# Manage Certificates of Insurance with ease and confidence

## Business challenge

While the issuance of the Certificate of Insurance (COI) and Evidence of Property (EOP) is often perceived as a simple and repetitive task, these processes pose real risks for insurance agencies. The process is time-consuming and vulnerable to errors, leading to a poor customer experience and frustrated clients. Given the surge in COI requests and the need for accuracy, agencies face significant challenges including:

### Risk of E&O exposure
Lack of insurance knowledge, standardized processes or integrated systems can create significant errors and omissions (E&O) risks.

### Reputational damage
Delays in issuing COIs and EOPs to clients who rely on your agency can delay their work. Long wait times and errors can erode trust in your agency, and result in a loss of business.

### Poor employee experience
Certificate requests create frequent interruptions for account managers, keeping them away from higher level tasks and leading to stress and backlogs.

## The ReSource Pro difference

ReSource Pro's Certs Center offers a comprehensive solution for managing and issuing COIs and EOPs, allowing insurance agencies to streamline their processes, reduce risks, and improve client satisfaction. Unlike other services in the market that focus on simple, repetitive tasks and depend on agency account managers to handle complex cases, our comprehensive services cover the entire process from start to finish, including resolving discrepancies and handling complexity.

### Minimized E&O risk
Get standardized service, ensuring consistent, high-quality results that minimize E&O liability risks. ReSource Pro offers E&O Indemnity for mistakes.

### Quick turnaround time
Certs Center offers a quick turnaround of 2-6 working hours for on-demand Certificates of Insurance and Evidence of Property insurance.

### Increased client satisfaction
White-labeled service keeps your agency front and center, enhancing client relationships and trust.
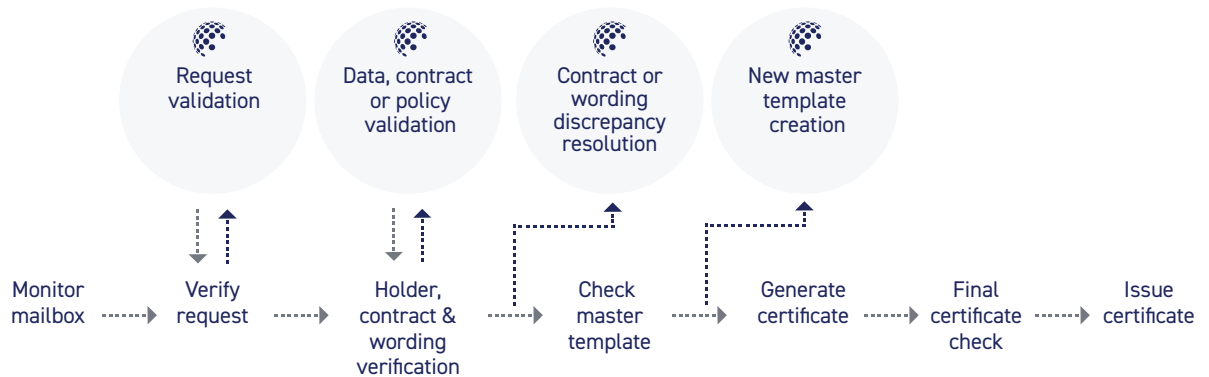
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ReSourcePro

# Certs Center

## The ReSource Pro advantage: Expertise in managing complexities and exceptions

ReSource Pro manages the end-to-end certificate issuance process, from monitoring the mailbox and verifying requests to generating, checking, issuing, and delivering certificates. We also handle exceptions, such as contract or policy validations, discrepancy resolution, and the creation of new master templates, ensuring efficiency, accuracy, and seamless delivery throughout the entire workflow.

**ReSource Pro's exception steps**

- Request validation
- Data, contract or policy validation
- Contract or wording discrepancy resolution
- New master template creation

**Certs center standard process**

Monitor mailbox ----> Verify request ----> Holder, contract & wording verification ----> Check master template ----> Generate certificate ----> Final certificate check ----> Issue certificate
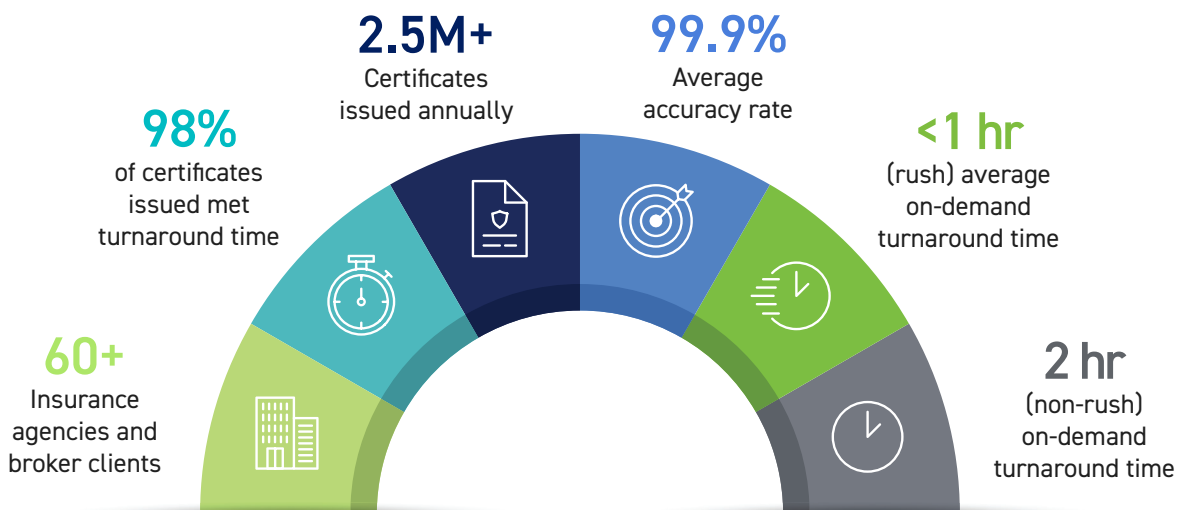
## The impact

Account managers can dedicate more time toward client-facing, revenue-generating activities that help grow the agency. ReSource Pro's expertise and flexible, transaction-based pricing helps agencies:

- Scale their operations with fluctuating volumes
- Ensure consistent quality of certificates through standardized processes within or across offices
- Reduce E&O exposure and prevent financial loss

**A large regional broker reduced its Centralized Service Center staff by 40% and promoted a significant portion of that staff to roles directly supporting client service and higher-level activities.**

**2.5M+**
Certificates issued annually

**99.9%**
Average accuracy rate

**98%**
of certificates issued met turnaround time

**<1 hr**
(rush) average on-demand turnaround time

**60+**
Insurance agencies and broker clients

**2 hr**
(non-rush) on-demand turnaround time

### For more information

visit us: resourcepro.com/retail
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