

# Workshop G – How to Use Data for a Wellness Strategy that Gets Results



Health**Works**

Building **Healthy** Worksites

# Welcome



**CHERYL MUELLER, CBC, CEBS**  
President & Managing Principal  
HORAN

*“ We champion **bold** innovation backed by data to help employers and individuals thrive. ”*

## THE HORAN WAY

*Fundamental #23: Embrace Growth*

# Today's Presenters



**RAKEL KEANE**  
Health Management Director  
HORAN



**DENISE FLICKNER**  
Founder & CEO  
HealthWorks



## **Log in to Poll Everywhere**

To present live activities, please log in to your Poll Everywhere account in a separate window.

[Launch log-in window](#)

# State of the Union

*Inflation & The Complexity of Health Care*

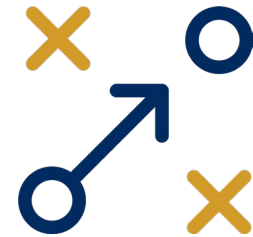
## WHAT CAN YOU DO NOW?



**CONDUCT A  
POPULATION ANALYSIS**



**GET SERIOUS ABOUT  
IMPLEMENTING  
MARKETPLACE SOLUTIONS**



**KNOW YOUR  
NUMBERS**

# State of the Union

## Workforce Burnout – HR Professionals

“**42%** of teams are ***struggling under the weight of too many projects*** and responsibilities, according to a survey of 726 HR practitioners in seven countries last year<sup>1</sup>. Among HR leaders who said they were emotionally exhausted, more than ***two-thirds blamed it on being overworked***, and more than **40%** said it was because they needed additional headcount to meet their business goals<sup>2</sup>.

”

[1] SHRM, March 14, 2022 [2] report by Lattice, a provider of HR software solutions



# State of the Union

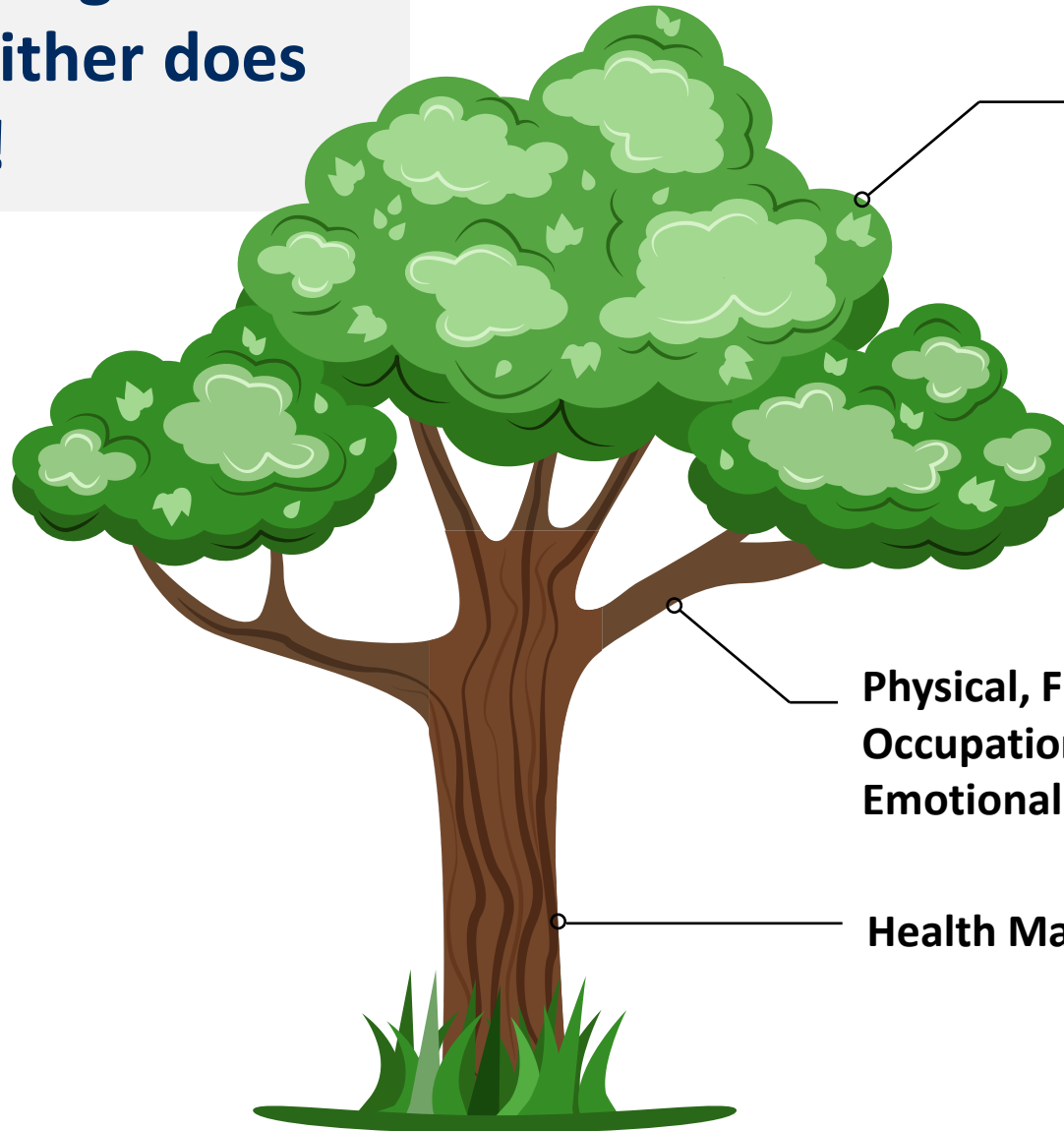
## Workforce Burnout – Employees

“ **60%** of U.S. workers are experiencing burnout - and the more stressed and exhausted employees felt, ***the more likely they were to look for a new job.*** Of those who said they were extremely likely to look for a new job in the next six months, **55%** said they ***always*** feel burned out<sup>3</sup>. ”

