

CAT Workflow Overview



Your process should outline the steps you will take before, during and after a large loss. This is part 2 of 3 worksheets that cover the plan, the process and the people.

List remediation, restoration, and repair resources available: (ex. air movers)

How do I intake jobs
when there is an influx of
claims?

How do I track and
document jobs?

How do we triage jobs?

What if my credit cards
don't work?

Catastrophe Process Worksheet



What's my path to
collecting payment on
each claim?

What if I can't get fuel?

How will we
communicate if cell
phones are down?

Do we have local partnerships in place?

For a large loss what is
our plan to handle it?

Do we have a standard
referral rate and process?

Who deals directly with
the insurance company
for updates, changes, or
payment collection?

Catastrophe Process Worksheet



What is our plan for:

- ☐ Temporary Labor
 - Technicians & Supervisors
- ☐ Administrative Staff
 - Safety Staff Member
- ☐ Clerk of the Works
 - Project Managers/ Coordinators
- ☐ Sales & Support
 - Generators & Electricity
- ☐ Air movers & Dehumidifiers
 - Gas, Fuel
- ☐ Tools, tracking systems, consumables
 - PPE, logo wear
 - Specialty Tools/EQ
- ☐ Hotels / Accommodations
 - Food
- ☐ Transportation - Buses
 - Debris removal/ Disposal