

Business Process Management

# Claims Handling Solution | Retail

## Expedient and Efficient

The need to file a claim is the reason your clients purchase insurance. How your agency handles a customer's claim is their real moment of truth. Good service, you've got a happy customer. Great service, you've got a loyal customer. Poor service, you've got a temporary customer. When a claim arises, that's the time to ensure that things run smoothly, accurately, and on time.

## ReSource Pro Claims Handling

Providing efficient, effective and timely service is essential to offering excellent customer service and fulfilling regulatory requirements. The ReSource Pro Claims Handling solution ensures that your customers know their claim is being prioritized, and that all necessary steps are taken to secure a satisfactory outcome. From setting up the claim to following up with adjustors, we'll help you handle claims effectively.

## What We Do

We build on our extensive Claims Handling experience and customize the process to fit your needs.

### 1. CLAIM ENTRY

We start by setting up the claim in your system, and configuring the claim notice.

### 2. DILIGENT FOLLOW UP

We'll make sure that a claim # and adjuster are assigned, and prepare the communication to your client.

### 3. UPDATE CLAIM STATUS

We'll follow up and update the claim status and notes for client communications.

### 4. CLAIM CLOSE OUTS

You won't have to worry about having bad information in your system. No one will forget to close out a claim.

### 5. REPORTS AND PROJECTS

Your team can support analysis by compiling and preparing reports for you.





### Here's Why It Makes Business Sense

**ENHANCED CLIENT EXPERIENCE** – timely follow-up and client communication ensures satisfaction and peace of mind.

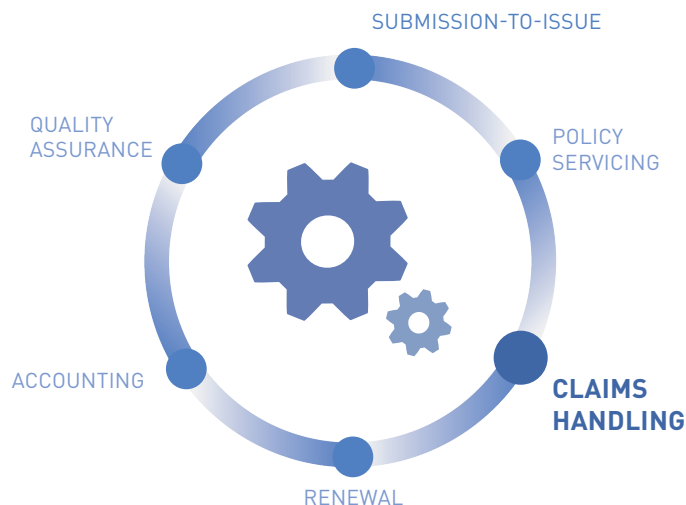
**QUALITY DATA INTEGRITY** – you'll have confidence in and control of the data in your own system, which improves your ability to monitor, manage and analyze on behalf your clients.

**REDUCED TIME AND RESOURCES** – when we take over a task, your staff can focus on higher-value work. Moreover, we reduce turnaround times with our super-efficient processes – all contributing to excellent customer service.

**STRONGER RELATIONSHIPS** – efficiently and effectively managing the process gives both clients and carrier partners increased confidence and satisfaction.

### 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

Approximately  
**60,000**  
 claims processed  
 and submitted to carriers in 2016

About  
**4%**  
 of E&O claims are caused by **failure to provide timely notice** of a claim to a carrier\*

Over **50,000**  
 claims processed annually. First notices of loss are submitted within **1 day**

\*Insureon: <https://agents.insureon.com/news/top-6-errors-omissions-claims-against-insurance-agents>.

### For more information

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