

# CASE STUDY | RETAIL

## EMPLOYEE BENEFITS

### OPTIMIZING OPERATIONS TO INCREASE REVENUE PER EMPLOYEE

#### ABOUT THE CUSTOMER

ReSource Pro is currently partnering with the Employee Benefits (EB) division of one of the world's largest insurance brokers.

#### THE CHALLENGE

The director of the EB division set a goal to raise revenue per employee. An integral part of achieving that goal is giving consultants the capacity (time and resources) to focus on higher value, revenue-generating activities. This required the team to optimize their operations and processes, including transferring some of these processes to external teams.

#### THE SOLUTION

After hearing about the promising results other divisions had achieved since partnering with ReSource Pro, EB management sought out ReSource Pro for a solution. One of the team's first actions was to standardize processes. EB consultants juggle a huge volume of administrative tasks, and in the absence of a defined process, each employee completed tasks in a unique way. This meant that best practices for efficiency weren't applied consistently, and waste had become a major byproduct. ReSource Pro worked with the division to develop standardized processes that were infused with industry best practices, making the division more efficient and effective, thus elevating service levels.

These standardized processes were developed in close collaboration with ReSource Pro's service delivery teams. So once in place, the processes transferred seamlessly to the very same service delivery teams that had helped develop them.

"This gave EB management and consultants the ability to immediately pursue high-value, revenue-generating activity, which goes straight to the top and bottom lines," said K. Patrick Armstrong, CPCU, EVP of Business Development at ReSource Pro.

#### THE RESULTS

High levels of involvement and support from the entire division led to a smooth implementation and provided the division with measurable ROIs almost immediately. Improving and standardizing processes and then transferring

#### CUSTOMER PROFILE

Insurance, Employee Benefits

#### LOCATION

New England Region, US

#### BUSINESS NEED

Increase revenue per employee within Employee Benefits division.

#### SOLUTION

Standardize and optimize processes allowing the division to source low-value activities to their ReSource Pro team.

#### THE IMPACT

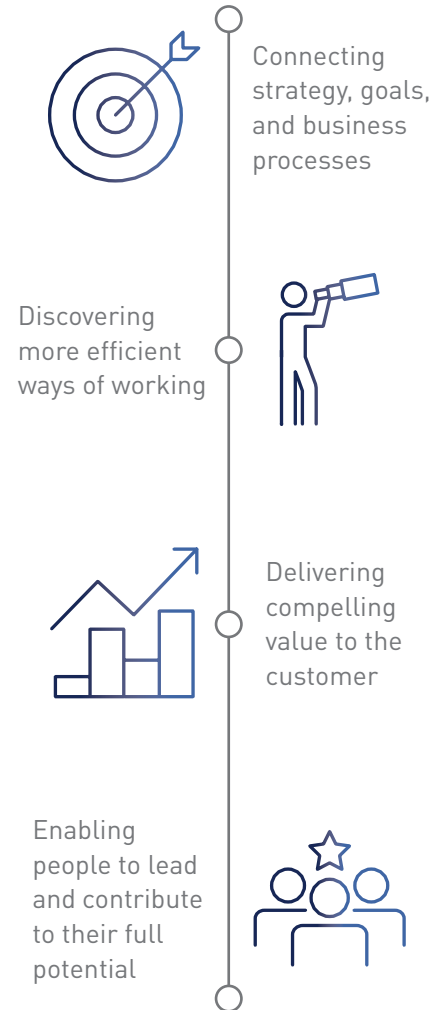
- Consultants now have more time to strengthen relationships, service accounts and focus on revenue-generating activity.
- Standardized and streamlined procedures have optimized processes and improved service.
- Due to the initial success of the project, additional processes are being optimized to further improve operations and results.

them to external ReSource Pro teams helped the EB division achieve key business objectives such as:

- Increasing capacity for consultants
- Creating more efficient and effective processes
- Improving customer service

Based on the initial impact of the solution, the division is expanding its partnership with ReSource Pro to further scale the results they've realized.

## LEAN PROCESS FUNDAMENTALS



### ABOUT RESOURCE PRO

ReSource Pro brings to the insurance industry tools, technology and strategic services that enable profitable growth through operations excellence. Headquartered in New York, ReSource Pro's global service centers address client operational needs around the clock. Recognized as an industry thought leader and listed as one of Inc. 500/5000 Fastest Growing Private Companies annually since 2009, the company is renowned for its focus on innovation, service excellence and trusted partnerships, and its unique productivity platform for insurance operations. Over 5,000 ReSource Pro employees provide dedicated support to hundreds of insurance organizations, consistently achieving a 97% client retention rate for over a decade.

### FOR MORE INFORMATION

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