



Efficiency from the Start

The Submission-to-Issue process sets the tone for the experience your customers have with your agency. You want it to go smoothly and give your clients the answers they want. Moreover, you want answers fast so you can focus resources on accounts that meet your carriers' criteria.

ReSource Pro Submission-to-Issue

We'll review and process your submissions, freeing up your sales and service teams to support more business. And because we optimize your processes, we make your clients' experience more smooth and efficient.

What We Do

We build on our extensive Submission-to-Issue experience and customize the process to fit your needs.

1. REVIEW SUBMISSION

We'll review submissions as they come in, ensuring they comply with the rules you've predefined.

2. SET-UP APPLICATION

Cleared applications are set up in your system. You'll be notified of any issues or missing requirements (documents or information).

3. SUBMIT TO UNDERWRITING

The completed application is sent to underwriting to determine if the risk is a fit.

4. CHECK ACCURACY

After underwriting, we'll check the accuracy of data, enabling relevant quotes.

5. GENERAL PROPOSAL

Your ReSource Pro team will generate quotes (online when applicable) and cover letters — everything ready for you to review and send.





Business Process Management

Submission-to-Issue Solution | Retail

Here's Why It Makes Business Sense

REDUCED TIME AND RESOURCES – we'll quickly identify submissions that don't meet your criteria. This saves you and your client time and resources, allowing you to move on to new opportunities.

ENHANCED CLIENT EXPERIENCE – clearly defined and proven procedures, executed by your highly skilled ReSource Pro team, ensures that submissions are moved through the process quickly and accurately.

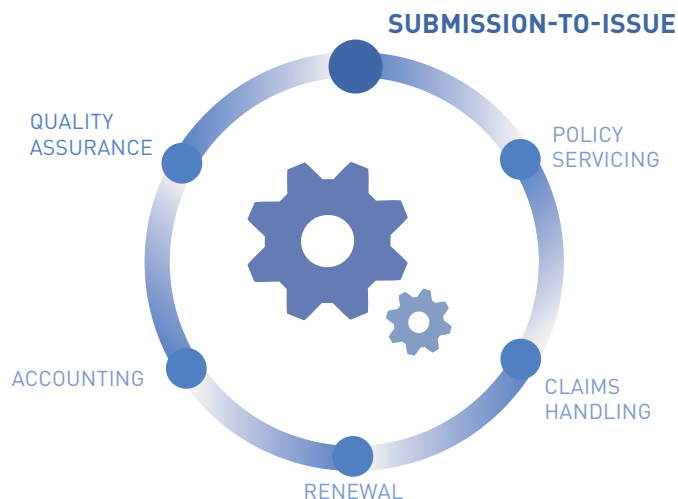
INCREASED QUOTE-TO-BIND RATIOS – better responsiveness and improved quoting helps increase your quote-to-bind ratios and overall profitability. It also gives your Account Managers the ability to spend more time with insureds to evaluate their coverage needs.

24/5 COVERAGE – with 24/5, we're working even when you're not. That allows you to serve your clients faster, increase responsiveness, and process more business.

BETTER PERFORMANCE – using best practices and proven methodologies, the submission-to-policy process is not only optimized throughout, it frees up your internal staff to focus on revenue-generating activities such as cross- and up-selling; planning and executing new initiatives; and expanding capabilities.

Business Process Management Modules

When you delegate critical administrative tasks to ReSource Pro, you'll be able to optimize their execution, leading to improved customer service and satisfaction. Moreover, you'll give your staff more capacity to spend on revenue-generating activities.



Experience You Can Count On

67,000

submissions processed for retail clients in 2016



70%

improved submission clearance and turnaround time for one client



Responsiveness Matters:

according to *Inside Sales*, 30-50% of sales go to the vendor who **responds first**



For more information

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