



POLICY**GUARD**

BY PROFORMEX



Private Client Group



**AUTOMATING POLICYOWNER
ENGAGEMENT TO CREATE
MUTUALLY BENEFICIAL OUTCOMES**

THE CHALLENGE

- + Today's insurance distributors need better tools for scalable client engagement
- + One Resource Group tried a few different solutions, none of which held up to their expectations
- + Industry has not focused on this in the past; limited technology available



+ THE SOLUTION



Proformex recognized the challenges faced by One Resource Group and so many other distributors and knew they were uniquely positioned to solve this challenge. They reached out to One Resource Group to introduce a new concept, called PolicyGuard, that would aim to transform the way distributors manage client engagement, making it a scalable, effective, and profitable activity.

Using automated, targeted, policy-specific alerts delivered directly to clients' inboxes, PolicyGuard drives policyowners to distributors at the time of action. Clients are kept aware of their critical policy events and distributors enjoy shorter sales cycles and getting to new commissions faster with less effort.

+ THE RESULTS

PolicyGuard alerts drove **immediate results** for the One Resource Group team. **Within weeks**, they saw:

+ **\$12K** in Won Premium

+ **\$10K** in Pending Premium

+ **146 Open Cases** → **\$1.4M** in Potential Premium

with clients interested in possible coverage changes (i.e. new policies, term conversions, life settlement opportunities)

“

PolicyGuard has been a tremendous success. We have never seen such immediate results with minimal time and effort invested on our end. These direct to consumer alerts have flipped our client engagement strategy on its head by bringing people to us when it's time to make a change, rather than jamming up our staff's time on outbound efforts to hunt these opportunities down. And perhaps most importantly, we now know that there aren't any risks or opportunities left untouched in our book of business.

Through PolicyGuard, we can confidently say that we are staying ahead for our clients, protecting their investments in insurance, and delivering the results they expect with their coverage.”

– **Tony Wilson, EVP, One Resource Group**



About One Resource Group

One Resource group was created in 2002 with the idea that one company could provide a level of service unmatched in the industry. They wanted to put together a team of highly skilled and highly motivated people that would work tirelessly to make the brokerage experience better for agents and producers. As President, Todd Stewart wanted to create a business model that allowed clients to use ORG as a one stop shop for all their service requirements for life insurance, long term care, disability, critical illness and annuities.

They offer a vast range of insurance services, including case design, case management, advanced markets and experienced underwriting. ORG strives to partner with clients to expand their business and continue to lead the industry in knowledge and innovation. Twenty remarkable years later they are extremely excited about the future of the company and the industry they work in. ORG looks forward to continuing to earn the respect of partners, peers, and agents.

About PolicyGuard

PolicyGuard is the marketing engagement tool that brings distributors, policyowners, and insights together to create mutually beneficial outcomes. Automating targeted, policy-specific alerts helps initiate the right conversations at the right time. Using PolicyGuard, distributors can shorten sales cycles and generate new commissions faster than ever before.

