

Managed Services for insurance agencies & brokers

Bridging your agency's applications and profitability

Is your agency leaving revenue on the table?

Insurance agencies often work with dozens — even hundreds — of carriers, and with that scale comes significant complexity. Fragmented systems, inconsistent practices for managing access to carrier systems, and limited visibility into critical operations can quietly erode profitability and limit performance. Outdated system configurations, unsecured access points, and the challenges of managing data transitions during mergers and acquisitions only add to the security risk and inefficiency.

Managed Services

From optimizing your core systems to securing access to sensitive information and streamlining data transitions, we help your agency run smarter, safer, and more profitably.



System administration and support

Optimize your agency's core software systems to maximize profitability:

- Systems configurations and maintenance
- Troubleshooting and issue resolution
- Customized solutions that leverage the full capabilities of your software
- Security and compliance



Carrier access management

Increase security and carrier access oversight to sensitive information:

- Standardized processes for managing carrier credentials
- Secure password management
- Audit trail and oversight of access to carrier systems
- Streamlined process for system onboarding



Conversions and data governance

Accelerate value and mitigate risks with M&A strategy and end-to-end project management:

- Change management and strategic planning
- Detailed data mapping
- Quality assurance and data integrity
- Systems integration

For more information

visit us: resourcepro.com

call us: 888.577.7552





Daily policy download support

Enhance the download process with a centralized, streamlined user experience, managing suspense, and driving continuous improvement.



Agency reporting

Make data-driven business decisions and gain efficiency through access to reliable information, reports and dashboards.



Training

Upskill your staff to drive more efficiency with a live agency management system, new hire, and refresher training across all lines of business.

ReSource Pro Managed Services for agencies and brokers builds on the legacy of Helix Agency Services, acquired in 2024. Today, it combines proven retail insurance expertise with scalable, managed technology services to help brokers and agencies operate smarter.

ABOUT RESOURCE PRO

Focused exclusively on the insurance industry, ReSource Pro is the trusted partner insurance organizations rely on to optimize performance, streamline operations, and drive growth. Serving 1,800+ carriers, brokers, wholesalers, and MGAs, our global team of 10,000+ employees operates at the critical intersection of people, technology, data, and operations to help clients deliver sustainable results. With a 96%+ client retention rate for over a decade, ReSource Pro is a recognized market leader in insurance process and workflow optimization, data and technology services, and strategic evolution. In 2024, ReSource Pro earned a spot on the Inc. 5000 list of fastest-growing companies, making it the only insurance industry company to achieve this distinction 15 times.

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