

Partnering with ReSource Pro

Partnering for growth: How to scale operations and maintain quality

30 days

Ramp up time for onboarding hundreds of employees in multiple areas

99.9%

Average accuracy rate achieved by the client since working with ReSource Pro

~10k

Hours of annual capacity gain from ReSource Pro's Certs Center

About the customer

The client is a national insurance brokerage and risk management firm based in the United States. Its primary focus is on providing comprehensive insurance solutions and risk management services across various sectors, including commercial, personal, and employee benefits.

The challenge

As a rapidly growing insurance brokerage and consulting firm, the customer recognized the need to optimize their operations to scale faster while providing the same high quality risk management solutions to their partners. With multiple offices and a diverse portfolio of clients, the organization focused on standardizing workflows across multiple locations to gain more efficiency and be able to scale fast.

With the talent crisis continuing to challenge the insurance industry, the customer set a goal to proactively secure top expertise, ensuring exceptional service and setting their clients apart in a competitive market.

This organization partnered with ReSource Pro to support operations in the areas of certificate issuance and policy servicing, positioning themselves for sustainable growth while maintaining their focus on state-of-the-art risk mitigation strategies.

Customer profile

National Insurance Brokerage and Risk Management Firm, US

Business need

Increase the efficiency of policy servicing while resolving discrepancies in complex policies with the highest accuracy.

Solution

ReSource Pro's Policy Insights®, Certs Center, and Dedicated Team Support

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“What initially seemed like an impossible task to scale capacity in policy checking within a month was successfully accomplished by ReSource Pro. They delivered exactly the solution we needed with Policy Insights. ReSource Pro has proven to be a valuable partner to our organization, efficiently managing the increasing volume of work in policy checking, certificate management and beyond.”

– Operations team at one of the fastest growing retail insurance brokers

The solution



ReSource Pro provides expertise and dedicated teams to support the customer's offices within various business areas, including certificate issuance, policy servicing, and accounting. Our experts support a wide range of tasks, including document retrieval from carrier websites, indexing emailed documents, policy checking, verifying the accuracy of endorsements, and direct bill statement reconciliation.

The approach



Standardizing processes doesn't mean using a one-size-fits-all approach. During onboarding, our experts reviewed and documented the nuances in workflows for each business unit, ensuring that our recommendations captured exceptions and unique scenarios. The team makes ongoing recommendations to improve efficiency and customer experience, and works to achieve the right balance of people, technology, and standardized processes to deliver more value and support the organization's rapid growth.

The outcome

In just 30 days, ReSource Pro successfully onboarded and trained hundreds of employees across multiple business areas, delivering rapid time-to-value and immediate impact on the policy checking process. This fast-paced onboarding not only minimized possible workflow disruption but also maximized efficiency, empowering the organization to accelerate their success from day one, while maintaining high accuracy score of 99.9% and higher. The customer has seen a significant impact by leveraging ReSource Pro's Certs Center master templates, which streamlined the Certificate of Insurance (COI) issuing process.

For more information

visit us: <https://www.resourcepro.com/retail/>

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