



# DRIVING PROFITABLE GROWTH

The background of the lower half of the page is a dark blue gradient. On the left side, there are several overlapping, glowing light trails in shades of yellow, green, and blue, creating a sense of motion and energy.

CORPORATE OVERVIEW

# SET THE PACE OF CHANGE

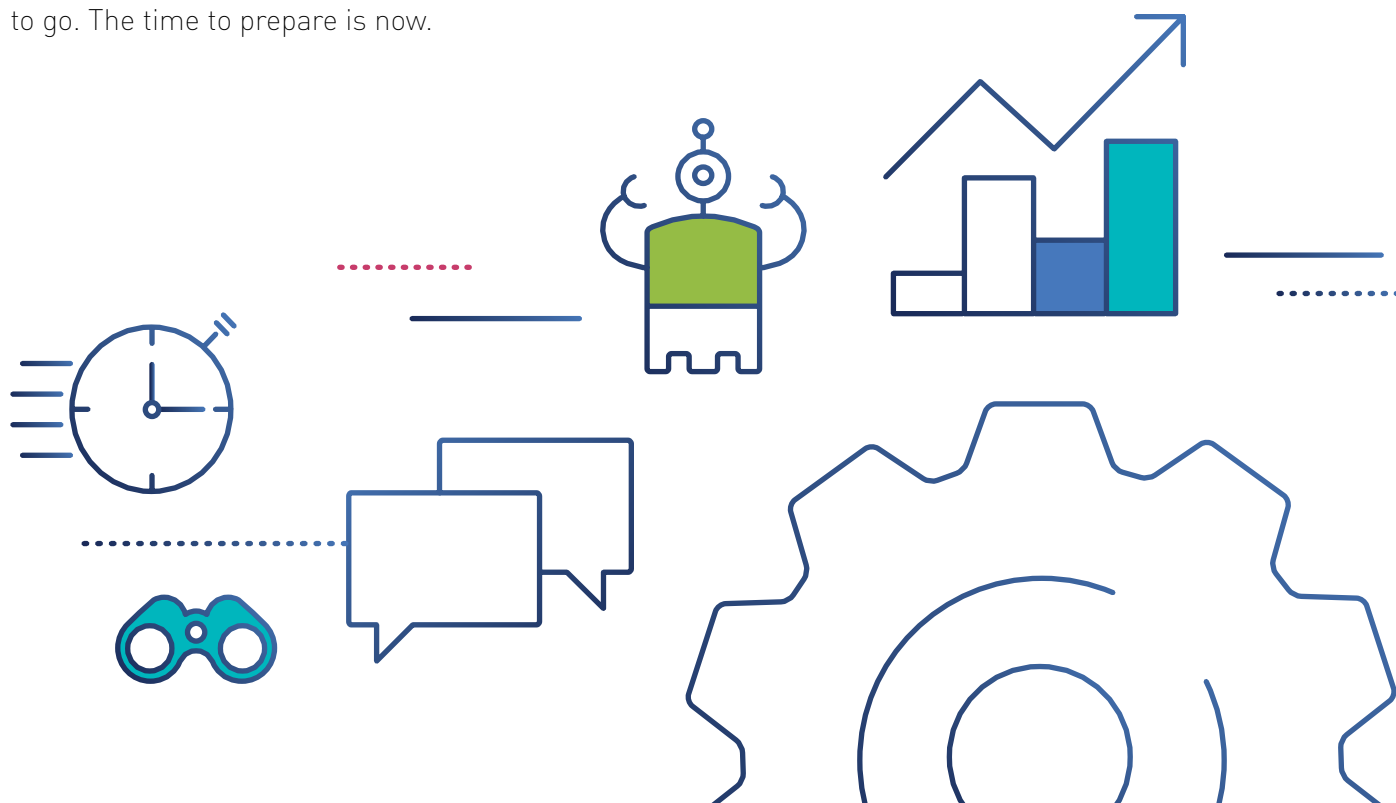
Staying ahead of the curve is how industry players become industry leaders. In times of change, innovating isn't always easy to do. The rules of business are changing, and the insurance industry is no exception. Disruptive technology, changes to our distribution models, new industry players, and market demands are all pushing the industry in different directions.