[3] July 2021 survey by The Hartford



**Trees don't grow over  
night--neither does  
wellness!**



**Action Plan:**  
*Leadership,  
Culture, Health  
Awareness,  
Communication,  
Incentives*

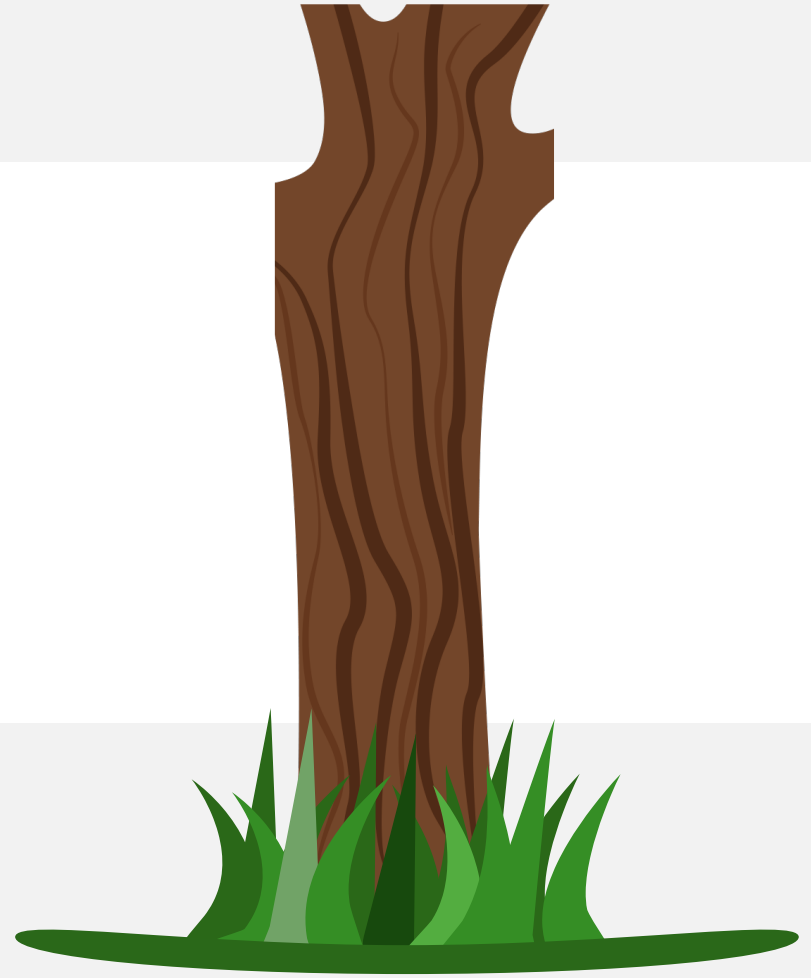
**Physical, Financial, Social,  
Occupational, Spiritual,  
Emotional**

**Health Management**



# Foundations of Wellness

*Breakout Session*



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# Foundations of Wellness

*Breakout Session*

**1**

*How do you DEFINE and MEASURE success of your wellness program?*



# Health Management Way

## Health Management Continuum

- Segments client wellness programs into four phases to help define philosophy, approach and best practices.
- Allow clients at any phase of the continuum to build a custom approach that meets their overall business strategy based on their culture and objectives within their wellness program.



# Health Management Way

## 5 Key Components



*Leadership & Culture*



*Marketing & Communication*



*Health Awareness & Participation*



*Spousal Inclusion & Incentives*



*Metrics to Track Progress & Tracks*

# Measuring Return on Investment

## Three Key Metrics



1. Participation level of your employees and covered spouses in the health awareness campaign
2. Improvement in the prevalence of health risk and medical conditions for the COHORT group of participants
3. Cost trend for the total health care cost per employee



## Establish A Health Management Action Plan

- Meet with leadership to determine strategic program goals and objectives.
- Leverage both carrier and wellness vendor data to build a repository of metrics to track and evaluate program success.

# Measuring Return on Investment



## Annual Review

- Review health management data on a quarterly basis to identify gaps and opportunities for improvement.
- Data serves as the guidepost for the health management strategy
- Helps prioritize key initiatives based on top modifiable risk factors as well as clinical and pharmacy trends.



## Communicate Results

- Develop a dashboard of key metrics to share with leadership and the organization annually.
- Demonstrate the wellness program's clinical and financial impact on the bottom line and the potential cost savings for employees.

# Cracking the Code



## Participation Matters

- 5% of your population often accounts for 50% of your cost.
- Build a plan to achieve 90% participation in your health awareness campaign to ensure the population that drives cost is aware of their health.



## Include Spouses in Your Health Awareness Campaign

- Spouses enrolled in the medical plan typically account for 26% of total health plan spend and are 25% more costly than employees.
- Make sure spouses are equally as aware of their health as employees.



## Remove All Barriers to Health Awareness

- An annual primary care visit typically includes lab work however; offering an onsite biometric screening opportunity is the easiest and most convenient way to achieve high engagement.

# Case Study: Government Sector



## The Outcomes

- Biometric screening participation for employees and spouses increased from 44% to 90.8% in the first year.
- Achieved negative renewal rates for two consecutive years by 3%.
- Improved overall health of employee population.

