

CUSTOMER ACQUISITION ASSESSMENT

IMPROVING CUSTOMER SERVICE

ARE YOU PREPARED TO ACHIEVE SUSTAINABLE GROWTH?

Getting customers in today's competitive market space is increasingly difficult. Pricing and product are important, yet they usually only level the playing field. Sales methodologies and selling programs improve your odds, but effective and efficient processes, capabilities, and functions can be the key to bringing it all together for significant and sustainable growth.

THE RESOURCE PRO APPROACH

ReSource Pro's Customer Acquisition Assessment provides an objective and thorough review of the processes, capabilities, and organizational functions that impact the growth of your customer base. We go beyond pricing, product, selling, or servicing methodologies—equipping you with the insights you need to maximize your resources.

We take a collaborative approach to each engagement, working closely with your staff to gather essential input and develop a customized improvement plan. This approach also promotes acceptance and ownership for managers and front-line employees—an often-overlooked step that is vital to the success of any change initiative. Lastly, the use of process analysis techniques assures organizational alignment

and confirms that business processes and technology needs are properly integrated.

Part of what makes our assessment such a valuable tool for senior leaders is the use of our exclusive Views—targeted analyses that focus on individual components of a healthy customer acquisition environment. Each View stands alone as its own category, yet they work together to provide an objective picture—and a fresh perspective—of your sales organization.

Core Views include:

CAPABILITIES

- Technology
- Channels
- Productivity
- Data
- Business Intelligence
- Predictive Analytics

ORGANIZATION

- Marketing
- Engagement
- Underwriting
- Contracting
- Servicing

PROCESS

- Market Segmentation
- Lead Development
- Application Development
- Contracting
- Installation

KEY DELIVERABLES

Our Customer Acquisition Assessment can be tailored to meet your needs—either as a comprehensive review of every area that touches your sales operations or as a tightly-focused review of specific areas. In either case, we equip your organization with:

- An objective assessment of your current state with comparison to industry best practices
- Recommended improvements to achieve optimal results
- An implementation plan for incorporating those recommendations

WHAT ARE THE BENEFITS?

In order to manage your sales function most effectively, it's important to start with a clear picture of the resources, processes, and technologies already in place. Our Customer Acquisition Assessment brings these elements into view, then provides clear solutions to help you achieve:

- An estimated 5–10% incremental growth of your top line
- Improved sales-cycle time and producer productivity
- Enhanced efficiency and customer service



WHY RESOURCE PRO?

ReSource Pro consultants are seasoned insurance professionals whose deep industry experience gives our clients an informed, unbiased view of the people, processes, and technologies that impact customer acquisition operations. Our firsthand industry expertise, combined with our proprietary Views, gives us unmatched insight into the problems you face and puts us in a unique position to help you grow your customer base and achieve a high level of profitable customer retention.

To learn more, visit resourcepro.com/carrierconsulting

FOR MORE INFORMATION

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