



# Client Success Stories

## Special Projects

### Proven Operational Excellence at Scale

Employee Pooling has partnered with multiple clients to execute high-volume special projects that would overwhelm traditional in-house operations. These projects demonstrate our ability to deliver scalable operational support, maintain accuracy under pressure, and execute complex projects within strict timelines, all while enabling clients to focus on strategic growth.

## 475,436

Total Transactions  
Processed (over 2 years)

## 124,450

Largest Single Project  
(transactions)

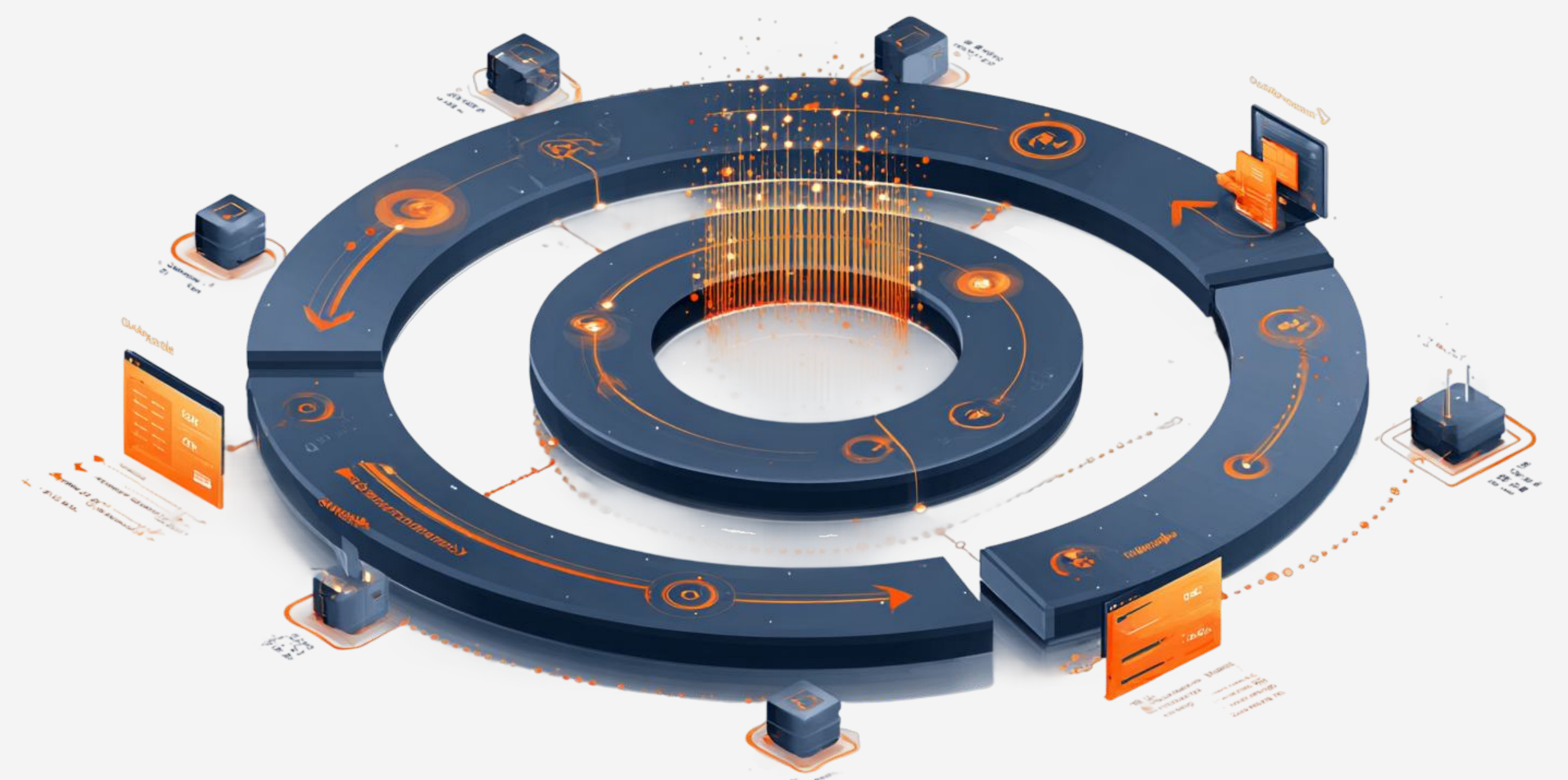
## 395-124,450

Project Scope Range  
(transactions per engagement)

### What Our Clients Achieved

Employee Pooling helped organizations realize measurable operational transformation:

- ✓ Improved Operational Efficiency
- ✓ Reduced Administrative Burden
- ✓ Increased Scalability and Productivity
- ✓ Maintained Turnaround Timelines and Accuracy
- ✓ Shifted Focus to Higher-Value Strategic Priorities



### The Employee Pooling Advantage

Your Special Projects success stems from three core capabilities:

- ✓ **Scalable Staffing:** We expand and contract operational capacity based on project scope, timeline, and complexity. No hiring delays. No training ramp-up lag.
- ✓ **Process-Driven Execution:** Each project is structured with clear workflows, quality checkpoints, and reporting protocols that maintain transparency and accountability.
- ✓ **Operational Expertise:** Our team brings insurance-specialized knowledge to every project, ensuring compliance, accuracy, and understanding of industry-specific requirements.

