

# CASE STUDY | RETAIL

## BUSINESS PROCESS MANAGEMENT

### IF AT FIRST YOU DON'T SUCCEED—TRY AGAIN!

#### ABOUT THE CUSTOMER

Thomas H. Heist Insurance Agency serves customers in Southern New Jersey and the surrounding tri-state area from five locations. They provide an extensive range of products including personal, commercial and group benefit lines.

#### THE CHALLENGE

Like many agencies and businesses today, Thomas H. Heist faced the perpetual challenge—increase growth and decrease costs. President and agency namesake, Thomas Heist, felt that operations played a significant role in addressing this challenge.

Much of the agency's business comes from the New Jersey shore area. This often requires the use of surplus lines carriers which can lead to a more complicated and longer administrative process with redundant tasks. The agency was training new hires to process this business and then advance them to more evolved roles, which created a continuous cycle of retraining and additional agency expense. Additionally, the agency wanted to seek ways to improve operational efficiency.

#### THE SOLUTION

Agency owner Thomas Heist and Vice President of Operations Dolores Schroyer concluded that they would designate an outsourcing partner to assist with some of their processing. Heist and Schroyer looked at several Business Process Outsourcing vendors. The choice was down to ReSource Pro and another company.

The agency chose the other company because there was no minimum commitment, but the outcome was less than favorable. The agency was spending more time on corrections, and the situation was causing more problems than it was solving. The staff lost all confidence in the vendor and the decision was made by management to pull the plug on the relationship.

However, Heist and Schroyer still felt that the key to solving their challenges was to fortify their staff with an external team. The decision was made to contract with ReSource Pro. In contrast to their previous experience, ReSource Pro engaged as a true partner, with the goal of overall operational improvement.

The Operations Advisory team started by reviewing the agency's processes, making the transition a smooth one. Due to the lack of staff confidence from the former experience, they decided to 'tip toe' into the relationship and started with Policy Checking for their commercial lines. "Within three months it was so successful, even our commercial lines team was happy with the results—we had total buy-in from the team," said Schroyer. "The ReSource Pro team found and corrected inaccuracies to improve data integrity."



THOMAS H. HEIST  
INSURANCE AGENCY

#### CUSTOMER PROFILE

Property and Casualty Insurance Agency

#### WEBSITE

[www.heistinsurance.com](http://www.heistinsurance.com)

#### LOCATION

Five locations throughout New Jersey, USA

#### BUSINESS NEED

Improve the efficiency of operations

#### SOLUTION

ReSource Pro Operations Business Process Management

#### THE IMPACT

- Agency significantly improved accuracy of policies and eliminated backlogs
- Staff was able to transition to higher-value work, increasing revenue-per-employee and job satisfaction
- Service levels improved



With early success, the agency began transferring more processes within the policy lifecycle, including: Certificates of Insurance, Endorsements (from start to finish and across all departments), Audits, Create Change Requests, Document Retrieval, Binder Checking and more. Moreover, with the right partner, they were able to realize the benefits and improvements they sought. Their staff recognized the value as well, as they were able to focus on higher-value opportunities.

## THE RESULTS

In only 14 months the Thomas H. Heist Agency has made a significant transformation to their operations and are working with ReSource Pro to further improve operations. Here are the measurable results they've achieved so far:

- Lowered the cost associated with administrative employee attrition
- Reduced risk exposure by improving accuracy of policies and eliminating backlogs
- Improved service levels by streamlining processes and giving staff more time to service clients
- Increased employee retention, employee satisfaction and value. The agency has been able to move two talented employees into higher-value roles.

After what Heist describes as an amazing visit to the agency's ReSource Pro service delivery team in China, he now understands how dedicated they are to the success of his business, and said "I used to think of them as a vendor, but found they care for us like dedicated employees. It has changed my mindset 180 degrees."

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*DOLORES SCHROYER  
THOMAS H. HEIST AGENCY  
VP OF OPERATIONS*

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## ABOUT RESOURCE PRO

ReSource Pro brings to the insurance industry tools, technology and strategic services that enable profitable growth through operations excellence. Headquartered in New York, ReSource Pro's global service centers address client operational needs around the clock. Recognized as an industry thought leader and listed as one of Inc. 500/5000 Fastest Growing Private Companies annually since 2009, the company is renowned for its focus on innovation, service excellence and trusted partnerships, and its unique productivity platform for insurance operations. Over 5,000 ReSource Pro employees provide dedicated support to hundreds of insurance organizations, consistently achieving a 97% client retention rate for over a decade.

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## FOR MORE INFORMATION

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