



riskinternational

CASE STUDY

\$3.4+ MILLION

SHAREHOLDER
VALUE CREATION

2 MONTHS

SPEED OF CAPTURE

INDUSTRY
TECHNOLOGY

EMPLOYEES
650

LOCATION
TEXAS

CLOUD SOFTWARE TECHNOLOGIES

\$900 MILLION PRIVATE EQUITY OWNED

ENGAGEMENT

- Engaged in November to support January renewal evaluation due to lack of credibility and concerns with new broker team.
- Evaluated broker's RFP for Rx and stop-loss, both summaries were misleading the financials to keep the business with incumbent suppliers.
- Analyzed broker's UW methodology which was flawed and misrepresenting projected claims.

RESULTS

- Recommended carved-out PBM, new stop-loss supplier, and removal of aggregate insurance.
- Moved dental from fully-insured to self-funded.
- Negotiated broker compensation.

FACILITATED **\$343K** IN
FIRST YEAR SAVINGS

REDUCE RISK | REALIZE REWARD

riskinternational.com