COMPREHENSIVE TRAINING PLAN SMOOTHS ADMINISTRATIVE SYSTEM IMPLEMENTATION

CHALLENGE

The carrier is a current ReSource Pro client that was seeking to implement a new administrative system with a facilitated training curriculum for end users.

As the carrier was focused on the technology build, testing, and launch of the new system, they needed a partner who could support the training curriculum build and deployment. The project had a tight timeline, which required detailed project planning and governance to create and deliver user training content. By leveraging ReSource Pro, the carrier could gain the expertise and capacity lift necessary to support their strategy.

SOLUTION

ReSource Pro's Operations Advisory consultants led the development of a repeatable end user training curriculum for the carrier's new system. This began with establishing the overall project governance and creating a training and delivery plan—including training topic, preparation and delivery time, estimated number of trainees, targeted user groups, and delivery method. Next, the ReSource Pro team focused on developing standard operating procedures, job aids, and training content—such as how-to user guides, facilitation guides, and case studies for user practice. The team then coordinated and delivered the training, which included instructor-led sessions, breakout groups, discussion groups, and polls. Finally, the ReSource Pro team conducted post-training knowledge assessments and checks to verify knowledge retention and gather feedback on the training.

IMPACT AND RESULTS

- 200 key activities completed (training design, discovery sessions, content creation, etc.)
- 109 user training content guides and case studies completed
- 36 training sessions delivered
- Training delivery to 9 targeted user groups, or approximately 180 users
- Created structure for ongoing training delivery and deployments
- Completed the training initiative on time and on budget

CUSTOMER PROFILE

Specialty Carrier

LOCATION

Multiple locations in the U.S.

BUSINESS NEED

Development and delivery of training for administrative system

SOLUTION

ReSource Pro Operations Advisory

THE IMPACT

- Completed the training initiative on time and on budget
- Created a structure for ongoing training delivery and deployments

ABOUT RESOURCE PRO

ReSource Pro is an insurance-focused business solutions company that integrates people, process, technology, and data analytics. Over 1,500 carriers, brokers, and MGAs rely on ReSource Pro to execute strategies that improve profitability, accelerate growth, deliver improved claim outcomes, and enhance client and employee experience.

FOR MORE INFORMATION

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