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Review: ReSource Pro

BY PAT ALEXANDER

I first heard about ReSource Pro from one of my clients in early 2007. They had seen a presentation by ReSource Pro at an industry event and were considering if they should use their service. My client asked me what I thought about them outsourcing some of their processing to China.

Frankly, I didn't know anything about ReSource Pro. I expressed doubt and concern. How would the staff in China know how to do the U.S. client's work? How would the work get to the Chinese staff and be assigned? What about quality control? What was the turnaround time? My client said I should meet the people at ReSource Pro and listen to their presentation.

In the summer of 2007 I met Dan Epstein, CEO of ReSource Pro, and Laura Downey, VP, Client Integration. Many of my questions were

answered during their presentation but I was still not fully convinced.

In early 2008, another one of my clients began asking me the same questions about ReSource Pro. They had scheduled a session with Laura to talk to their agency about possible processes they might want to send to ReSource Pro. My client asked me to attend to assist them in evaluating how they should proceed.

I am certainly no stranger to the struggles that an agency encounters when it comes to getting policies, endorsements, and audits checked and processed in a timely manner.

In addition, both of my clients each handled hundreds of flood policies—automatic renewals that must be processed in their system each year. This is time-consuming, low- or non-income

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generating work. I still had concerns, but had to remind myself to keep an open mind. After all, my Web site says:

“Pat provides information and experience to help turn threatening or unfamiliar situations into opportunities to enhance the client experience leading to better client retention and referrals.”

Here was a threatening and unfamiliar situation for my clients. It was important to keep an open mind and see if, in fact, this was an opportunity that could enhance both the agency’s staff and client experiences.

In the end, both agencies ended up using ReSource Pro. Today, they continue to ask what else they can send to ReSource Pro. Since learning about ReSource Pro, I have had the opportunity to work with them on a project and get to know a number of the individuals within the company.

In late October, a group of ReSource Pro clients and a few fortunate “insurance types” traveled to China for the first ReSource Pro Innovation Summit. I visited the ReSource Pro office in Qingdao, which provided me with the opportunity to watch the teams at work, get a more in-depth perspective from other ReSource Pro clients, and confirm for myself whether or not agencies should research and consider ReSource Pro.

Who Is ReSource Pro?

ReSource Pro was launched in 2003 by The Distinguished Programs Group (DPG), a New York-based insurance wholesaler with 20 years experience in agency operations. Struggling with rising operational costs and shrinking commissions, DPG established a processing facility in Qingdao, China to support agency back-office operations. Impressed by the speed, accuracy, and complexity of tasks performed by this team, DPG rolled out ReSource Pro to offer these benefits to other insurance-related agencies.

In 2003 they began with four employees. Today, that number has grown to 450. Later this year, they expect to have 1,000 employees. These numbers continue to increase due to ReSource Pro signing new clients and current clients engaging ReSource Pro for additional services.

How it works

ReSource Pro assigns dedicated processing specialists to each agency’s team. That team is trained to process work based on the agency’s workflow and systems. They connect remotely to the agency’s existing system usually through Terminal Server, Citrix, or the Internet to perform a variety of tasks in support of the agency’s staff. Team sizes grow incrementally, driven not by ReSource Pro, but by the agency’s needs, so the relationship is built on the agency’s comfort and confidence in ReSource Pro’s processing capabilities.

Security issues

With ReSource Pro, none of the agency's data ever leaves the agency's system. The ReSource Pro processing specialists use the agency's system directly by logging in remotely through a secure line. Access restrictions can be set and performance can be monitored. Should the agency ever decide to end the relationship, the agency need only change or delete passwords to maintain exclusive control and access to the agency's system.

ReSource Pro provides training to their staff on security and confidentiality and utilizes the most current anti-virus and firewall hardware and software to ensure the most secure and reliable environment for their clients.

Daily and monthly reports and performance metrics

ReSource Pro provides its clients with daily/weekly/monthly reports designed to allow their clients to easily monitor activity.

Performance metrics are established early on and performance is evaluated on a regular basis. With a very high level of performance monitoring and quality control supervision, ReSource Pro is able to offer its clients very low processing error rates.

IT infrastructure

ReSource Pro uses the latest computer, software, and communications technology. Each of their processing specialists uses at least two monitors to increase processing efficiency and reduce errors. To use ReSource Pro services, client agencies need only have very basic IT infrastructure:

- Broadband Internet connection
- Remote access via Terminal Services, Citrix, or Internet-based system
- Additional agency management system user licenses

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The future

The management team of ReSource Pro continues to assess and improve quality control and their information technology. They continue to look to the future with innovation in the products that they will define and offer to their current and future clients. A major focus is to constantly review the processes to find ways to improve and achieve workflow optimization. ReSource Pro is also in the process of developing a College of Insurance in order to provide continuing education specific to the needs of their staff.

Why you should consider

Many agencies find it very difficult to hire, train, and retain staff needed to perform many back-office tasks. In a sales-driven agency, the focus should be on sales, building and maintaining the client relationship, and providing the best service to the agency's clients. However, this often means that many processes suffer and fall behind. ReSource Pro does not intend to replace any of your current staff. Their goal is to provide the support needed for the current staff to become focused on sales.

An agency principle and I were recently having a conversation about ReSource Pro. I asked him for his thoughts on using such a firm. He said, "Economically, it makes perfect sense to me for agencies located in major metropolitan cities where the cost of this type of staff is high." I agree—and also think it makes perfect sense in markets where knowledgeable staff is not available.

I have worked with a number of agencies that use outsourcing to a certain extent. In the past, there have been firms that did policy issuance for MGAs. Agencies sometimes use



ONE MONTH FREE TRIAL!

ReSource Pro believes that to understand the benefits and capabilities of remote staffing, agencies need to experience it firsthand, so they provide a one-month, no-obligation, free trial before signing any contract.

During this trial, they identify with the prospective client a couple of tasks, write procedures, train a team leader in China, and process those tasks for one month. If they meet or exceed your expectations, chances are, you will sign up.

You may contact ReSource Pro at their New York corporate offices at 1-888-577-7552.

employees or independent contractors who work from home doing the types of processing work discussed here. My visit to ReSource Pro reinforces my opinion that they provide a needed service and that the service is very good quality. Using an outsourcing firm such as ReSource Pro is an innovative step that agencies should evaluate and consider. ☐

Patricia Alexander, CIC, is a Consultant, Coach & Mentor. Her many years of experience in retail agency and MGA settings gives her a broad range of knowledge in agency operations. She is dedicated to educating her clients on using their technology to enhance and build their business and profitability. Subscribe to Pat's Blog via her website www.patalexander.com. She may be reached at pat@patalexander.com.

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- ▶ You'll get an experienced middle-manager who will gently walk your rank-and-file employees through the essential learning necessary in order for your agency to integrate today's agency technology requirements.
- ▶ You'll get a big-picture, technology-savvy partner who intimately knows the "ins and outs" of the insurance industry (but a partner you never have to share profits with!).
- ▶ You'll get your own legal filing clerk and hot-shot attorney on staff, protecting you by making sure that you have full and necessary documentation at your agency's fingertips to protect not only you, but your clients, in the event of a potentially litigious "misunderstanding."
- ▶ You'll get a personal translator to communicate your tech needs into techie geek-speak so that your IT people are truly able to understand and implement what it is that you need.
- ▶ And probably, most important of all, when you subscribe to *The Anderson Agency Report* you'll get an organizational, efficiency, and strategic-planning expert working for you. Their job is to simplify, prioritize, and put into perspective the myriad of details (which can so easily bog an agency down!).

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