

BUSINESS PROCESS MANAGEMENT

POLICY SERVICING | RETAIL



PROVIDE BEST-IN-CLASS SERVICE

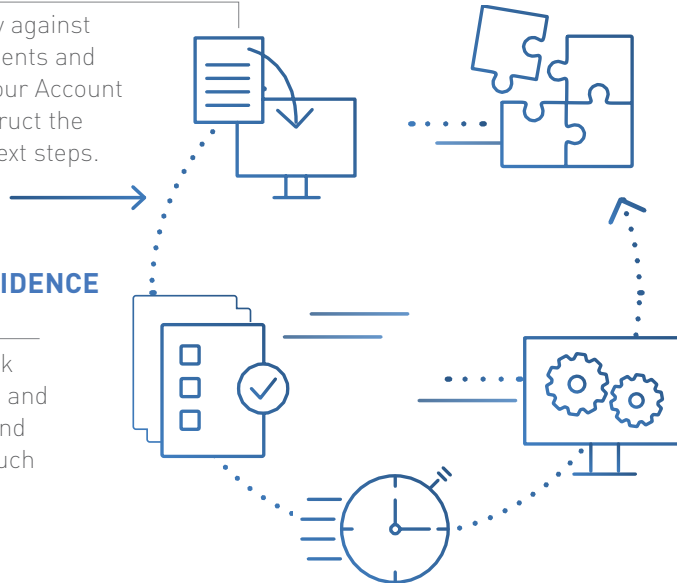
Support your Account Managers throughout the policy lifecycle with ReSource Pro's Policy Servicing. You can count on our meticulous attention to detail, plus consistent and timely client communication—allowing your Account Managers to handle coverage-related issues and explore new opportunities with clients.

RESOURCE PRO POLICY SERVICING

Great customer experience depends on seamless policy servicing. Peace of mind starts with confidence in the accuracy, speed, and transparency that your service provides.

1. POLICY CHECKING

We'll check each policy against relevant source documents and flag any variation for your Account Manager, who can instruct the team to perform any next steps.



2. CERTIFICATES & EVIDENCE OF INSURANCE

We can take care of bulk renewal certificate jobs and handle daily requests and other documentation such as Auto ID cards.

3. PROACTIVE FOLLOW UP

If you bind subject to anything, we'll actively follow up and assure you don't miss deadlines for underwriting requests, inspection recommendations, affidavits, payment notifications, and more.

5. HANDLE THE MUNDANE

We'll take care of miscellaneous requests, such as updated loss runs, online rating, responding to accounting inquiries, requests for copies of previously released documentation, and more.

4. CHANGE REQUESTS & ENDORSEMENTS

We'll set up change requests in your system and actively follow up for the endorsement, or process the request in the carrier's system. Endorsements can be retrieved, verified, corrected, and issued with an invoice.

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HERE'S WHY IT MAKES BUSINESS SENSE

ELEVATES CUSTOMER CARE – By delegating processing tasks, Account Managers are able to spend more time with your customers, understanding and fulfilling their needs.

REDUCES E&O RISK – By accurately servicing your policies in a timely manner, you'll be able to significantly reduce or even eliminate E&O exposure.

IMPROVES TIMELINESS & ACCURACY – Clearly defined and proven procedures, as well as a highly skilled staff, ensure the process moves quickly and is done accurately. Discipline to updating the agency management system will create downstream efficiency.

ELIMINATE BACKLOGS – Too much risk can be hidden in backlogs. Give peace of mind to yourself, your staff, and your clients.

BUSINESS PROCESS MANAGEMENT MODULES

When you delegate critical administrative tasks to ReSource Pro, you'll be able to optimize their execution, leading to improved customer service and satisfaction. Moreover, you'll give your staff more capacity for revenue-generating activities.



EXPERIENCE YOU CAN COUNT ON

1.1 M 
policies checked
in 2018

4.5M 
number of policy
discrepancies
identified in 2018

Approximately
450,000 
endorsements
processed for
retailers in 2016

FOR MORE INFORMATION

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