

Harmony at Scale: How to build a more unified operating model

40+

Offices currently
partnered with
ReSource Pro

200+

Total offices across 7
regions being considered
for standardization

85%

Target standardization
of core processes while
maintaining office flexibility

“ ResourcePro’s collaborative approach has been essential in helping us develop standardized processes across our offices while maintaining the operational flexibility our regional teams need. ”

– Senior Vice President, Business Operations

About the customer

The client is a leading national insurance and financial services firm operating across multiple regions, with over 200 offices providing comprehensive insurance solutions including personal lines, commercial lines, employee benefits, and claims processing.

The challenge

The challenge was multifaceted: standardizing operations across offices using different agency management systems (including AMS 360 and Epic), maintaining promised independence to acquired agencies, and ensuring buy-in from offices accustomed to their own workflows. Previous attempts at standardization had failed because they lacked collaborative input from the offices themselves.

Customer profile

National Insurance and Financial
Services Firm, US

Business need

Transform disparate office operations
into a standardized regional model while
preserving necessary local autonomy.

Solution

ReSource Pro's Transformation Services

The impact

Following years of growth and acquisitions, the client faced the challenge of harmonizing operations across its extensive network of offices. Each office operated autonomously, and the client saw a need to move toward a more regional structure with standardized processes.

Transformation Services

The solution

Our experts implemented a collaborative approach to process standardization, beginning with three pilot offices that were already ReSource Pro partners. The solution involved developing "BPO in a box" - a standardized yet flexible operational framework. The approach centered on three key objectives:



Creating
enterprise-wide
best practices



Standardizing
ReSource Pro's
core processes
across offices



Maximizing outsourcing
benefits while preserving
15-20% operational
flexibility for local needs

The team began by standardizing personal lines and commercial lines processes, followed by claims, employee benefits, and accounting functions. Rather than imposing changes, our experts facilitated discussions that helped offices recognize their common ground in processes, leading to natural standardization.

The outcome

The initiative has established standardized processes for personal lines, commercial lines, and claims, with employee benefits and accounting standardization near completion. The groundwork has been set for a broader rollout across all of the client's regions, using a consultative approach that begins with understanding each office's pain points before presenting tailored solutions.

The collaborative methodology has already seen success with the pilot offices, identifying the process similarities across offices led to natural adoption of standardized approaches. This set the foundation for broader regional transformation while still maintaining local flexibility for individual offices.

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 11,000+ 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.

For more information

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