

## Problem

This mutual life insurance company began receiving interest from private exchange operators to partner and ultimately sell products through a more powerful channel. The client was looking for a consultant who could **develop an informed overview of the private exchange marketplace, propose possible strategic approaches for entering the market and recommend potential partners.**

## Response

Jacobson was able to provide a qualified consultant with broad health insurance expertise. This professional possessed vast experience with **health exchanges, CO-OPs and consumer-driven health plans**, as well as knowledge of **healthcare reform, organizational development, strategic planning and non-profit management.** Previously, this expert built an early prototype health exchange in Northeast Ohio, which covered more than 80,000 employees in 12,000 businesses throughout the region. Additionally, this consultant built a prototype of an IT-enabled platform and process for a large regional broker.

## Solution

The consultant designed and executed **business development strategies for 4,000 U.S.-based credit unions with over 12 million existing customers and a base of 55 million potential customers.** The expert then formulated a plan to enable the company to partner with private health exchanges to sell life, health and disability products via a private exchange strategy. The proposed plan **projected \$5.7-10 million in new revenues in individual health insurance sales alone by year three** and will greatly enhance the organization's web-based marketing capabilities while creating new cross-selling opportunities.

Operations

# Healthcare Reform Consultant

**Client Type:** Health Plan

**Project Scope:** Healthcare Reform Plan

**Duration:** 9 Months

**Team Size:** 1 Part-Time Consultant



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