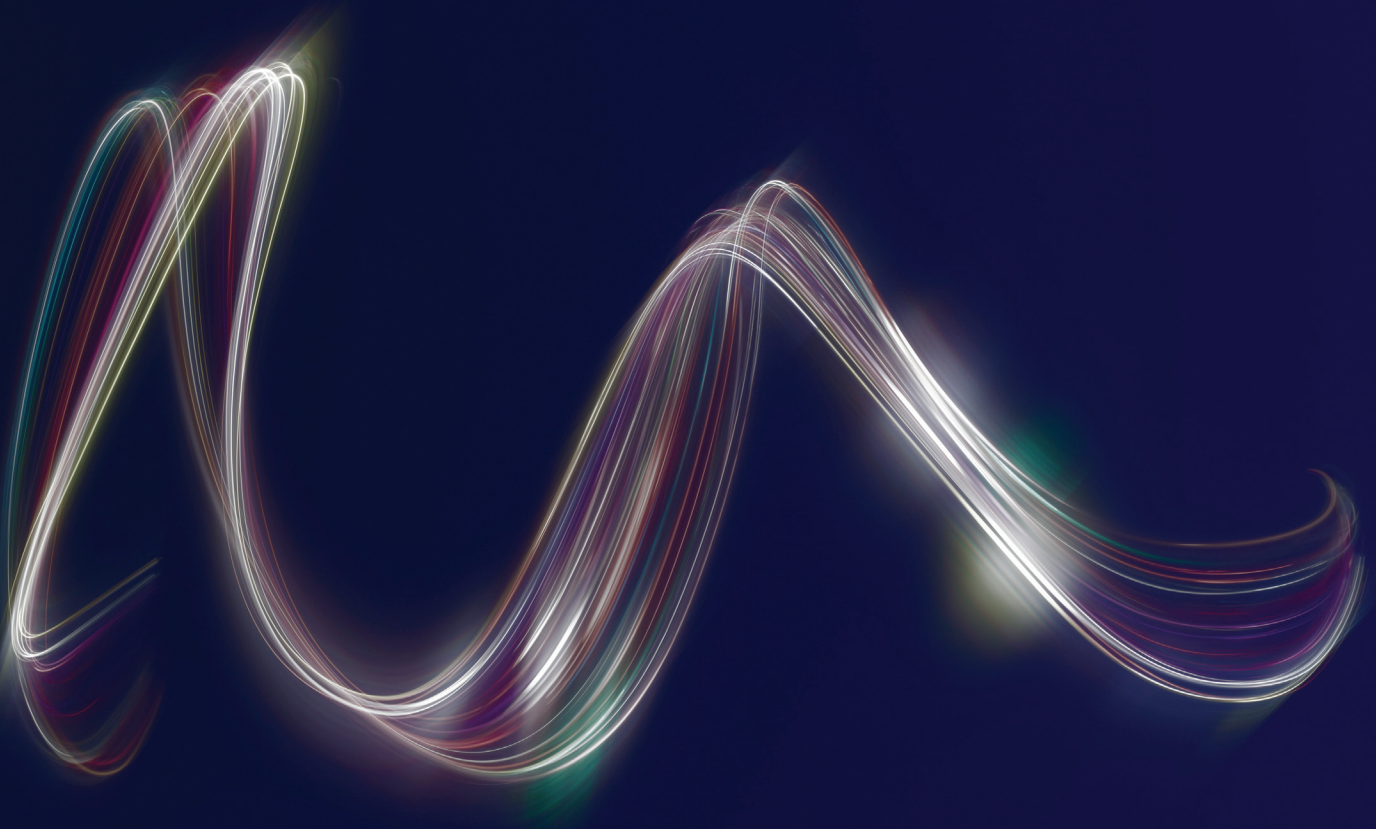


OPERATIONS OPTIMIZATION

ALIGNING OPERATIONS TO
BUSINESS OBJECTIVES



ACHIEVE YOUR BUSINESS OBJECTIVES

In most businesses today, management is expected to improve business results year-over-year. In the insurance industry, a typical growth strategy is through acquisitions: new sales people, systems, agencies, and books of business. These certainly can add top-line growth, but they also add cost, risk, variability, and complexity, which often drag down productivity and profitability.

