

USE CASE | NATIONAL BROKERAGE

INSURANCE EXPERIENCE CENTER

WHITE-LABEL SOLUTION ENHANCES BROKER'S SMALL-COMMERCIAL ACCOUNT SERVICING

CHALLENGE

The client acquired an agency business with a significant book of small-commercial accounts, increasing the volume of servicing requests for the company. The client needed a cost-effective way to serve this segment and maintain its operating margins.

SOLUTION

ReSource Pro's Insurance Experience Center (IX Center) provided a white-labeled, end-to-end, outsourced servicing solution. Our dedicated and highly experienced team delivered a full range of services, including: new business quoting and binding; managing the renewal process from beginning to end; handling all policy servicing requests, such as certificates of insurance and change requests; and supporting billing, among other functions.

IMPACT AND RESULTS

The client has a national presence, serving individuals as well as small, midsize and larger commercial insurance customers. Working with ReSource Pro, the client was able to optimize its newly acquired agency operations and re-deploy experienced account management staff to focus on more complex accounts. Outsourcing its front-office servicing to ReSource Pro helped this client:

- Sustain a guaranteed profit margin
- Maintain a high-rate of account retention
- Strengthen its brand by providing best-in-class customer care

CUSTOMER PROFILE

A large, national insurance brokerage

LOCATION

Multiple locations in the U.S.

BUSINESS NEED

End-to-end policy servicing

SOLUTION

Insurance Experience Center (IX Center)

THE IMPACT

- Sustained profit margin
- High retention rate
- Improved customer service

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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