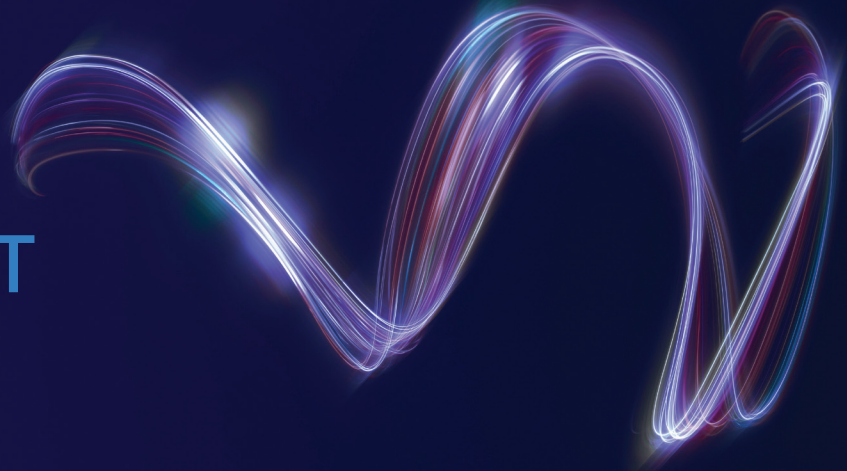


# BUSINESS PROCESS MANAGEMENT

RENEWALS | RETAIL



## MAXIMIZE RENEWAL OPPORTUNITIES

Account retention is the lifeblood of agency growth and profitability. Designing processes that drive excellence across service standards maximizes your renewal opportunity.

## RESOURCE PRO RENEWALS

ReSource Pro Renewals service establishes a framework to initiate renewals in an efficient and timely manner. This allows your staff to focus on client needs and ensure they are adequately covered. Moreover, the elevated quality of service will help you increase not only the number of renewals, but also their value.

### 1. INITIATE RENEWAL PROCESS

We'll run and format expiration lists to help Account Managers identify any required marketing effort, and make sure that key activities are completed on time.

### 2. PREPARE SUPPORTING MATERIAL

Your ReSource Pro team will retrieve and organize information (loss runs, renewal notices, etc.), facilitating Account Managers' assessments. Renewal applications can be prepared, or additional optional quotes can be retrieved.

### 3. UPDATE AGENCY MANAGEMENT SYSTEM

All along the way, your team will assure that your agency management system data is accurate, and update any system notes or diaries to aid your monitoring of the renewal process.

### 6. SUPPORT THE DECISION

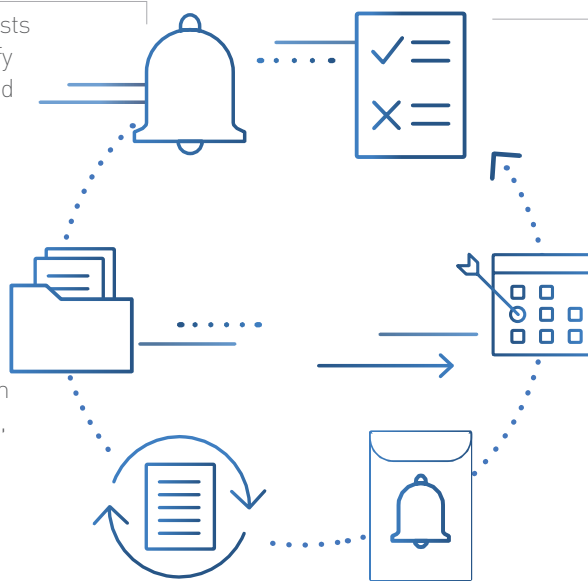
We'll prepare all relevant documents. If you don't get the account, we'll send a close-out letter to the prospect, and update your systems to improve future prospecting.

### 5. FOLLOW UPS AND REMINDERS

Your team will make sure that your carrier partners have all the required documentation by sending follow-ups to Account Managers.

### 4. SET UP RENEWAL PACKET

Your team can help prepare schedules, summaries, and cert holder lists for formal renewal meetings.



## HERE'S WHY IT MAKES BUSINESS SENSE

**INCREASED PROFITABILITY** – You'll spend less time and money keeping business, increasing the value of individual accounts.

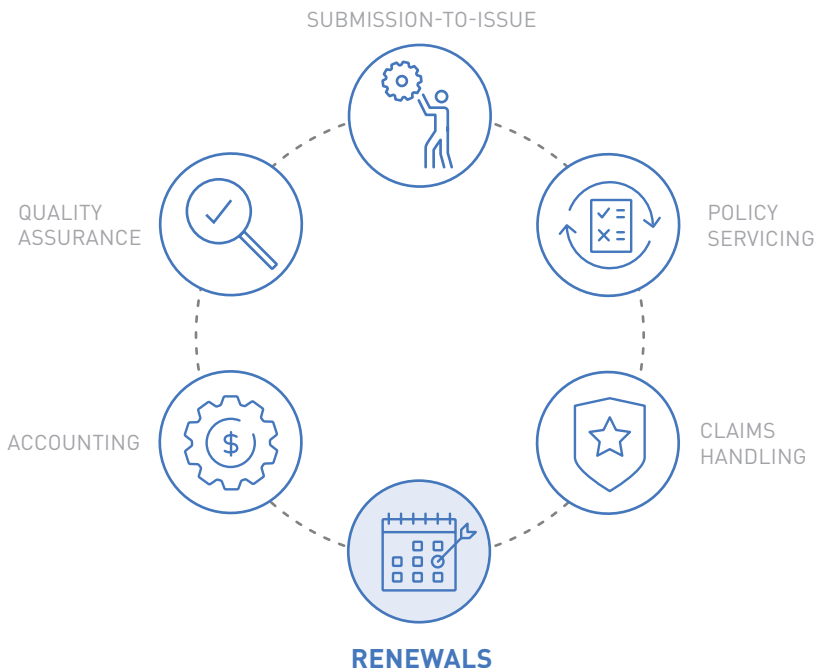
**HIGHER RETENTION RATES** – Establishing a proactive pre-renewal process improves account retention and reduces the burden to replace lost business.

**IMPROVED RELATIONSHIPS** – When we take over a task, your experienced staff can focus on customer-facing activities. Moreover, we reduce turnaround times with our super-efficient processes – all contributing to excellent customer service.

**STRONGER CARRIER RELATIONSHIPS** – Insurance companies appreciate profitable partners.

## 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

# 334,000

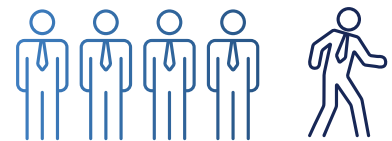


policies renewed annually

The insurance industry has the **highest customer acquisition costs** of any industry



Reducing customer defections by 2% per year



is equivalent to cutting costs by **10%\***

\*Independent Insurance Agents of Dallas:  
<http://www.iiadallas.org/default.asp?page=75>

## FOR MORE INFORMATION

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