

# Large Group Underwriter

**Client Type:**  
Health Plan

**Project Scope:**  
Managing Large Book of Business

**Duration:**  
1 Year 9 Months

**Team Size:**  
1 Full-Time Employee

## Problem

This health plan was making a major systems upgrade and wished to assign an underwriter to the project. The client was in need of an experienced group underwriter to **manage a large book of business** in place of the underwriter assigned to the system upgrade project.

## Solution

The consultant successfully **optimized the company's margin/membership balance** while supporting the appeal process with timely responses to sales. **Expert organization skills** allowed the individual to regularly complete **effective summaries for management review**. The candidate Jacobson provided consistently exceeded the client's expectations, which led to several assignment extensions.

## Response

Jacobson quickly identified an organized, resourceful manager with nearly 30 years of leadership experience in group insurance environments. This individual's specific strengths' including underwriting methodology development, creative problem solving, staff training, and the ability to think outside the box allowed for minimal training and the ability to begin the task at hand immediately.