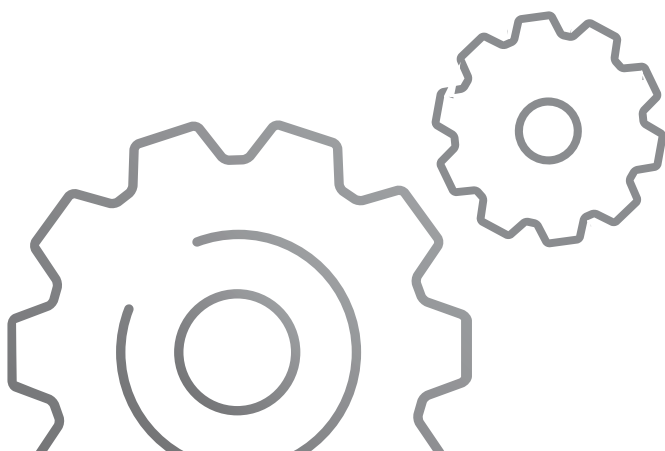
The best way to increase profitability is to improve the efficiency and effectiveness of your business operations. This will increase your capacity to acquire and grow accounts without having to expand your service teams. And once you have standardized and streamlined your operations, you'll be poised to maximize the returns from any future investments, including adding salespeople, deploying new systems, or acquiring business.

OPERATIONS EXCELLENCE DRIVES PROFITABLE GROWTH

Operations excellence ensures we have the right people, doing the right things, with the right tools and training. To do that, you need to address every aspect of your operations lifecycle: people, process, technology, and data.

By creating a measurement environment, team members know how they are contributing and managers are enabled to be effective coaches. This in turn enables your people to improve their performance and as a result improves your bottom line.

Our starting point is the outcome or goal your organization desires. Whether it's increasing profitability, improving retention, aligning processes across locations, elevating customer service, or all of the above, we develop a strategy that will meet those objectives.



“NINE YEARS AGO, WE WERE INTRODUCED TO ONE OF OUR MOST VALUABLE PARTNERSHIPS. SEEKING TO INCREASE OUR LEVELS OF CLIENT SERVICE, RESOURCE PRO MET AND RAISED OUR VISION — FOREVER CHANGING OUR CULTURE!”

Patricia N. Clevenger, Executive VP – Finance, Marketing and Client Relations, CBIZ Stoltz, CBIZ Insurance Services Inc.

THE BENEFITS YOU CAN EXPECT

- **PROFITABLE GROWTH**
Without incremental increases in staffing.
- **IMPROVED CUSTOMER SERVICE**
Streamlining processes allows employees to anticipate customer needs, build customer intimacy, and ensure that routine functions are delivered accurately, consistently, and efficiently.
- **INCREASED PRODUCTIVITY AND PERFORMANCE**
Applying Lean best practices and with a focus on continual improvement and innovation, we'll optimize processes so that you can do more and do better with fewer resources.
- **STANDARDIZATION OF PROCESSES**
Across all your teams and locations, ensure that everyone is adhering to best practices and enabling seamless, compliant operations throughout your organization.
- **SMART STAFFING**
With an understanding of productivity and capacity, we'll help you place the right people in the right functions and with the right tools. This enables you to extract more value and profits from your accounts.
- **MAINTAINING COMPLIANCE**
Improve adherence to policies and processes to increase accuracy and reduce or eliminate E&O risk.

OPERATIONS OPTIMIZATION MODULES

Our team is made up of certified experts in operations optimization, applying methodologies that include Lean and Prosci Change Management, and bring decades of experience in the insurance industry, project management, and business. They'll be using all of their skills to understand your business objectives, processes, and people in order to transform your operations and provide you the foundation for profitable growth.

OPERATIONS DIAGNOSTIC - Through interviews, process observations, and review of your current operational data, we complete an initial diagnostic of your operations.

LEAN PROCESS MAPPING - Based on the diagnostic results, we collaboratively work with you to set priorities and focus the lean mapping program for the highest impact on process improvement.

CUSTOM SERVICES - We work collaboratively with your teams to help design and implement the operations improvement recommendations to ensure results are achieved.

LEAN PROCESS FUNDAMENTALS



Connecting strategy, goals, and business processes

Discovering more efficient ways of working



Delivering compelling value to the customer

Enabling people to lead and contribute to their full potential



DESIGNED FOR IMPACT

Whether you're driving growth, profitability, or scale, your business challenges aren't just tech problems. And they're not just talent problems, process problems, or data problems. They're all of the above—complex challenges that need complex solutions. In short, they're an integration problem. Our Integrated Solutions bring all the elements together—people, process, technology, and data—to solve your most complex business objectives.

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.

resourcepro.com