Whether you're embracing change, feeling pressured by it, or both—it's happening now, and those who capitalize on these shifts will be the leaders of today and tomorrow.

How well you operate and sell your business are going to be determining factors in how well you fare in our rapidly evolving future. This is a future filled with changing competitors, data, networked devices, AI-powered analysis, and so much more. While these elements will impact our businesses slowly at first, the pace will only increase over time. It's time to think about whether your current operations and sales will get you where you need to go. The time to prepare is now.

“ I DIRECTLY ATTRIBUTE OUR TRANSFORMATIONAL GROWTH AND SUCCESS TO OUR PARTNERSHIP WITH RESOURCE PRO. WE VALUE THE UNIQUE COMPLEMENT OF RESOURCES THEY PROVIDE. ”

*Bob Hanna, CIC, AFIS,  
President, Concorde General Agency*



# INTRODUCING THE POWER OF INTEGRATED SOLUTIONS

At ReSource Pro, we take the risk out of tackling your most ambitious challenges and lead you to more profitable outcomes. We've done it for hundreds of insurance organizations for over 15 years.

Whether you're driving growth, profitability, or scale, your business challenges aren't just a tech problem. And they're not just talent problems, process problems, or data problems. They're all of the above—complex challenges that need complex solutions. In short, they're integration problems. You need a solution that brings all the elements together to solve your most complex business objectives.

**THAT'S THE POWER OF INTEGRATED SOLUTIONS.**



## NEW BUSINESS

Accelerate growth by prioritizing high-value submissions.



## ACCOUNTING

Gain a trusted partner with automation capabilities to ensure accuracy.



## CLAIMS

Win client loyalty with speed and accuracy while minimizing losses.



## RENEWALS

Increase retention rates through best-in-class renewals management.



## POLICY SERVICING

Reduce the cost of policy servicing while improving quality and turnaround times.



## CUSTOM

Tackle challenges unique to your organization.

# FROM CUSTOMER SERVICES TO INNOVATION

Going beyond processing, we're looking to transform operations with services and solutions that ensure the relevancy of your insurance organization well into the future.



## INSURANCE EXPERIENCE CENTER

The Insurance Experience Center (IX Center) provides world-class service experiences to your clients, no matter how small they may be. Increase the profitability of these accounts while boosting customer loyalty and retention rates.



## INNOVATION LAB

Addressing a changing industry, the Innovation Lab is where we apply our best resources, greatest minds, and clients' knowledge in order to ensure your relevancy into the future.



## EMPLOYEE BENEFITS SOLUTIONS

The demand for high-touch customer service in the EB space has never been higher. Focus on your clients as we improve your processes and reduce your administrative workload.

# OUR PRODUCTIVITY PLATFORM

The four practice areas that make up our unique productivity platform are designed to work together to maximize the impact on your operations and sales.

Each area contributes to achieving operational excellence while providing you and your teams the capacity and resources to deliver outstanding service and differentiated sales—both key to maintaining and growing your business. ReSource Pro empowers your teams to think seriously and strategically about the future.



## OPERATIONS OPTIMIZATION

Aligning your business objectives to your operations, making them easier to attain and with greater profitability.



## BUSINESS PROCESS MANAGEMENT

Optimizing and delegating processes and workflows to improve your customer service, as you free up your people to focus on higher-value work.



## TALENT PERFORMANCE

Providing programs that develop and empower your people to do more for your organization and themselves.



## ANALYTICS

Gaining a competitive edge with insights that allow you to maximize the potential of your business.

