

Agency AI tool inventory

Could you list every AI tool that touched a client file this quarter? Most agencies carry the answer in their head, not on paper — and an E&O renewal application can ask cold.

WHAT COUNTS

“AI tool” means more than a chatbot. Comparative raters, drafting assistants, AI-generated coverage summaries, and client chat all touch the file the same way. If it assists a quote, a draft, a comparison, or a client reply, it belongs here.

COMPLETE ONCE

Agency / office	Inventory owner (one person)
Date started	Next refresh (recommend quarterly)

COLUMNS ON THE GRID

- 1 **Tool name** — what your team calls it day to day
- 2 **Vendor** — the company you pay or contract with
- 3 **What it touches** — quoting · drafting · comparison · client chat · other
- 4 **Human review before the file?** — Y/N and who reviews
- 5 **Vendor owner** — who renews the contract / login
- 6 **Last reviewed** — date the row was checked
- 7 **Notes** — prohibited uses, account type, or open questions

Ownership rule. One person should own this list — not whichever team adopted the tool. A producer who adopts a tool independently is the usual reason an inventory goes stale within a quarter.

Scope. Authored editorial practice from The Renewal Report. Not a survey of E&O application language, not a legal requirement, and not a substitute for counsel or your carrier’s form. Full argument: therenewalreport.com/desk/260927-play-build-an-ai-tool-inventory-befor

Inventory grid

One row per tool. Add sheets if you need more than eight.

Tool name	Vendor	What it touches	Human review before file? (Y/N + who)	Vendor owner	Last reviewed	Notes / prohibited uses

When done: file with your AI / vendor records. Refresh before renewal season — or sooner when a producer adopts a new tool.

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