

## Problem

Our client is in the process of implementing a major modernization initiative spanning multiple functions including policy administration, underwriting, claims, rating and more. Simultaneously, the carrier is completing acquisitions at a cadence of one to two per month, necessitating additional operational support. Internal recruiting and other vendors struggled to find professionals who combined the right technical skill sets with hands-on insurance operations expertise.

## Response

Jacobson delivered targeted, property and casualty-focused talent through a rigorous, multi-step screening process that ensured both technical alignment and cultural fit. We sourced and placed three consultants—Business Analyst, Process Optimization Specialist and Operations Project Manager—each with deep carrier experience and hands-on modernization expertise across policy administration, underwriting, claims, and rating.

## Solution

Together, Jacobson's consultants drove continuous process improvements and operations-focused project management to stabilize day-to-day work, advance the modernization program, and support integration efforts. The client expressed high satisfaction with the consultants' performance and plans to convert all three to full-time employees in 2026. Jacobson has since been entrusted with additional openings and continues to support the client's evolving needs.

Operations

# Cross-Functional Modernization

**Client Type:** Regional Property and Casualty Carrier

**Project Scope:** Modernization Support

**Duration:** Ongoing

**Team Size:** 3 Full-Time Consultants



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