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[Agencies](#) | [Carriers](#) | [MGAs](#) | [Other](#)
 Search

[Home](#) | [ReSource Pro](#)

# ReSource Pro

ReSource Pro provides insurance organizations with targeted solutions that accelerate profitable growth.

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## OUR PARTNERSHIP

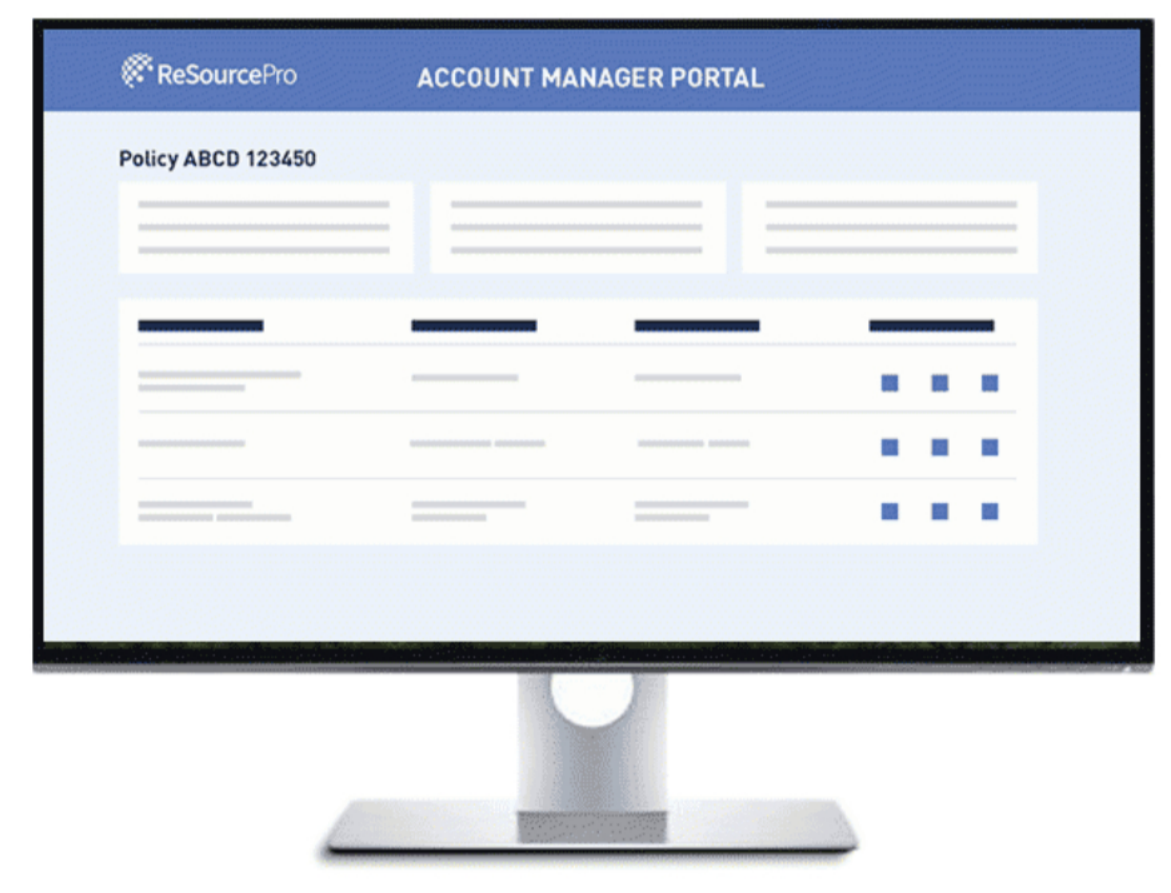
ReSource Pro provides agents and brokers with solutions to increase sales performance, deliver high quality customer service, and maximize insurance carrier partnerships. Included in our suite of solutions is Policy Insights, a tech-enabled platform that helps agencies streamline the policy checking process. Through our Vertafore Orange Partnership, we've integrated Policy Insights with one of the most tried and true agency management systems in the industry, Sagitta. This integration enables us to quickly retrieve policy checking requests from your agency management system, gather all documents associated with the policy check, and automatically provide you with a statement of record, resulting in a more cost-effective policy checking solution.



## Transform policy checking into a strategic advantage

ReSource Pro's Policy Insights equips insurance agencies with a tech-enabled platform that optimizes and analyzes the policy checking process, enabling them to deliver accurate policies more quickly, maximize time spent on revenue-generating activities, and detect systemic error patterns within their business.

We start by performing fast and accurate policy checking through a combination of automation and human audit. Agency account managers then review and address errors with the click of a button using our online Account Manager Portal. With the insights gathered by our analytics dashboard, agency operations leaders can even identify root causes of errors and monitor account manager performance, allowing them to make strategic moves with agency personnel and mitigate E&O risk.


[Learn more →](#)

## How does Policy Insights integrate with Sagitta?



**Task Identification** – Our API integrates with Sagitta to enable us to automatically identify any policy checking tasks you assign to ReSource Pro. This allows us to accelerate our turn-around time and enables you to mitigate E&O risk faster.

**Document Retrieval** – When a request is received, all documents associated with the policy check are retrieved from your agency management system automatically. In addition, human auditors ensure that any documents which do not follow correct name and location conventions aren't missed.

**Summary Delivery** – Once a policy check is performed and is reviewed in our online portal, a review summary is deposited into your agency management system. This summary shows you key information about the work, such as the discrepancies found during the policy check, actions taken by the account manager, and individuals who have been assigned with additional downstream steps.

"We really love the Policy Insights dashboards. They allow me to measure how we are doing relative to others in the industry. So far, we've seen a 30% reduction in errors."

Cindy Wolkiewicz, Director of Ops, Odell Studner

"We love the Account Manager Portal (AMP)! The team is already feeling relief and overall renewed energy on policy checks. The AMP makes it much easier to review discrepancies, and more importantly, move forward with reconciliation."

Operations Manager

## HOW POLICY INSIGHTS COMPARES

### INSURTECH

- Automation
- Human audit
- Customizable
- End-to-end policy processing
- Agency Management System alignment process
- Dashboard with actionable insights
- Streamlined review & downstream coordination

### OUTSOURCING VENDOR

- Automation
- Human audit
- Customizable
- End-to-end policy processing
- Agency Management System alignment process
- Dashboard with actionable insights
- Streamlined review & downstream coordination

### RESOURCE PRO'S POLICY INSIGHTS

- Automation
- Human audit
- Customizable
- End-to-end policy processing
- Agency Management System alignment process
- Dashboard with actionable insights
- Streamlined review & downstream coordination

## What's missing from most policy checking solutions?

We developed Policy Insights because many policy checking solutions simply don't cut it. Find out why and gain an overview of Policy Insights by downloading our eBook.

[Download the eBook →](#)


## We help shorten the runway for digital initiatives



The need to invest in digital transformation is high, yet studies show 70% of transformation initiatives fail to meet their goals. How can you move into the digital age with confidence? Leverage ReSource Pro's expert integration of digital capabilities, analytics, and operations management to maximize the impact of technology on your organization's efficiency-and profitability.

[Visit our digital page →](#)

Agents and brokers trust ReSource Pro to help them deliver world-class customer service, boost sales performance, and gain the most from their carrier partnerships. Find out how we can elevate your organization.

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