## The Work

The HORAN Health Management Way: A process created to help clients:

- Assess their current challenges & desired outcomes
- Build a comprehensive plan
- Commence the action plan
- Determine Results by analyzing the plan's effectiveness

## The Why

- Provided expertise to help align county leadership with the proposed wellness strategy and implementation
- Implemented tiered premium rates to incentivize biometric screenings for both employees and spouses
- Effectively communicated incentive changes to workforce



# Case Study: Manufacturing



## The Outcomes

- 88% participation for employees and spouses since launching in 2016
- Three Year Average Renewal of <0%
- Four early detections of prostate cancer

## The Work

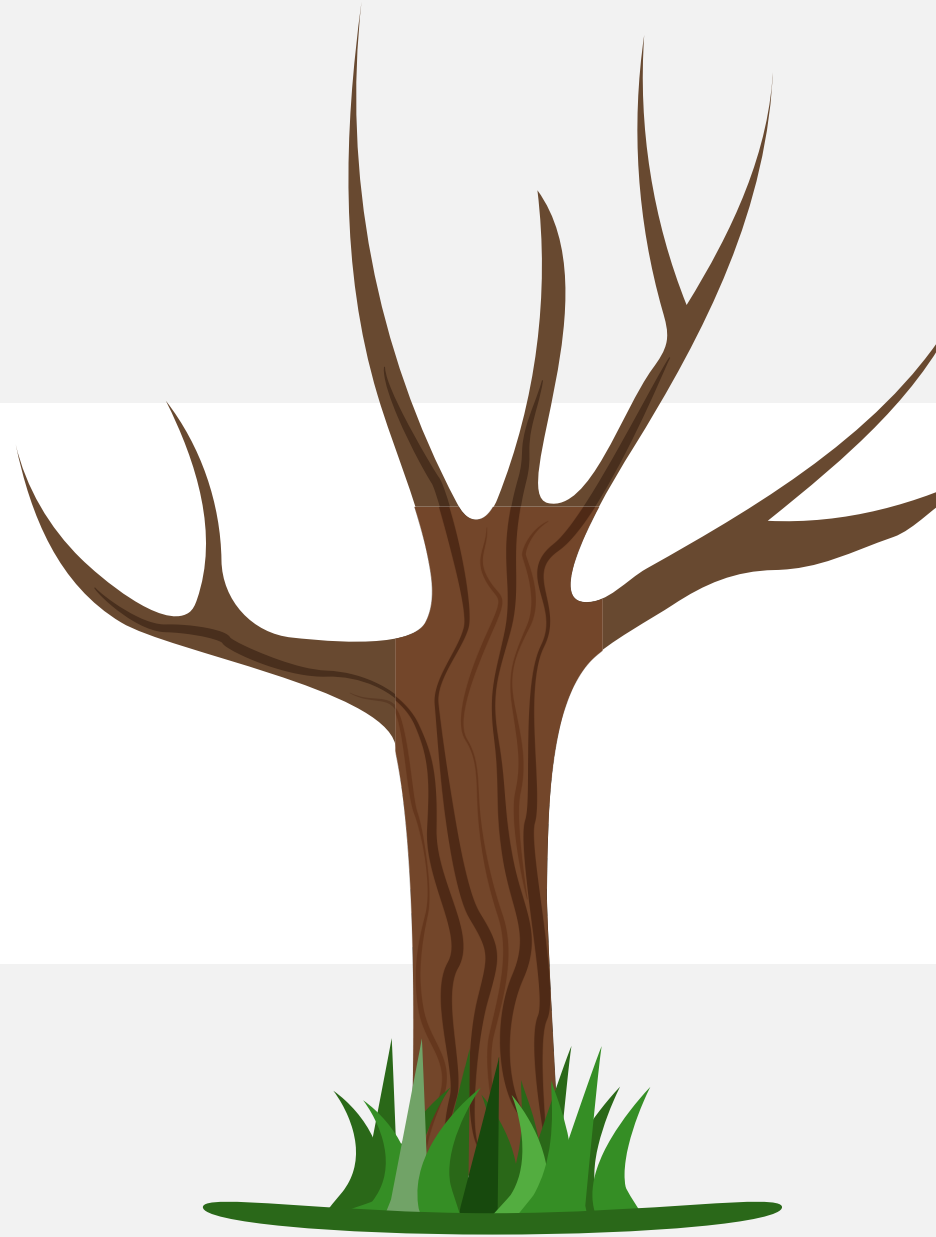
- Offering premium discounts to those who participate in biometric screenings and engaging with their PCP
- Adding Tobacco cessation programs
- Offering onsite health coaching during the workday to set goals and develop an action plan for improved health