You gain operational relief exactly when you need it most, maintain full oversight of execution, and reclaim internal capacity for activities that drive competitive advantage.

### You Success is our Commitment

Employee Pooling delivers measurable results across the insurance and financial services industry.

The question isn't whether you can execute a large-scale special project. It's if you should dedicate internal resources to it when a proven operations partner can deliver faster, more efficiently, and without disrupting your core business.

*"Great job setting up this portfolio!"*

*"Thank you for keeping our New Business queue under control during this holiday week!"*

*"We appreciate your willingness to take on this project."*



Learn more about  
Special Projects

**Ready to discuss how Special Projects support  
could transform your operations?**

[employeepooling.com/contact](https://employeepooling.com/contact)



Employee  
Pooling



# Client Success Stories

## Special Projects

Across six distinct client engagements, Employee Pooling delivered specialized back-office support that absorbed high-volume complexity, reduced operational strain, and produced measurable results, regardless of project scope or timeline constraints.



### Paid-Up Policy Processing

#### Special Project 1: Challenges

Required scalable operational support to manage 60,000 paid-up policy cases while maintaining processing accuracy and turnaround timelines.

#### Back Office Solutions

- ✓ Paid-up policy processing support
- ✓ Policy validation and quality review
- ✓ Workflow management and backlog reduction
- ✓ Productivity improvement and turnaround management
- ✓ Daily reporting and operational tracking

#### The EP Impact

- ✓ Processed 50,250 paid-up policy cases
- ✓ Expanded support from 2 to 3 FTE



### Life Settlement New Business Processing

#### Special Project 2: Challenges

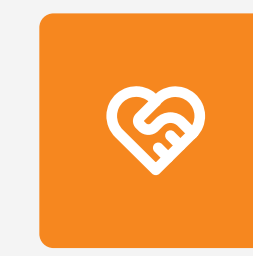
Faced challenges managing high-volume email requests, record creation and updates, and document scrubbing.

#### Back Office Solutions

- ✓ Life Settlement new business processing
- ✓ Request prioritization and workflow coordination
- ✓ Document management and case handling
- ✓ Communication support and backlog clearance
- ✓ Operational tracking and reporting management

#### The EP Impact

- ✓ Processed 13,719 Life Settlement cases
- ✓ Successfully managed backlog clearance and priority requests



### Policy Corrections & Suspense Processing

#### Special Projects 3: Challenges

Required support for urgent policy corrections, commercial policy updates, suspense processing, and Download Task Queue management within strict deadlines.

#### Back Office Solutions

- ✓ Policy correction and validation support
- ✓ Commercial policy update processing
- ✓ Suspense transaction management
- ✓ Download Task Queue processing
- ✓ Backend workflow and reporting operations
- ✓ High-volume policy processing support

#### The EP Impact

- ✓ 395 policy corrections in one day
- ✓ Updated 1,927 commercial policies within two weeks
- ✓ Processed 124,450+ suspense transactions
- ✓ 5,004 Download Task Queue policies



### Annuity Inforce Policy Servicing

#### Special Project 4: Challenges

Needed scalable operational support for high-volume annuity inforce policy servicing, carrier follow-ups, policy tracking, and reporting activities.

#### Back Office Solutions

- ✓ Annuity inforce policy servicing
- ✓ Carrier coordination and policy tracking
- ✓ Workflow optimization and reporting support
- ✓ Scalable staffing expansion
- ✓ Operational productivity management

#### The EP Impact

- ✓ Processed 121,618 annuity inforce policy cases
- ✓ Expanded operational support to 6 FTEs



### Large-Scale Beneficiary Record Updates

#### Special Project 5: Challenges

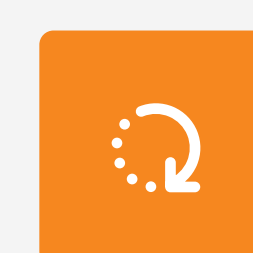
Required support for large-scale beneficiary record updates while maintaining validation accuracy and reporting consistency.

#### Back Office Solutions

- ✓ Beneficiary servicing and record updates
- ✓ Policy validation and quality checks
- ✓ Reporting management and workflow tracking
- ✓ Administrative processing support
- ✓ Large-scale data update management

#### The EP Impact

- ✓ Updated 25,144 beneficiary records across large-scale policy projects



### High-Volume Suitability Cleanup

#### Special Project 6: Challenges

Needed dedicated resources to complete high-volume suitability cleanup and record creation projects.

#### Back Office Solutions

- ✓ Suitability cleanup and record creation
- ✓ Data validation and quality review
- ✓ Workflow monitoring and reporting management
- ✓ High-volume record organization
- ✓ Dedicated operational team support

#### The EP Impact

- ✓ Completed 40,000 suitability cleanup records within four months using 11 FTE



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