

Modernize your Employee Benefits operations with confidence

Automation, AI, and technology solutions designed for insurance agencies.

Layering new tools and AI onto legacy systems often creates additional complexity for Employee Benefits teams. ReSource Pro helps retail agencies streamline Employee Benefits operations through deep insurance expertise, technology, and operational support.

We modernize workflows, improve efficiency, and build scalable foundations for growth, supporting the full Employee Benefits operational lifecycle from onboarding and renewals to administration, servicing, and data management.

Why ReSource Pro?



2K+
retail clients



96%
client retention rate
for 10+ years



Our Employee Benefits capabilities include:

Marketing and renewal support

- Census building

Client presentation material

- Benefits guide and employee communication

Plan document review and auditing

- Billing/invoicing

Commission validation

- Data input and analytics



BenefitPoint and Benefits Administration support:

Data cleanup

- Identify and resolve integration and data consistency gaps

Data conversions

- Support book transfers to BenefitPoint through upfront data validation and remediation planning

System optimization

- Improve system usability and reporting

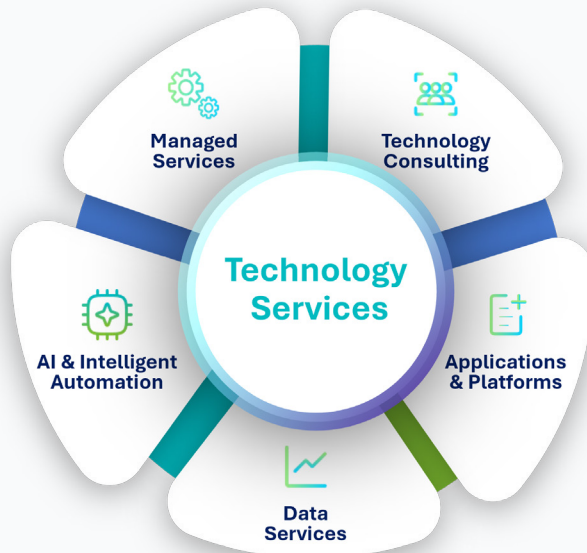


Technology services

Modernize agency technology

Forward-looking technology solutions that strengthen system, data, and operations:

- Technology consulting
- Applications and platforms
- Data and analytic services
- Managed services
- Data conversion



AI and automation

Gain efficiency through automation

Helping agencies implement automation that drives measurable ROI:

- Automation discovery and roadmap development
- Maturity and readiness assessment
- Systems and data integration (APIs, iPaaS, ETL, virtualization)
- Custom solutions including agentic AI, machine learning, and workflow automation

**Turn your technology investments
into measurable growth.**



Scan for more information.

For more information

visit us: resourcepro.com
call us: 888.577.7552