## The Why

- Drive participation in biometric screenings and primary care physician exam

# Culture of Wellness

*Breakout Session*



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# Culture of Wellness

*Breakout Session*

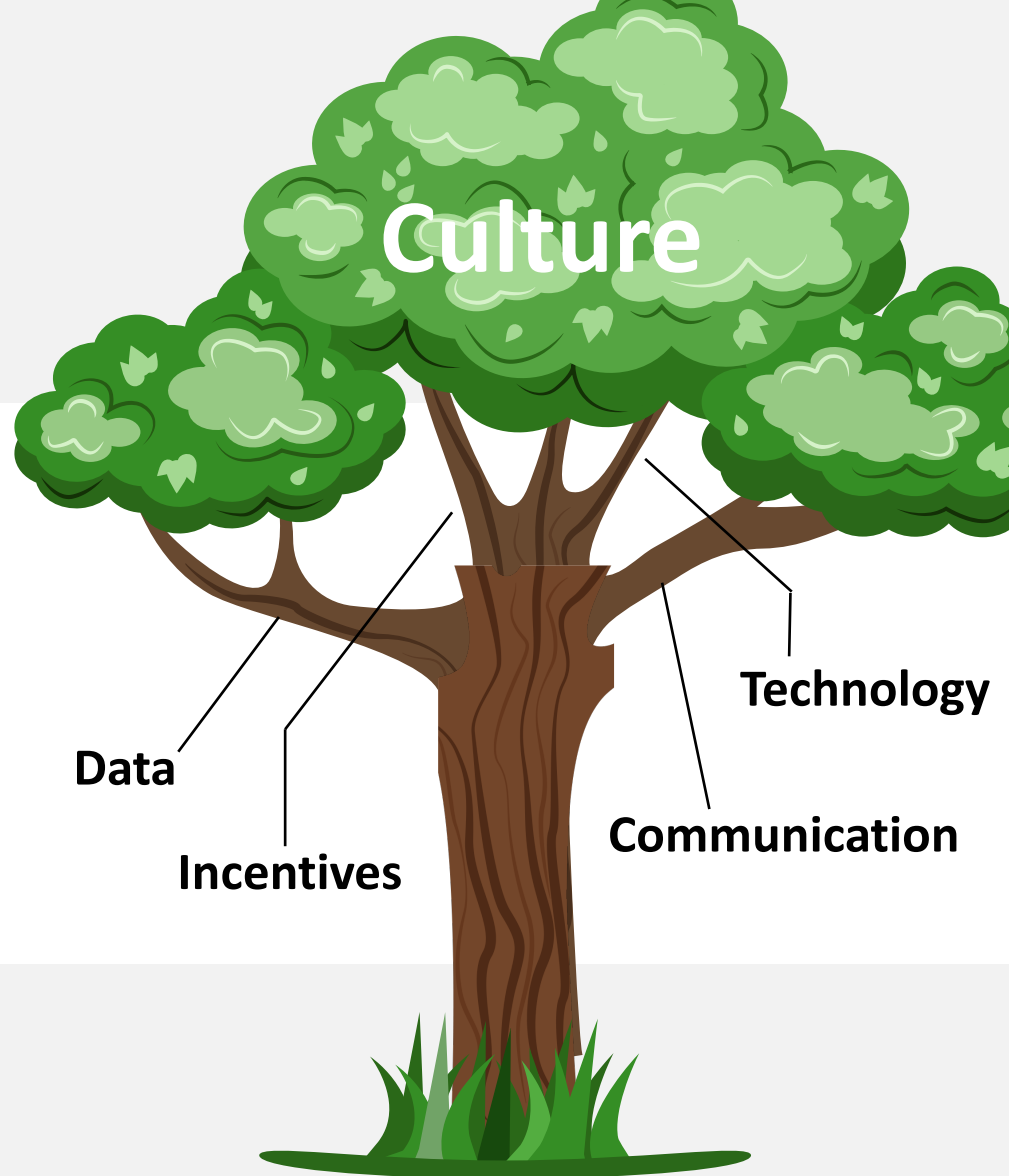
**1** *How do you DEFINE culture in your organization and MEASURE success?*

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**2** *How does WELLNESS factor into your culture?*

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# Branches of Wellness



# Culture of Wellness

*Beyond Biometrics*



WELLNESS HAS MOVED FAR  
BEYOND PHYSICAL



STRESSORS DIVERT ATTENTION  
FROM HEALTH



ONE SIZE COMMUNICATION  
DOES NOT FIT ALL



A DIVERSE POPULATION  
MEANS DIVERSE APPROACHES

# Culture of Wellness

*Beyond Biometrics*

## IN PRINCIPLE

### **Leadership Buy-In**

*A health culture helps achieve critical business objectives*

### **Challenges in Creating A Culture of Wellness**

*Those employers that adopt wellness as part of their business values experience the most ROI*

## IN PRACTICE

### **HealthWorks Story**

*Rediscovering the Importance of Wellness & Culture*

### **Refocused Efforts**

*Ownership of roles, responsibilities & KPOs*

*Performance Bonus Program*

*Better Communication*

*Leadership Priority*

# The Wellness Branches

## Case Study



### The Challenge

- 42+ locations throughout Ohio with unique audiences
- Provide stability and cost containment in employee benefits
- Work with partners that make up a team of service providers
- Create engaging wellness program

### The Solutions

1. Use Data to drive, measure, and plan
2. Incorporate custom incentives by location
3. Create a multi-level, comprehensive communication plan
4. Increase reach through Technology improvements & partnerships

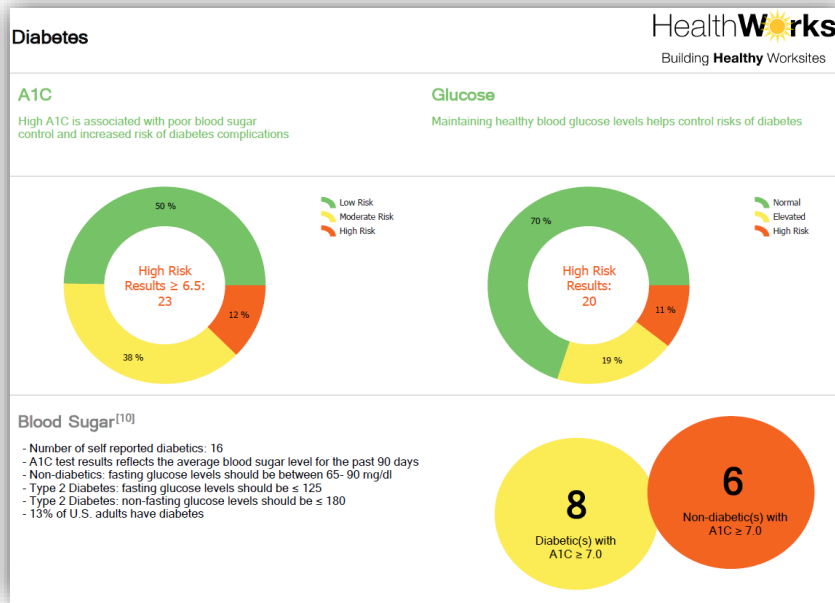
### The Results

1. Portal, coaching, value on investment (VOI)
2. 365% increase in health coaching participation
3. Engaged participants (survey)

# The Wellness Branch of Data Case Study

## The Solutions: Data

1. Importance of Cohort data
2. Marrying claims and biometric data
3. Meaningful aggregate reports





# The Wellness Branch of Data Case Study

## How We Build Your Path to Wellness



### 1 Benchmark

Data-driven strategies have the most impact on employee health improvement. We analyze your existing group health data -- or help create a current benchmark through biometric screenings & assessment results -- as the base of creating your wellness plan.