# OPERATIONS OPTIMIZATION STRATEGY

With experts in insurance operations, Lean Six Sigma and leading methodologies, we align your business objectives to your operations. Pick a track that works for you:

## OPERATIONS DIAGNOSTIC

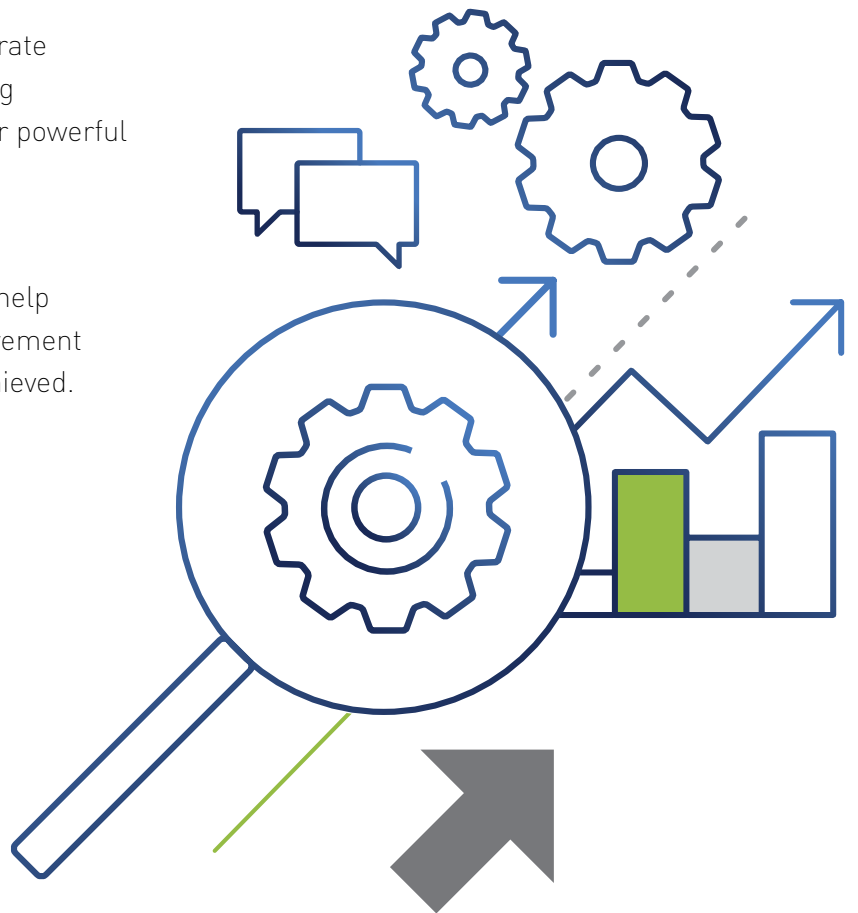
Through interviews, process observations, and review of your operational data, we provide a benchmarked diagnostic of your operations.

## LEAN PROCESS IMPROVEMENT

Based on the diagnostic results, we collaborate with you to identify areas where streamlining workflows and eliminating waste can deliver powerful efficiencies and ROI.

## CUSTOM SOLUTIONS

We work collaboratively with your teams to help design and implement the operation improvement recommendations to ensure results are achieved.



# BUSINESS PROCESS MANAGEMENT PROCESS

Optimize and delegate workflows to improve your customer service while also freeing up employees' time for higher value work and sales.

## SUBMISSION-TO-ISSUE

Increasing submission performance with efficient qualification and rating, proactive quote management, applying consistency and standardization to the binding process, and ensuring all details are covered.

## POLICY SERVICING

Allowing your staff to focus on higher-value work.

## CLAIMS HANDLING

Proactively handling claims, resulting in improved outcomes for your clients.

## RENEWALS

Increasing retention with more efficient processes, focused attention, and consistent service delivery.

## ACCOUNTING

Increasing consistency and timeliness, allowing your staff to focus on financial analysis rather than bookkeeping.

