

Accounting/Finance

Interim Finance Leader

Client Type:

Health Insurance Organization

Project Scope:

Process Review and Improvements

Duration:

2.5 Months

Team Size:

1 Full-Time Employee



Problem

This captive third party administrator within the health insurance space had gone through a technology and process transition, creating a need for an interim finance leader. The organization was looking for an executive-level consultant who could **assess the company's financial processes and recommend improvements**. The individual was expected to review the company's current financial practices and provide a detailed action plan to move forward. Since this assignment involved multiple meetings and delicate discussions, the client required the consultant to work on-site.



Response

Jacobson provided a former **Chief Financial Officer with extensive experience** with Statutory and GAAP financial audits within the health insurance space. This consultant was knowledgeable about Medicare and Medicaid and had worked in managed care organizations and health plans for more than 20 years.



Solution

The candidate Jacobson provided **consistently exceeded the client's expectations**. The consultant thoroughly reviewed the company's current financial processes and recommended steps for streamlining and overall improvement. The client was so pleased, the candidate was asked to stay on assignment for an additional two months to take on additional projects.

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