### 2 Build

Using your health data, key risk areas, and a review of your internal culture, we build a 12-month customized wellness roadmap. Plans keep employees engaged and include a variety of activities to educate about the many dimensions of well-being and key health risks. A dedicated HealthWorks rep drives the program for you and provides meaningful reporting so you have metrics to share with your team. We build the roadmap with you and then take the heavy-lifting from there.

### 3 Brand

We create branded marketing & a comprehensive communications calendar for every component of your plan, including:

- Newsletters & wellness tips
- Email and text reminders
- Custom employee program guide
- More

HealthWorks		Client Roadmap											
		Program Year 2022											
		Your map to comprehensive, turn-key employee engagement focusing on DIABETES, MENTAL HEALTH, and PREVENTION.											
Activity	January	February	March	April	May	June	July	August	September	October	November	December	
Onsite Screenings	Onsite	Offsite Deadline	Aggregate Report									Screening Campaign Kickoff!	
Newsletter & Webinars	X	X	X	X	X	X	X	X	X	X	X	X	
Activity Tracker	X	X	X	X	X	X	X	X	X	X	X	X	
Presentations			Healthy on the Go			Nutrition & Exercise as We Age			Stress #1			Managing Holiday Stress	
Challenges: 1/Quarter	Happiness			Nutrition Challenge			Step Into Summer			Stress Less			
Year 2 Recommendations													
Health Coaching	X	X	X	X	X	X	X	X	X	X	X	X	

# The Wellness Branch of Incentives Case Study

## The Solutions: custom incentives by location

1. Base requirements across the board
2. Custom requirements at the local level – local champions know their audiences and select activities and what is required vs encouraged

**Activity Results for EEVIE CAT**

Welcome to the 2021-2022 CBO Wellness Program. All activities completed count from August 14, 2021, to August 12, 2022, with the exception of the annual screening/bloodwork and routine checkup/physical in section 1, which count from August 13, 2021, to August 31, 2022.

For questions please email HealthWorks at [CBOWellness@cityhealthworks.com](mailto:CBOWellness@cityhealthworks.com)

SECTION 1: CORE ACTIVITIES			
Employees & spouses are required to complete all 3 activities in this section to be incentive eligible.			
CORE ACTIVITY	COMPLETION INFORMATION	MARKED IF COMPLETE	REPORTED BY
Annual Screening or Bloodwork	Complete between 8/13/2021 and 8/31/2022 by making an onsite appointment, using the lab option, or going to your doctor. Credit provided upon completion.		HealthWorks
Health Risk Assessment	Complete the Health Risk Assessment, available online via the HealthWorks' portal. Credit provided upon completion.	✓	HealthWorks
Annual Routine Check-up or Physical	Complete an annual routine check-up with your doctor between 8/13/2021 and 8/31/2022. Self-report.		Self Report
<b>Total Completed Activities: 1</b>			
SECTION 2: LIFESTYLE HABITS			
Employees & spouses are required to complete a minimum of 2 activities in this section to be incentive eligible.			
CORE ACTIVITY	COMPLETION INFORMATION	MARKED IF COMPLETE	REPORTED BY
Preventive Care	Complete any of the approved <a href="#">screening/ exams</a> .		Self Report
Personal Health Score	A Personal Health Score (PHS) is populated following a screening. Review this information under 'My Wellness' on the home page.		Self Report
Challenge	Participate in at least one (of four) Wellable challenges (via portal, online). Credit provided upon completion. <a href="#">Click here for details</a> .		HealthWorks
Health Coaching	Talk to a HealthWorks Health Coach (min 3 sessions). Credit provided upon completion.		HealthWorks
Lifestyle Management	Participate in a <a href="#">program</a> designed to improve any aspect(s) of health.		Self Report
Movement	Workout on your own (min 4 days a week for a month).	✓	Self Report
Workshop	Complete a HealthWorks workshop (via portal, online) and pass quiz. Credit provided upon completion. <a href="#">Click here for details</a> .		HealthWorks
Sports	Participate in any sports league or activity.	✓	Self Report
<b>Total Completed Activities: 2</b>			
SECTION 3: LOCAL/COMMUNITY			
Participation in this section is optional and encouraged.			
CORE ACTIVITY	COMPLETION INFORMATION	MARKED IF COMPLETE	REPORTED BY
ACTIVITY ONE	Participate in any wellness activity offered/promoted by your county employer for credit toward this section.		Self Report
ACTIVITY TWO	Participate in any wellness activity offered/promoted by your county employer for credit toward this section.	✓	Self Report

# The Wellness Branch of Communication Case Study

**The Solutions:** Multi-level, comprehensive communication plan

1. Leadership commitment and involvement
2. Partnerships Monthly e-newsletters & wellness tips
3. Monthly local champion emails
4. Home mailings (especially important for spouses)
5. Boots on the Ground: Health Coach In-Person World Tour

**Wellbites**  
BITE-SIZE WELLNESS TIPS

**Social Health** is linked to an individual's overall well-being. It determines the ability to form and maintain interpersonal relationships.

**Ways to Improve your Social Health** ●●●●●

- Meet people
- Be approachable
- Nurture your relationships
- Try new things
- Stop judging or blaming

**COME MEET A HEALTH COACH!**

**STOP BY THE HEALTH COACHING TABLE DURING THE BIOMETRIC SCREENINGS ON:**

**OCTOBER 19**  
7:00am - Noon (Conference Room)

Learn how a health coach can help you reach your wellness goals.

