

Transforming employee benefits operations: How a top agency organization and ReSource Pro streamlined success

30-45

Days to scale regional team from 6 to 18 FTEs

14+

Offices supported with standardized workflows

2.25x

Growth in employee benefits support team size

The challenge

One of the top 10 retail agency organizations faced a critical inflection point in their employee benefits operations. Having built a trusted working relationship globally since 2007, ReSource Pro was able to leverage that 17-year service history to address the varied challenges.

With 14 offices operating with slightly different processes, they needed to both standardize workflows and dramatically scale their support team. The existing employee benefits division had developed various workflows over 10+ years, starting with eligibility management, which was a significant pain point. The challenge was threefold:

1

Rapidly expand agency's team by hiring and training 6-to-18 FTEs within a 30-45 day window

2

Align workflows across different agency teams while simultaneously onboarding the new staffers

3

Head off potential resistance from existing teams concerned about changes to their established processes

Customer profile

National Insurance Brokerage,

Business need

Standardize employee benefits operations across multiple offices while rapidly scaling the support team to meet top agency organization's regional growth.

Solution

ReSource Pro's Operations Advisory and Staffing Solutions

The impact

Within 45 days, ReSource Pro scaled the team from 6 to 18 FTEs while maintaining service quality. The workflows reduced redundant processing across all 14+ offices, leading to improved efficiency and consistency in employee benefits operations.

Top Agency + ReSource Pro

The challenge (continued)

And there was additional complexity, the expansion needed to support additional employees while extending services to all locations. This required careful coordination to maintain service quality while managing such rapid growth.

“ The feedback was instrumental in pointing us in the direction to expand our partnership with ReSource Pro. Pro-active communication along with recommendations helped streamline and improve workflows. ”

– Employee Benefits Practice Leader, Top Agency Organization

The solution

ReSource Pro implemented a comprehensive strategy to address top agency organization's challenges. The approach began with appointing a dedicated Resource Pro Liaison as the single point of contact, streamlining communication and ensuring consistent implementation across all offices. **The solution focused on three key areas:**



**Systematic workflow
documentation and
standardization across
all locations**



**Development
of clear, detailed
processes to support
the expanded team**



**Proactive
communication protocols
to manage change and
address team concerns**

The Resource Pro Liaison played a crucial role by managing carrier access, reinforcing workflows with the team, and continuously identifying process enhancement opportunities. This structured approach helped overcome initial resistance and demonstrated the value of standardized operations.

The outcome

The partnership's success has led top agency organizations to consider expanding ReSource Pro's role in 2026, potentially supporting their Benefits Analyst team with spreadsheeting and Technology Team with system builds.

For more information

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