors & Officers](#)
  - Save the email and phone number of your D&O Redwoods point of contact, Paige Bagwell
  - Review the *Disappearing Retention* infographic