Turning a Strong Benefits Program **into a Better One**

Story Overview

A Pacific Northwest technology consulting firm with roughly 200–300 employees was operating with a solid self-funded, unbundled benefits program, so this was not a turnaround situation. Instead, the opportunity was to help a growing, acquisition-active organization determine whether its current broker could still meet its evolving needs and whether meaningful plan improvements were available.

Challenge

The client's existing arrangement was working well enough that change was not an obvious decision. That made the situation complex: IMA had to demonstrate added value beyond standard service, navigate internal resistance to switching brokers, and prove that projected savings were credible even when the incumbent challenged them. At the same time, the client's growth, acquisitions, and international activity were increasing the need for broader advisory support than the status quo appeared to provide.

> Delivering meaningful gains beyond the status quo.

IMA's Strategy and Actions

IMA's employee benefits team acted to support the client by:

+ Building trust over time with HR leadership through consistent, relationship-driven engagement before entering a formal review process.
+ Using broader service capabilities to show where IMA could add value beyond brokerage, including due diligence support tied to acquisitions and guidance on global benefits considerations.
+ Conducting a deeper technical review of the client's self-funded, unbundled program to identify a specific opportunity in the pharmacy benefit manager arrangement.
+ Presenting a national cooperative PBM option and pressure-testing the analysis to ensure the savings comparison was credible and apples-to-apples.
+ Bringing together sales, strategy, and account management expertise so the client received both consultative guidance and technical support throughout the decision process.

Why It Worked

IMA's approach was effective because it combined patience, credibility, and technical rigor. The team did not rely on a quick sales pitch or on broad service promises alone; they earned trust first, then backed that trust with data, thoughtful consulting, and a willingness to stand behind the proposed solution. That combination helped the client become comfortable making a change despite internal hesitation and competing narratives from the incumbent.

Key Takeaways

This story shows that some of the strongest wins come from improving an already-functional program, not fixing a broken one. Other IMA teams can learn from the importance of long-term relationship building, cross-functional collaboration, and pairing differentiating service capabilities with a concrete financial finding.

THE RESULT:

IMA won the business in September 2024 after presenting roughly $450,000 in projected PBM-related savings, along with additional compensation-related savings. Beyond the dollars, the client gained a more consultative partner and broader support for a growing, more complex organization.