- Get entered into a drawing for a \$25 Amazon Gift Card
- Try your hand at our Wellness Wheel game or make your first health coaching appointment & get entered into the drawing!
- Get suggestions for setting goals in any of the 8 dimensions of well-being:  
Physical, Emotional, Spiritual, Intellectual, Environmental, Occupational, Financial & Social

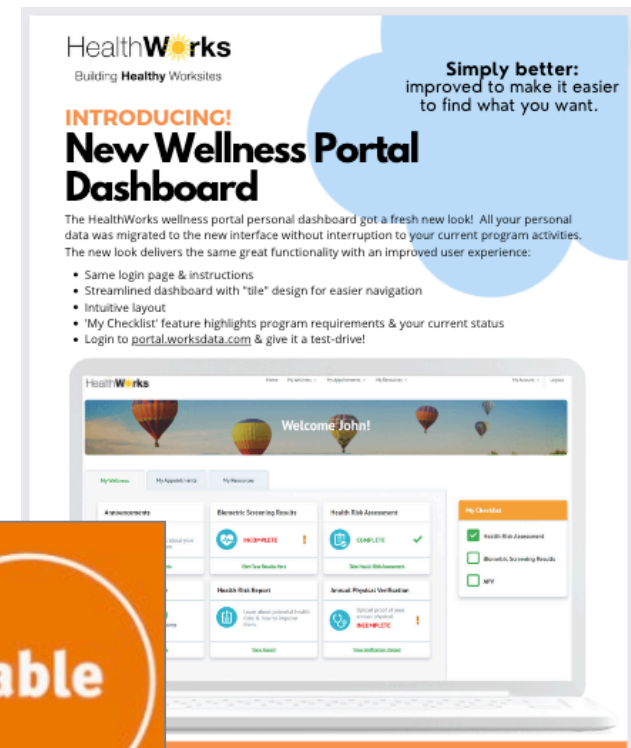
**HealthWorks**  
Building Healthy Worksites

# The Wellness Branch of Technology Case Study

**The Solutions:** Technology improvements & partnerships to increase reach

1. Anthem Sydney App SSO integration
2. Wellable App – syncs fitness information
3. Portal improvements based on survey feedback

Anthem  
BusinessSolver  
HealthWorks  
Delta Dental  
Vision Service Plan  
ComPsych  
Anthem Life





# *The Wellness Branches Case Study Results*

## **The Results:**

1. Portal, coaching, value on investment (VOI)
2. Health Coaching World Tour resulted in 365% increase in coaching appointments
3. Participant survey results (981 responses):
  - 77% felt well-informed about the program
  - 61% said the program helped start or maintain positive lifestyle habits
  - Motivation: 85.2% felt incentives were Extremely/Very Important
  - Portal Experience: 69.7% strongly agreed/agreed portal content was useful & appropriate
  - Program Activities:
    - ✓ Annual Physical is valuable to my overall health (79.8% Strongly Agree/Agree)
    - ✓ Biometric Screening is valuable to my overall health (79.4% Strongly Agree/Agree)









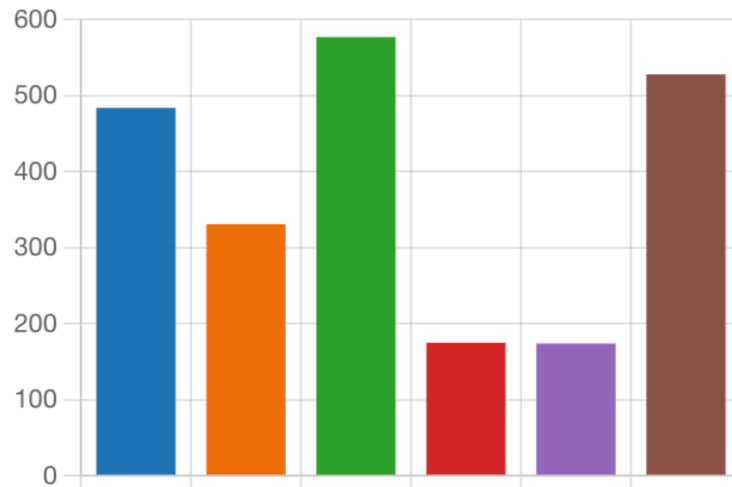
# *The Wellness Branches*

## *Case Study Results*

**The Results:** Daily Habits, Mental & Emotional Well-Being, Work/Life Balance, Financial Well-Being

What areas of wellbeing would you like to see a more in-depth focus on in the future?

	Mental & Emotional Wellbeing	484
	Financial Wellbeing	331
	Daily Habits (Nutrition, Moveme...	577
	Community/Volunteering	175
	Environmental Activities	174
	Work/Life Balance	528



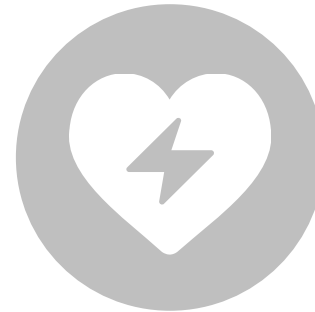
# Innovation for the Future



**MENTAL HEALTH**



EVOLUTION OF  
PRIMARY CARE



CHRONIC  
CONDITION  
MANAGEMENT

# Roadmap to Mental Well Being: Inform, Inspire, Implement

## INFORM



Respond to employee requests for behavioral and mental health services.

## INSPIRE



Partner with agencies to develop an early-intervention strategy and connect employees to appropriate care.

