

# CASE STUDY | WHOLESALER

## OPERATIONS OPTIMIZATION

## RESOURCE PRO ACCELERATES PRODUCTIVITY AT BACKLOGGED FIRM

### ABOUT THE CUSTOMER

A large US-based combination wholesaler/MGA located in the Eastern US, with over 300 employees.

### THE CHALLENGE

Prior to working with ReSource Pro, the company paid out roughly 3,000 hours of overtime to one service team. This specific service team of 15 full-time employees each completed 200 extra hours of work on average during that year, meaning that 15 workers on overtime put in just as much time as 17 employees would have on a normal schedule. Not only was the team overworked, but the overtime wasn't working. One employee at the company revealed that their department had carried a backlog of items for more than a decade.

All of this had the potential to damage the company's reputation. Clients were frequently reporting that they were not receiving the level of service they expected. Further, the work being produced was often completed behind deadline, creating additional problems with clients.

### THE SOLUTION

The client strategically employed our Operations Advisory team who immediately went to work devising a process improvement strategy. The team examined various activities and tasks completed within the company's systems, and tracked every phone call. The following steps were then taken:

- Scores were assigned to each task employees were doing, giving the most time-consuming assignments and communications the highest "weight."
- Productivity targets were quickly established, keeping the relative importance and prioritization of each client and task in mind.

Employees were made aware of their own personal targets with results being shared with them on a weekly basis. This allowed the overworked employees at the firm to take a step back and better assess how they were spending their time. Within a very short period, the Operations Advisory team was able to entirely reshape the way employees allocated their time.

### THE RESULTS

ReSource Pro's operations diagnostic process offered the firm transparency into their own working methods. The results of this, and of the employees'

### CUSTOMER PROFILE

Large US-based combination wholesaler/MGA

### LOCATION

Eastern US

### BUSINESS NEED

Eliminate extensive backlog despite an overworked staff logging in over 3,000 hours of overtime annually.

### SOLUTION

ReSource Pro Operations Advisory

### THE IMPACT

- Increased productivity three-fold.
- Eliminated 10-year backlog in three months.
- Significant savings from almost eliminated overtime costs.
- Increased efficiency of operations for improved service, profitability and employee satisfaction.

reorientation, were monumental. The lowest achieving employee, in fact, was able to triple their productivity levels on an hourly basis, according to our productivity results report.

Within three months, a backlog that had remained active for over 10 years was eliminated entirely.

The biggest difference of all came in terms of overtime. Even though workers were producing at higher levels—and eliminating the backlog in record time—this service team was not working longer hours. As mentioned above, 3,000 hours of overtime were charged to the company by this team before working with ReSource Pro. With Resource Pro as a partner, overtime was almost eliminated for significant savings.

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**“FREQUENTLY, WE SEE ISSUES THAT HAVE BEEN A FRUSTRATION FOR EMPLOYEES FOR YEARS, OUR APPROACH GIVES THEM A VOICE AND ALLOWS THEM TO BE PART OF THE SOLUTION.”**

*KURT KOHURST,  
SVP OPERATIONS ADVISORY*

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## **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.

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## **FOR MORE INFORMATION**

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