

From capacity crunch to confident data: Waypoint Mutual's journey with ReSource Pro

About the customer

Organization: Waypoint Mutual

Size: 75 employees

Industry: Carrier

Core system: Insurity Workers Comp Suite (IWCS)



~10

initiatives completed
in one year

We helped Waypoint Mutual deliver roughly ten technology and operations initiatives—spanning reporting, analytics, integrations, and loss control—within a 12-month period.

300

query audit advanced in 60 days
after 14 months stalled

A long standing 300-query audit, which had sat on the back burner for about 14 months internally, was restarted and significantly advanced within a 60 day engagement.

75

employee carriers supported without
expanding internal admin team

Waypoint Mutual's lean internal administration team was able to progress a broad backlog of work by leveraging our team as a flexible extension of the organization, rather than increasing permanent staff.

Challenge

Waypoint Mutual was balancing the realities of a lean organization with the demands of a modern carrier. As new priorities emerged—improving reporting and analytics, standing up portals, modernizing loss control tools, and getting more value from their core platform—the internal team simply didn't have the bandwidth or breadth of skills to tackle everything at once. The risk wasn't just a single point of failure; it was a growing backlog of initiatives that could slow Waypoint's ability to execute its strategy.

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Solution

Augmenting Waypoint Mutual's lean team with targeted expertise across their core platform, analytics, and key initiatives.

- Core **Workers Comp Suite** support and back office IT
- **Reporting, analytics, and Power BI** implementation
- **Integrations and custom development**, including injured worker portal and loss control solution

Outcome

By augmenting their lean team, Waypoint Mutual was able to move a broad set of initiatives forward without adding full time headcount. Over the course of a year, Waypoint was able to reduce operational risk, clear a growing backlog of work, and get more value from its core systems and data.

- **~10 initiatives completed in one year**
- **Faster delivery** on integrations, analytics, portals, and loss control without expanding internal staff
- **Deeper utilization of Insurity's Workers Comp Suite and data**, enabled by reporting, analytics, and Power BI

The capacity crunch

Waypoint Mutual faced a resource constraint challenge that many growing carriers encounter. As a 75-employee organization, Waypoint Mutual relied on a lean internal team to manage its Insurity's Workers Comp Suite platform, with core system responsibilities concentrated in a single role. This concentration of work created significant operational bottlenecks.



Project backlog crisis

With core system responsibilities concentrated in one role, Waypoint Mutual was struggling to keep up with internal project demands. Critical initiatives were stalling, and the backlog continued to grow.



Data quality and trust issues

Over time, the organization had accumulated more than 300 queries in their system. Many were duplicates, and field naming conventions had become inconsistent. This created uncertainty around data accuracy, particularly for financial reporting.



Limited scalability

Core system operations consumed most of the available internal bandwidth, leaving little capacity for strategic initiatives like Power BI integration or loss control system implementation. In this model, one role could only do so much.

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The precision partnership

Our team brought immediate relief through a combination of deep platform expertise and flexible resource capacity. The engagement was built on a foundation of trust. Several team members had previously worked directly with Insurity, the core platform vendor, giving Waypoint Mutual instant confidence in their technical capabilities.

The delivery team's approach focused on three strategic areas:



Rapid project execution

The team quickly mobilized to tackle Waypoint Mutual's project backlog, completing approximately 10 projects from start to finish. This kept the organization's annual roadmap on track and prevented further delays.



Data quality and standardization

Working in close partnership with Waypoint Mutual's internal operations team, the delivery team began a comprehensive audit of over 300 queries.

The work included:

- Identifying and eliminating duplicate queries
- Ensuring terminology alignment across the system
- Validating that field names matched the actual data being pulled
- Creating clear documentation for future reference



Automated processing oversight

When Waypoint Mutual's new CFO needed immediate assistance understanding general ledger reporting capabilities, the team pivoted seamlessly. The team expanded from a focused document template project to a broader knowledge transfer initiative, deploying four specialists to address the CFO's questions and provide system training.

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The number one thing is, they're genuinely engaged in the work they're assigned. Most vendors we engage with are constantly emailing or calling to ask, 'What else do you have? What else can we do?' We don't get that kind of pressure from this team. They focus on delivering excellent work and then give us space until we're ready for the next project. That's absolutely huge.

BETH LONG

COO/Director of Claims, Waypoint Mutual

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Results that matter

Accelerated project delivery

Approximately 10 projects were completed with the team's support, helping Waypoint Mutual chip away at its backlog and keep its annual roadmap on track. Work that had previously stalled internally—such as the 300 query effort—was advanced in a matter of weeks through coordinated team effort.

Enhanced data accuracy and trust

The comprehensive query audit began to transform how Waypoint Mutual approaches data. Teams can now trust the information being pulled from the system, eliminating the circular discussions about whether reports are accurate. This has enabled the organization to confidently move forward with Power BI integration and advanced analytics initiatives.

Improved resource utilization

By offloading specialized projects to the team, Waypoint Mutual's internal resources can focus on strategic priorities rather than being consumed by backlog management. The relationship is evolving from initial project support to an ongoing strategic partnership.

Exceptional turnaround speed

Tasks estimated at four weeks were, at times, completed within days. For example, when asked to research and document a complex system feature, the delivery team provided a comprehensive training guide by the end of the same week.

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Every timeline is met. They stay in communication during the entire process. I never have to hunt anybody down. Turnaround times have been very impressive, which really just makes everything go so much easier.

BETH LONG

COO/Director of Claims, Waypoint Mutual

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Why it works

Approximately 10 projects were completed with the team's support, helping Waypoint Mutual chip away at its backlog and keep its annual roadmap on track. Work that had previously stalled internally—such as the 300 query effort—was advanced in a matter of weeks through coordinated team effort.

Platform familiarity

Several team members previously worked at Insurity, eliminating most ramp up time and ensuring immediate productivity.

Professional partnership approach

Unlike vendors that constantly push for more work, the team prioritizes exceptional results and respects the client's timeline and decisions creating a low-pressure, high-trust partnership.

Proactive communication

Timelines are consistently met, and communication flows seamlessly without the client needing to follow up or chase updates.

Flexibility and responsiveness

The ability to pivot quickly when priorities shifted (such as the CFO's reporting needs) demonstrated true partnership rather than rigid project execution.

What's next

Waypoint Mutual continues to collaborate with the team on strategic initiatives, including implementation of a loss control system and ongoing data optimization projects. Waypoint Mutual's internal team is transitioning into a more direct partnership role as trust in the team has been firmly established through consistent delivery.

The engagement has evolved from tactical relief for immediate backlogs to a strategic partnership that enables Waypoint Mutual to pursue initiatives that would otherwise remain on the wish list.

About ReSource Pro

ReSource Pro is the leading provider of data, operational, and technical services for the insurance industry. Our Technology Services offerings include data services, which specializes in core system implementations, data cleanup and management, and technology advisory for carriers and MGAs. With deep expertise in platforms like Insurity, Duck Creek, and Guidewire, we help insurance organizations maximize their technology investments and eliminate operational bottlenecks.

*This case study is based on a client interview conducted in March 2026.

For more information

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