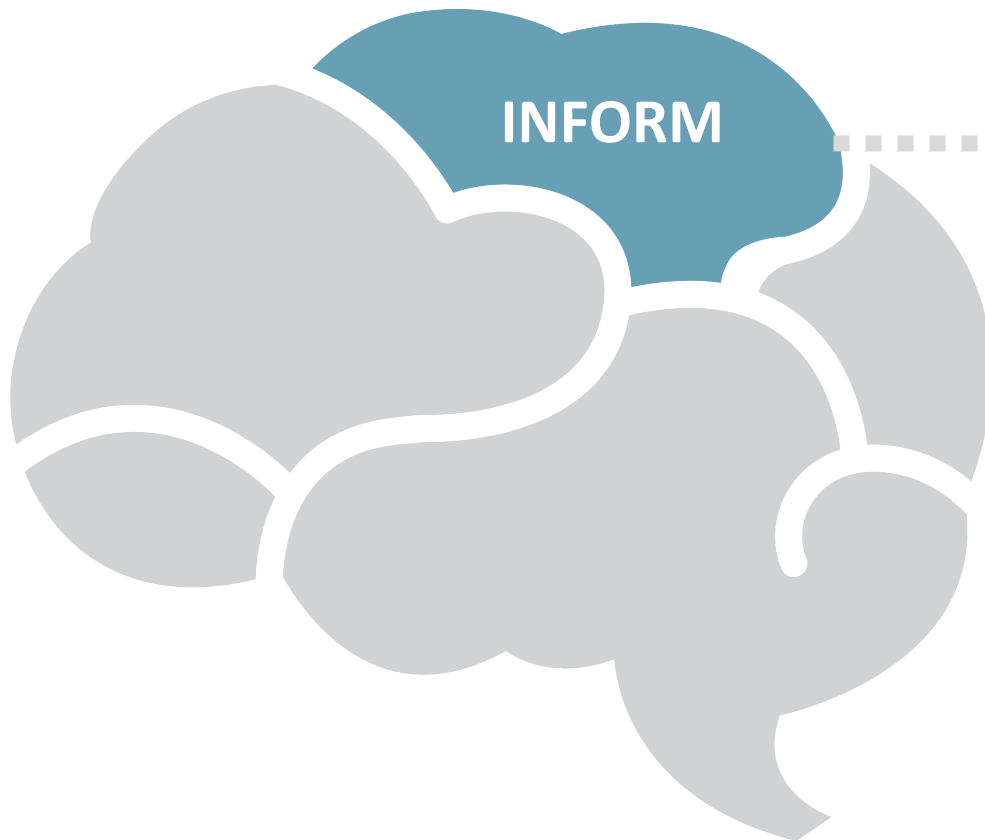
## IMPLEMENT



Develop comprehensive mental health strategy and policies that support a healthy workplace culture.



# Inform: Proactive Response to Resources



## Action Steps

Curate mental health resources and offerings available through your medical and pharmacy plan, Employee Assistance Program and local community agencies.

Promote mental health services via your corporate communications.

# Inspire: Active Response via Employee Training & Education



## Action Steps

Develop a proactive early-intervention strategy that includes employee education and training.

Communicate this to employees as part of a formal engagement plan.

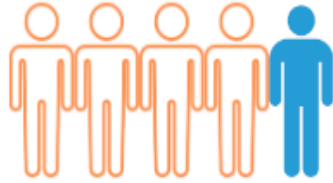
# Implement: Workplace Culture, Policies & Comprehensive Solutions



## Action Steps

Partner with mental health and wellness platforms to create a robust suite of services that provide holistic mental health and wellbeing offerings to employees, spouses and dependents.

# Innovation for the Future: *Mental Well-Being*



**1 in 5 Adults** in the workplace experience a mental illness in any given year. Employees now expect companies to support workers' emotional wellness. Make mental well-being a meaningful part of your wellness program in three easy steps:

## 1. Assess

We offer a confidential [mental wellness assessment](#) that identifies risk factors or warning signs of mental health issues or substance abuse. After getting their results, employees can request additional information or get directly connected with any mental health resources they need.

## 2. Educate

Keep the conversation about mental well-being going by selecting from our menu of [educational presentations](#) about stress, mindfulness, and resilience. Delivered by experienced wellness professionals.

## 3. Act

Engage employees while they learn about good mental health habits with a number of our [digital challenges](#) that sync with the most popular fitness devices.

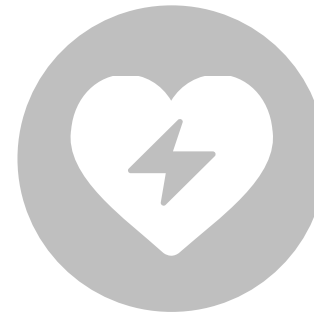
# Innovation for the Future



MENTAL HEALTH



EVOLUTION OF  
PRIMARY CARE



CHRONIC  
CONDITION  
MANAGEMENT

# The Importance of Primary Care

**Primary Care visits prove to be the true foundation of wellness.**



WHAT IS THE ANNUAL CLAIMS TREND DIFFERENCE?

With Annual PCP Visit

7.4%

Without Annual PCP Visit

11.5%



# Evolution of Primary Care

Direct Primary Care



Concierge Medicine



Membership Model



# Dedicated Primary Care through a Membership Model

Provides employees with ease of access, ease of use and comprehensive care while promoting the importance of primary care to achieve better health outcomes.



Creating accessibility and convenience to primary care solutions for employees through **on-site or near-site clinic options.**



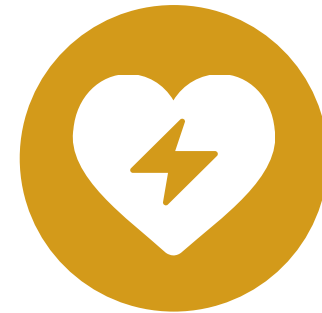
# Innovation for the Future



MENTAL HEALTH



EVOLUTION OF  
PRIMARY CARE



CHRONIC  
CONDITION  
MANAGEMENT

# Digital Therapeutics are Trending

Digital therapeutics are changing the way employees receive care by providing virtual first, tech-supported solutions for chronic condition management.

