

Operational precision amid growth

Driving growth through process precision: Convex & ReSource Pro's partnership

38.7%

increase in
submissions

50.5%

surge in binders &
policies issued

358%

increase in endorsements
& cancellations

“

If you're an insurance operation, I think it's key to have a partner like ReSource Pro in the back that absolutely knows and only does insurance. It is vital to us. We've been able to grow quickly with minimal impact on the business.

- Bob Eels, COO, Convex North American Insurance Services



About the customer

Convex, a fast-growing MGU, excels in complex risk underwriting, digital solutions, agility, and exceptional claims service. They engaged ReSource Pro while establishing their presence in the US. ReSource Pro served as their strategic partner from the outset, helping define the operational vision and target operating model, develop a comprehensive technology roadmap, and facilitate critical vendor selection decisions. This partnership proved foundational to their successful market entry, and in subsequent years, ReSource Pro has continued to play a major role in their operations across the E&S marketplace.

Operational precision amid growth

The 2025 challenge

Convex was focused on maintaining its high-growth trajectory while staying competitive by reducing operational costs. However, inefficiencies within the organization's Standard Operating Procedure (SOP) management became a major obstacle. Each business line at Convex had separate procedure files for tasks such as handling submissions, issuing policies, and sending binders, even when the processes overlapped significantly—often by up to 90%.

This decentralized structure created several challenges:

- **Redundancy:** Multiple similar SOPs led to duplicated efforts and unnecessary resource consumption.
- **Maintenance overhead:** Updates to SOPs were time-consuming, as each product file had to be independently modified and changes tracked across several files for similar activities.
- **Fragmented visibility:** Teams lacked centralized oversight, making it difficult to track procedure updates or ensure accountability.

With the growing complexity of business operations, it became clear that this problem hindered efficiency and added unnecessary costs, affecting both productivity and cost management. Convex needed a cohesive solution to streamline processes, consolidate resources, and improve visibility without compromising growth.

The solution

To tackle these challenges, ReSource Pro deployed the IOD methodology—Integrate, Optimize, and Digitize—to modernize Convex's SOP management. Multiple fragmented procedure files were integrated into centralized SOPs across all business lines, optimizing workflows by eliminating duplication and standardizing processes. Tracking was digitized through an Airtable-based solution that provided real-time visibility and accountability, enabling teams to collaborate from a single source of truth.

- The solution was implemented to track and manage task updates across SOPs, enabling:
- Easier monitoring and updating of all procedures.
- Greater accountability through visibility into task ownership and activity logs.
- Assurance that SOPs remained relevant and up to date.

By centralizing SOPs and streamlining with a collaborative tool, changes became more manageable and operational pain points were reduced.

The outcome

Convex achieved measurable results:

- A reduction in SOP maintenance time, enabling teams to focus on core business tasks.
- Enhanced consistency and accuracy in SOP updates, reducing duplication and confusion.
- Improved team accountability and monitoring, fostering a culture of ownership.

This initiative, powered by ReSource Pro, delivered meaningful cost savings while allowing Convex to maintain its growth momentum.

For more information

visit us: resourcepro.com
call us: 888.577.7552

