



Case Study: Strategic Discovery Process

TRISURANT

INDUSTRY

B-to-B

ABOUT THE CLIENT

TriSurant, formerly known as Health Administration Services, was a third-party administrator (TPA) looking to transform the Company into a full-line benefits firm with a product line that includes core benefits, wellness programs, and risk management solutions. The company was under new management.

Employee Benefits Firm Selects Valmark Associates for Repositioning Assignment

Opportunity: The firm hired Valmark Associates LLC to help transform the company from a TPA to a full-line insurance company in three markets: Houston, Dallas and San Antonio, Texas. In addition to a pending name change, the firm was adding a line of products and services that would transform the company into a mini “BlueCross BlueShield”. The existing website did not yet portray the firm as a true, full-line employee benefits firm. Brokers were used to reach the target audience of Human Resource Employee Benefits Managers.

Our Role: Valmark Associates utilized its Strategic Discovery Process to help determine how the firm should be positioned among their target audience. In addition, the firm had to decide on a new name, and the process helped in this area also. The process began with interviews with senior management, and this was followed by a series of focus groups in Dallas, Houston and San Antonio with human resource managers and benefit brokers. A GAP analysis helped decipher differences between management and the target audience. The focus groups brought significant new information to the decision process. The groups also helped us to identify differences between what management perceived was important and what the target audience indicated was important in their decision to select an employee benefits firm. Management came

“Joe has done work and projects for me on several occasions over the last 8 years. Each project was planned and executed on time, on budget, and with great results.”

Craig Peterson, SVP, Marketing, TriSurant

to the realization that they needed a fresh start with brokers and the research helped to identify key deliverables that were important to them.

Valmark Associates participated in ideation sessions that created the new name for the company. Management chose a combination of words for the new name (as opposed to a descriptive name), arriving at TriSurant. Valmark subsequently developed the new logo and tagline, *Discover the difference*, which again, reflected the key message the management team wish to convey.

Result: The Company launched the new name, TriSurant, along with its website, to the target audiences, supported by a public relations effort. The website conveyed the new benefit offerings, and provided a ready source of information for the target audience as well as Human Resource Managers. These efforts helped to transform the former third party administrator into a full-line employee benefits firm.

This material is the sole property of Valmark Associates LLC and must not be copied and in any way provided to anyone other than the audience it is intended.