## QUALITY ASSURANCE

Reducing E&O risk and regulatory issues through standardized, timely processes.

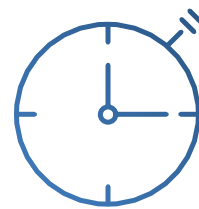
## RESULTS WITH IMPACT

The improvements below illustrate the results we've delivered during specific client engagements.

6,746



Number of backlogged processes eliminated for client in 6 months

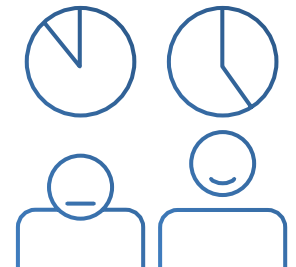


70%

Improved turnaround time for New Business Policy Issuance

57%

Reduction in policy checking times



# TALENT PERFORMANCE

## PEOPLE

Develop programs in sales effectiveness, leadership, and productivity that empower your people to do more for themselves and your organization.

### IMPROVING FRONT LINE EMPLOYEE PERFORMANCE

Transform your staff into insurance professionals through a variety of skill-building programs, such as: Insurance Fundamentals, Effective Business Conversations, Presentation Skills and more.

### BUILDING HIGHER-PERFORMING TEAMS

From recruiting and onboarding talent to your organization; to improved communication and collaboration within and across existing teams; to managing change and re-allocating talent to new roles, we provide programs that cover the lifecycle of your organization.

### INCREASING LEADERSHIP CAPABILITIES

Being an effective leader means recognizing your natural strengths, and complementing that talent with learned skills. We help your leaders build capability through combinations of workshops, tools, and work processes in areas such as: Problem Solving Processes, Performance Management, Delegation, Coaching, Talent Planning and more.

“RESOURCE PRO HAS CREATED LEARNING OPPORTUNITIES FOCUSED ON THE NEEDS OF INSURANCE ORGANIZATIONS AND PROFESSIONALS – THEY ARE MOST INTERESTED IN HELPING ME AND MY BUSINESS BECOME MORE EFFICIENT AND PROFITABLE.”

*Vice President, Operations, Early, Cassidy & Schilling, Inc.*





# ANALYTICS DATA

Our analytics products capture and analyze the most important KPIs impacting your revenue, giving you valuable knowledge, insights, and strategies.

## POLICY INSIGHTS

Checking policies is just the first step. Capture policy data that provides insight into sources of error, drivers of endorsement costs, and the exposure each carrier partner is generating from policy errors.

## CARRIER INSIGHTS

Allows you to understand, track, and manage your carrier contracts to promote maximum alignment and results.

## CUSTOMIZED SOLUTION TRACKS

ReSource Pro offers specific solution tracks based on the operational goals and priorities of your teams. We'll customize these solution tracks to meet your unique organizational needs, including:

- INCREASE PRODUCTION CAPACITY
- IMPROVE CLIENT RETENTION
- ACHIEVE SERVICE EXCELLENCE
- INTEGRATE ACQUISITIONS
- AGENCY MANAGEMENT SYSTEM TRANSITIONS
- SPECIAL PROJECTS



is made up from incentive revenues, according to IIABA's 2015 Best Practice Study for \$25MM+ agencies



\*Harvard Business Review:  
[hbr.org/2012/10/big-data-the-management-revolution](http://hbr.org/2012/10/big-data-the-management-revolution)

# WE MEASURE OUR SUCCESS BY YOURS

Our business is about improving your operational foundations, your employees' contributions and engagement, and your business outcomes.

Here's what you can count on from ReSource Pro:

## **IMPROVE PRODUCTIVITY AND PERFORMANCE**

Our business practice areas are designed to improve every aspect of your operations as well as helping to improve sales effectiveness.

## **ENABLE PROFITABLE GROWTH**

By freeing up capacity within your organization, your people can sell more, service clients better, and have the headspace to innovate.

