

# CASE STUDY

*"The process, from start to finish, is going to benefit your plan."*

In 2010, a major energy company ("Client") prepared to handle an especially complicated case involving subrogation and its self-funded health care plan. At the time, its third party administrator's subrogation vendor was handling the case, but Client's benefits manager was leery of the work being done.

"The TPA's subrogation vendor didn't keep us abreast of things," the benefits manager said. "They couldn't give us answers when we asked for things, and their reports weren't thorough. We didn't have the confidence that they were doing the right things for our plan."

## SEEKING LEGAL COUNSEL

Client didn't have the in-house legal resources to handle the case, so it sought expert opinions on how to navigate the situation. As Client sought counsel, it found Tom Lawrence, an attorney and CEO of Benefit Recovery Group. His experience surpassed that of any other attorney in the industry. In fact, Tom has tried more subrogation cases than any other attorney in the United States.

Because of his experience, Client chose Tom to provide legal counsel and help settle its long-standing subrogation case. He diligently worked alongside Client to navigate the case and settled it to the company's satisfaction.

As Client's senior benefits manager reflected upon the case, she immediately recognized how differently Tom handled the subrogation case compared to their existing subrogation vendor. While he had been transparent and worked in the best interest of the plan, she couldn't say the same for the TPA's subrogation vendor.

## REVIEWING SUBROGATION RECOVERIES

Her dissatisfaction with the way the plan's subrogation vendor handled the legal aspects of subrogation caused her to take a hard look at subrogation recoveries during their 12-year partnership. The data was clear and unsettling – Client was recovering a fraction of the subrogation funds it was rightfully owed.

It was immediately apparent to Client's benefits manager that partnering with a new subrogation vendor was in the best interest of the plan and its members, so she elected BRG as its subrogation vendor.

"The deciding factor was that subrogation is Benefit Recovery Group's sole business," she said. "For a big corporation like our third party administrator, subrogation was a sidebar."

## SEEING RESULTS

Since the partnership between BRG and Client began nearly five years ago, Client's benefits manager has been incredibly pleased. The onboarding and transition process was seamless, requiring little from her or her budget.

"Benefit Recovery said it would take little time to see an increase in recoveries," the benefits manager added. "Sure enough, they were right. It's more than doubled – no, probably tripled – the recoveries."

While BRG's legal counsel and increased recoveries helped foster a relationship with Client, the benefits manager is most impressed by the way BRG handles its business. BRG uncovers significantly more subrogation opportunities without having to ask questions of her or her plan members. When cases arise, she's notified and BRG provides documentation supporting any counsel they provide. Ultimately, BRG makes her job easier.

"There isn't any hands-on work I need to do with them," she said. "From the beginning, Benefit Recovery Group took the ball and ran with it, and they do an excellent job from start to finish. They are handling their business extremely well, which is good for me."

Client's benefits manager has become an avid supporter of BRG. She actively recommends BRG to her peers, and she speaks highly of their work to other industry professionals.

"Any manager of a self-funded plan can't go wrong going to Benefit Recovery Group," she said. "I've talked to other companies who have asked about subrogation recoveries, and I've always recommended BRG very highly. The process, from start to finish, is just going to benefit your plan."

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