- Access to health professional
- Built in data-driven insights
- Connected devices



## Home Health Monitoring

### Additional Benefits:

- Less Burden on health care professionals
- Convenience – No wait time

# Creating A Win-Win For Employers & Employees

## EMPLOYER

ROI Performance Guarantees  
Turn-Key Program Roll Out  
Greater Access of Care  
Clinical Improvements in Year 1  
Value-Add Benefit to Employees

## EMPLOYEE

Increased Patient Empowerment  
High Touch Personalized Coaching  
Timely Intervention for Clinical Monitoring  
Incentives for Engagement



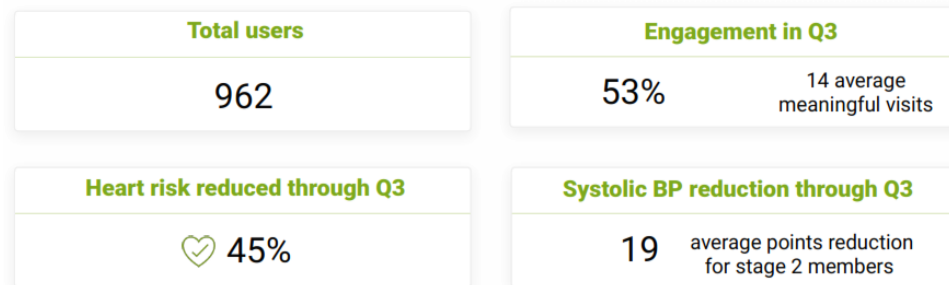
# HELLO HEART

## Case Study

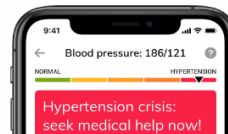
### The Outcomes:

- **Increased user participation to 962 total users**
- Heart risk reduced through Q3: **45%**
- Engagement in Q3: **53%** - **14 average meaningful visits**
- Systolic BP reduction through Q3: **19 average points reduction for stage 2 members**
- **30 members had hypertensive crisis level reading in Q3 and then returned to controlled range**

### Program results dashboard



### Hypertensive crisis caught in time



**30 members**

had hypertensive crisis level reading in Q3 2021 and then returned to controlled range.

# Roadmap for Managing Diabetes



## 11% of the US Population Has Diabetes

In the workplace, a high-risk diabetes case can cost an employer nearly \$10,000 per employee in claims. While each employee manages their own diabetes, smart employers know there's a strong business case for helping employees with diabetes stay healthier. Make diabetes prevention and maintenance a meaningful part of your wellness program in three easy steps:

### 1. Assess



Our biometric screenings include both glucose and A1-C as a good benchmark on the health of your employees. Our aggregate report will provide a snapshot of the gaps in care and how compliant your diabetics are.

### 2. Educate

- Keep the conversation about diabetes and maintaining a healthy lifestyle by selecting our Diabetes Education Series (3 presentations)
- Select one of our 4 health coaching options; from results reviews to targeted coaching, we can help select the approach that is best for your group

### 3. Act

- Engage employees while they learn about good health habits with a number of our [digital challenges](#) that sync with the most popular fitness devices
- Incentivize free testing supply programs



# Key Points



## **FOUNDATIONS OF HEALTH MANAGEMENT**

*Keep it simple yet effective*



## **CULTURE OF WELLNESS**

*Leadership, Action Plan & Accountability*

# Questions



**Schedule a discovery session with Health Management Director.**

**RAKEL KEANE**  
Health Management Director  
HORAN



**Reach out to HealthWorks for initial consultation and program capabilities.**

**DENISE FLICKNER**  
Founder & CEO  
HealthWorks



## Biographical Information

**Rakel Y. Keane, Health Management Director, HORAN  
Corporate Headquarters  
8044 Montgomery Road, Suite 640, Cincinnati, Ohio 45236  
513-745-2167 rakels@horanassoc.com**

Rakel Keane has over 15 years' experience working directly with clients to design and implement customized wellness solutions that drive engagement and optimize employee health. The HORAN Health Management Way™ provides employers with a results-oriented strategic approach to help them execute and achieve measurable outcomes related to employee health and cost containment. Rakel helps clients navigate program design and implementation, vendor selection, benchmarking and evaluation and provides recommendations based on business needs and desired outcomes.

For over 70 years, HORAN has served as a trusted advisor providing legendary service, support, and partnership in employee benefits consulting, wealth management, and life insurance for estate and business planning.

At HORAN Health, we help you catalyze a brighter future and achieve more positive outcomes for your employees. As an industry thought leader, we explore new horizons in health care, employee benefits, engagement, compliance, and wellness. Over nine out of ten customers recommend us to handle their second largest expense item.

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**Denise S. Flickner, Founder & CEO, HealthWorks  
4329 B Red Bank Rd., Cincinnati, OH 45227  
513-751-1288 denise@cincyhealthworks.com**

Denise Flickner, launched HealthWorks, a corporate health & well-being business in 1999. She earned a Bachelor of Science degree in Dietetics in 1987 from the University of Cincinnati, is a former certified personal trainer, and taught group fitness from 1987-2012. She intuitively understood the importance of living a healthy lifestyle and had just the right combination science, passion, and energy to help make a real difference in other peoples' health journey.

HealthWorks is an independent, woman-owned company, corporately located in Cincinnati, OH, with a solid footprint throughout the state of Ohio as well as servicing some national clients. For over two decades, it has partnered with companies in all industries and all sizes, from groups as small as 25 employees to companies with over 17,000. They help companies design overall wellness roadmaps, providing real solutions that suit each organization's specific culture.