THE
TAYLOR FELDMAN
GROUP LLC

Erik Taylor
(916) 601-8542
erik@taylorfeldman.com

David Feldman
(530) 400-5470
david@taylorfeldman.com

Analytic Consulting Services For Brokers

The Taylor Feldman Group provides brokers with a full range of medical benefits analytic consulting. With our services, brokers can confidently sell and support a more comprehensive, more customized set of products for their self-insured cases. Our in-depth quantitative and managed care expertise allows you to:

- Produce analytic work more efficiently and consistently
- Effectively compete against other brokers
- Focus on business development activities and attract and retain more business

We are managed care experts and bring more than 20 years of experience providing data-driven analytics, consultation, reporting and strategic planning to group health and workers compensation clients. We know how the health care industry really operates, and we know how to see through the marketing to identify what works and what doesn't among the many products and vendors in the health benefits arena.

We work side by side with you to add value to your business and clients at all points in the client relationship. We help you sell and retain more business by demonstrating the quantitative and qualitative difference in your product offerings. We provide evaluations of vendors to help select high value third party administrators, PPO networks, clinical management, and stop-loss carriers. We deliver in-depth analytics to position the sales package with your prospects and report results to your clients. Upon request, we present with you at prospect and client meetings.

Our services allow you to focus more time on building and maintaining client relationships, identifying client specific needs, and developing customized product packages that meet those needs.

Our Analytic Service Offerings

Baseline Assessment
Our baseline analysis is a detailed review of your self-insured cases. As part of this review, we assemble and organize existing information about each case. This review enables us to learn case-specific details and also survey existing vendor/partner relationships.

For each vendor/partner, we work with you to establish performance expectations. These serve as the basis for tracking performance over time and across vendors in any given industry segment.

We also review your existing standard RFP questions and selection process of vendors and provide detailed feedback regarding:

- Clarity and completeness of questions
- Areas where responses can be manipulated by respondents
- Improvements to increase reliability of information gathered

Annual Case Review
For each key case we provide a comprehensive annual analytic review and report. This review, based on reports received from all the managed care vendors, identifies key trends and issues facing the case.

We provide a written summary, including graphics, presenting the key facts as well as industry-savvy interpretations and recommendations. This package is customized to reflect the needs of both you and the client (case).

We will also, on request, attend client meetings to present the information and support you by answering questions that may arise.

Quarterly Case Review
Quarterly Reviews supplement the annual review by providing more timely information. We review all information received from the medical benefits vendors and provide a 1-2 page overview that identifies any significant events or trends.

On-Demand Quantitative Review
When needed, we provide expert review of any quantitative information presented to your customers. Sometimes numbers are used to confuse, rather than clarify, key issues. When confronted with complicated or conflicting statistics or guarantees, we provide you with serious technical backup, giving you confidence to move ahead on the business issues.

RFP Support
When it is necessary to send out an RFP, we provide the quantitative expertise required to evaluate responses. For each RFP, we work with you to:

- Ensure the appropriate questions are asked
- Identify respondents
- Evaluate and score proposals received

We can also develop an RFP database and tools which provide comparisons of key measures across your possible vendors specific to prospect locales – including PPO network and disease management program comparisons.

We focus on the quantitative side of the RFP process, freeing you to concentrate on the important relationship factors that go into a successful working partnership.

Prospect Support
When trying to land a large self-insured prospect, it can be important for a broker to demonstrate the resources that they can bring to the table when discussing health benefits. We provide this support by attending key prospect meetings to discuss issues of interest.

In-depth Research
To deliver maximum value to your clients, and to win new self-insured prospects, you need to keep abreast of industry trends and understand the key players and products. We provide quarterly research that identifies best-of-breed products in various health management sectors. In addition, this research serves as a basis for identifying appropriate respondents when it is necessary to send out an RFP.

Decision Modeling Services
You may have access to third party benefit valuation or other decision support models. While these models can be valuable, they often are difficult to master and time consuming to run, analyze and present the results. Our extensive experience developing these types of models means we can efficiently run and present results, allowing you to provide your customers with relevant information.

Ad hoc projects
Routine analytic support is often all that is required to satisfy clients. However, sometimes more is needed. As part of our standard service, we will work with you and your client to develop the business issue to the point of analysis. The product is a document outlining the background of the issue, the objective for the analysis, a detailed approach section including identification of necessary data, and an estimate of work and additional TFG cost.

Broker Value Proposition
How do you demonstrate the value you bring to your customers? We work through a series of structured meetings to help you articulate your value propositions. Based on these results, we identify possible metrics and begin gathering data. You can then use these metrics both for internal quality purposes as well as for external marketing needs.

Actuarial Services
We provide actuarial support for setting contribution levels, making reserve recommendations, and suggesting stop loss strategies. By performing the calculations ourselves, and only contracting for actuarial review, we can provide this service for a reasonable additional fee.