

## CURCIO ✦ WEBB

## Curcio Webb Leads a 60,000-life organization through a transition from internal to co-sourced benefits administration.

### Situation

A large and diverse Fortune 500 organization has a unique, strong culture of caring for employees, using internal staff to manage their health and welfare (H&W) administration and customer service. However, over the years, plan design became more complex, compliance requirements grew, and technology expectations shifted. Plus, staff was being asked to manage a growing list of other business initiatives. The company engaged Curcio Webb to explore H&W outsourcing and evaluate potential administration delivery partners.

### Challenge

The organization needed to understand their outsourcing and co-sourcing options, and the financial investment and responsibilities of each option. Any service provider they selected needed to have significant experience transitioning first generation outsourcing clients. Change was not going to be easy. Because of their employee-centric company culture, they were skeptical that an outsourced provider should supply the high level of employee support they expected. They wanted to retain the option of supporting employees internally. They also needed a provider who could wrangle the needs and expectations of the internal stakeholders, from finance to customer service.

### Process

Curcio Webb worked with key stakeholders to gain a clear understanding of the technological, financial, cultural challenges they faced with H&W administration. This allowed Curcio Webb to then identify the most suitable delivery model and create a short list of potential service providers. Curcio Webb then developed a comprehensive Request for Proposal with a comprehensive scope and targeted questions designed to focus on specific areas of concern.

In parallel to the provider evaluation, Curcio Webb developed a comprehensive accounting of current delivery costs, including hidden expenses like claims leakage resulting from inaccurate eligibility.

Curcio Webb delivered a comprehensive business case outlining how outsourcing of key functions would deliver desired strategic, financial, service delivery, and compliance results while maintaining their beloved company culture.

### Results

In the end, the company decided to co-source H&W benefits administration. Curcio Webb provided overall implementation project management, overseeing the transition to a new administration delivery model. The new service provider is now managing all aspects of H&W administration except customer service, which is still managed internally with upgraded technology.

All parties involved consider this project to be a great success. Curcio Webb built a sound, objective business case for the new delivery model, based on projected cost savings and an improved employee experience.

### Are you considering a H&W administration change?

Curcio Webb provides independent, objective guidance about outsourcing and co-sourcing options.

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