



Insurance Mediation Preparation Checklist

1. Gather Documentation:

- Policy documents
- Declarations page
- Endorsements and amendments
- Correspondence with the insurance company
- Claims history and payment records
- Repair estimates and invoices
- Photographic evidence of damages
- Any independent assessments

2. Review Your Position:

- Understand the terms and conditions of your policy
- Clearly outline your claim and supporting evidence
- Identify the key issues in dispute
- Determine your desired outcome

3. Create a Summary Statement:

- Concisely summarize the claim, including facts and timelines
- Highlight critical points that support your case
- Prepare a list of questions or arguments for the mediator

4. Know the Opposing Side:

- Research the insurance company's stance and past mediation outcomes
- Understand their points of contention regarding your claim

5. Develop your Strategy:

- Determine your negotiation limits (minimum acceptable settlement)
- Think about potential compromises or trades
- Consider how you can present your case effectively



6. Prepare for the Mediator:

- Gather background information on the mediator if possible
- Understand their mediation style and preferences
- Prepare to provide any additional information the mediator may need

7. Plan for the Mediation Session:

- Choose your representation (attorney or advocate)
- Discuss strategies and roles with your legal team
- Prepare to listen and respond to the other party
- Practice your presentation to ensure clarity and confidence

8. Logistics:

- Confirm the date, time, and location of the mediation
- Arrange for any required technology (e.g., video conferencing tools)
- Ensure all parties are aware of the mediation details

9. Emotional Preparation:

- Prepare mentally to remain calm and professional
- Be ready for possible emotional challenges
- Settle on a positive mindset for negotiation

10. Follow Up:

- Plan to follow up post-mediation regardless of the outcome
- Review the mediation results with your team

Additional Tips

- Remain open-minded and flexible during mediation.
- Focus on creating a collaborative atmosphere.
- Be patient; mediation can take time.