

## ELIMINATING BACKLOGS AND BOOSTING THE EFFICIENCY OF LARGE ACCOUNT RENEWALS

### CHALLENGE

A Top-10 U.S. insurance broker was suffering from a heavy backlog and service level agreement non-compliance issues after one of its most experienced account managers left the company. In addition, the broker now lacked a staff member to support large account renewals. As an existing client of ReSource Pro, the broker chose to leverage ReSource Pro's Premier Service to complement their existing services.

### SOLUTION

A Premier Service team member quickly set about supporting one of the broker's account managers in executing large account renewals. This included creating a work progress dashboard to visualize account renewal progress, enabling timely follow ups and accelerating the process. To further alleviate pressure, the Premier Service team member also assisted the account manager in maintaining clients' large data and schedules—such as an endorsement ledger for a national client with 8 subsidiaries and over 10,000 vehicles—and preparing client meeting data and materials. Finally, the Premier Service team member collaborated with the account manager to create a plan for eliminating their backlog using both Premier Service and regular service resources.

### IMPACT AND RESULTS

ReSource Pro's Premier Service enabled the broker to meet 100% of large account renewal deadlines and maintain 100% client retention. Partnering with the Premier Service team also allowed the client's account manager to completely eliminate their backlog and catch up on their work schedule.

### CUSTOMER PROFILE

A Top-10 insurance broker

### BUSINESS NEED

Management of the large account renewal process and elimination of account manager backlog.

### SOLUTION

ReSource Pro Premier Service

### THE IMPACT

- Met 100% of large account renewal deadlines
- 100% client retention rate
- Cleared backlog, boosting efficiency and productivity

### ABOUT RESOURCE PRO

ReSource Pro is an insurance-focused business solutions company that integrates people, process, technology, and data analytics. Over 1,000 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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