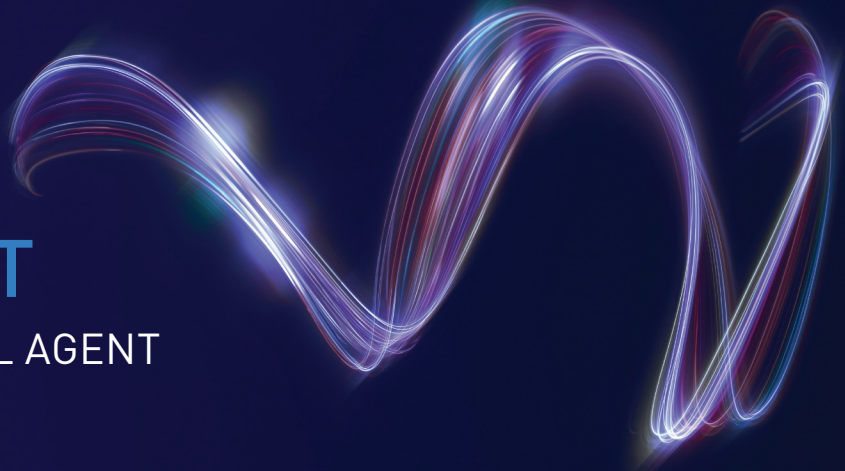


BUSINESS PROCESS MANAGEMENT

CLAIMS HANDLING | RETAIL AGENT



EXPEDIENT AND EFFICIENT

The need to file a claim is the reason your clients purchase insurance. How your agency handles a customer's claim is the real moment of truth. Good service, you've got a happy customer. Great service, you've got a loyal customer. Poor service, you've got a temporary customer. When a claim arises, that's the time to ensure that things run smoothly, accurately, and on time.

RESOURCE PRO CLAIMS HANDLING

Providing efficient, effective, and timely service is essential to offering excellent customer service and fulfilling regulatory requirements. The ReSource Pro Claims Handling service ensures that your customers know their claim is being prioritized, and that all necessary steps are taken to secure a satisfactory outcome. From setting up the claim to following up with adjusters, we'll help you handle claims effectively.

1. CLAIM ENTRY

We start by setting up the claim in your system and configuring the claim notice.

2. DILIGENT FOLLOW UP

We'll make sure that a claim # and adjuster are assigned and prepare the communication to your client.

3. UPDATE CLAIM STATUS

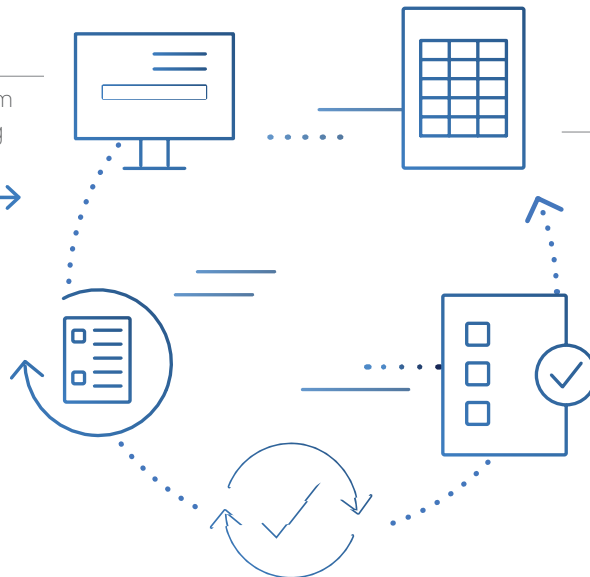
We'll follow up and update the claim status and notes for client communications.

5. REPORTS AND PROJECTS

Your team can support analysis by compiling and preparing reports for you.

4. CLAIM CLOSE OUT

You won't have to worry about having bad information in your system. No one will forget to close out a claim.



CLAIMS HANDLING | RETAIL AGENT

HERE'S WHY IT MAKES BUSINESS SENSE

ENHANCED CLIENT EXPERIENCE – Timely follow-up and client communication ensures satisfaction and peace of mind.

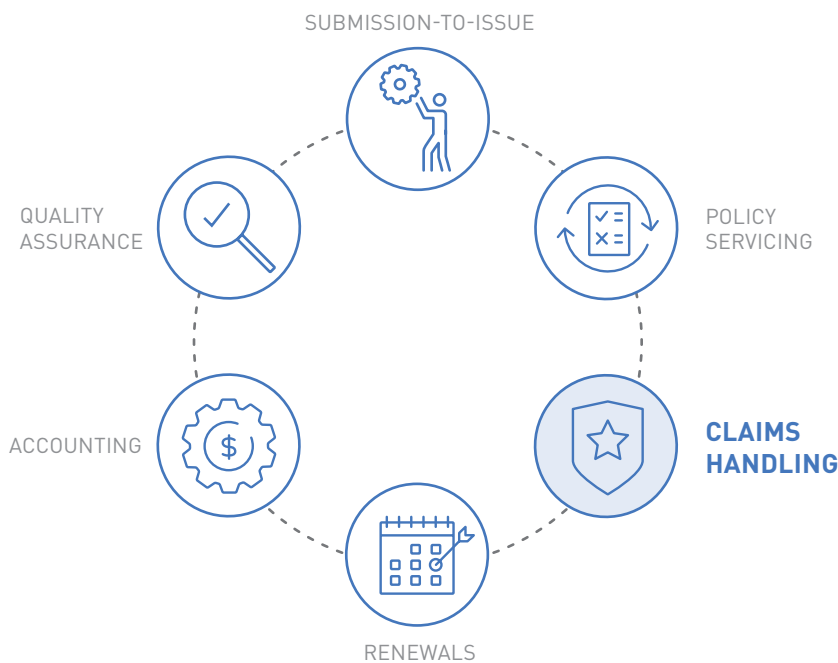
QUALITY DATA INTEGRITY – You'll have confidence in and control of the data in your own system, which improves your ability to monitor, manage and analyze on behalf your clients.

REDUCED TIME AND RESOURCES – When we take over a task, your staff can focus on higher-value work. Moreover, we reduce turnaround times with our super-efficient processes—all contributing to excellent customer service.

STRONGER RELATIONSHIPS – Efficiently and effectively managing the process gives both clients and carrier partners increased confidence and satisfaction.

BUSINESS PROCESS MANAGEMENT MODULES

When you delegate critical administrative tasks to ReSource Pro, you'll be able to optimize their execution, leading to improved customer service and satisfaction. Moreover, you'll give your staff more capacity for revenue-generating activities.



EXPERIENCE YOU CAN COUNT ON

Approximately

60,000



claims processed

and submitted to carriers each year

About **4%** of E&O claims are caused by failure to provide timely notice of a claim to a carrier*



First notices of loss are submitted within **1 day**

*Insureon: <https://agents.insureon.com/news/top-6-errors-omissions-claims-against-insurance-agents>

FOR MORE INFORMATION

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email us: more@resourcepro.com

call us: 888.577.7552

