

Claims

Senior Life Claims Consultant

Client Type:

Specialized Individual Life Carrier

Project Scope:

Life Claims Policy and Procedure

Duration:

3 Weeks

Team Size:

1 Full-Time Claims Expert



Problem

Due to its geographical location, this small life insurance organization was finding it **difficult to recruit talent with the functional expertise** they required for their critical business needs. This ultimately led to an internal claims department with minimal claims experience. After receiving an outside assessment of the department, the company's president decided to bring in an outside source to **train the staff and ensure policies and best practices were being followed.**



Response

After evaluating the carrier's needs, Jacobson identified a claims expert with more than 25 years of experience. This individual had the **claims process and functions expertise** that the company was seeking.



Solution

After two weeks of shadowing the current staff, the claims consultant **provided a full evaluation** and worked with their president to determine an appropriate timeline for executing the next steps. The consultant then re-wrote position descriptions and made updates to the internal process manuals. The expert also **designed a strategic hiring process** and provided staff with an **easy-to-follow policy and procedure manual** to use for future training and reference.