## **ELEVATE YOUR EMPLOYEES**

With increase bandwidth, your employees will be able to anticipate customer needs, build customer intimacy, and be proactive.

## **DELIVER EXCEPTIONAL SERVICE**

Whether it's from our white-gloved experiences or your own staff freed up by our teams to spend more time with clients, you'll see a difference in your organization's ability to provide an exceptional customer experience.

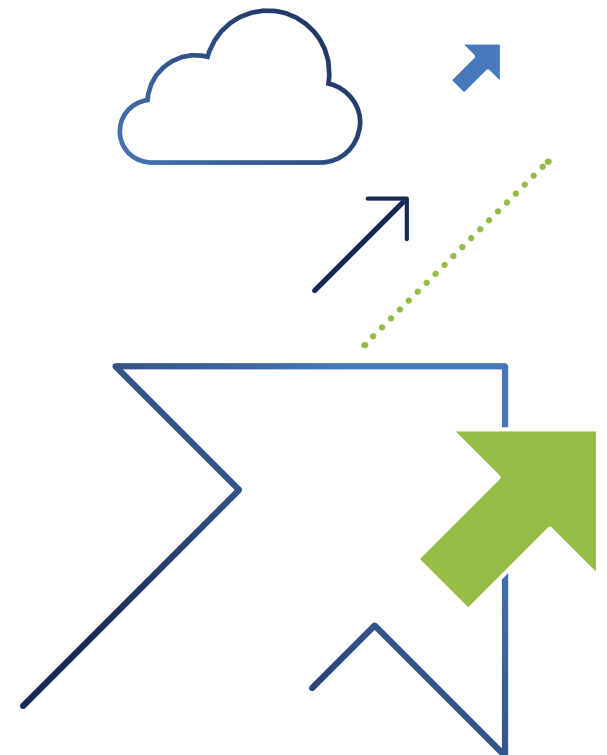
## **GET FUTURE READY**

We bring access to tools for effective innovation and foresight planning, disciplines that will help you envision change and capture opportunity.

“ I'M EXCITED BY THE POSSIBILITIES OF PARTNERING WITH OUR CLIENTS TO CREATE OPPORTUNITIES FOR GROWTH, INNOVATION AND PROFITABILITY THAT OUTPERFORM THEIR EXPECTATIONS. ”

*Dan Epstein*

*CEO, ReSource Pro*



# FOCUSING ON YOUR FUTURE

Our industry is in the midst of great change. Carriers are going direct. Distribution models are changing. Technology companies are becoming competitors. AI is threatening to take a larger slice of our jobs. Cars are becoming more autonomous, and the technologies that populate our homes and businesses are transforming risks and the way we work. All of these things and many more are going to impact the services we deliver and how we sell them. You need the capacity to think about how your business will evolve in the face of change. You'll need to know how to sell more effectively and stay nimble in your operations to make those changes.

As more than just a solution provider, ReSource Pro is here to partner with you to build the operational and sales excellence that will form the foundation of sustainable success. Each ReSource Pro client is an industry leader, incorporating the best people, process, technology, and data into all they do.



It's time to  
ReThink Operations.

**ABOUT RESOURCE PRO:**

ReSource Pro is an insurance-focused business solutions company that integrates people, process, technology, and data analytics. Over 1,000 carriers, brokers, and MGAs rely on ReSource Pro to execute strategies that improve profitability, accelerate growth, deliver improved claim outcomes, and enhance client and employee experience. With more than 6,000 employees globally, ReSource Pro provides business process management, strategic advisory services, management and organic growth consulting, training, and compliance solutions around the clock. ReSource Pro has been listed as one of the Inc. 5000 Fastest Growing Private Companies annually since 2009 and has consistently achieved a +96% client retention rate for over a decade.

**[resourcepro.com](https://resourcepro.com)**