



CASE STUDY: ELEVATING BENEFITS COMMUNICATION FOR FINANCIAL INDUSTRY FIELD AGENTS



Our client is a highly respected financial industry leader, committed to meeting the benefit needs of their field agents with the highest standards. Their success depends on retaining top talent, and they recognize that comprehensive benefits play a key role in achieving this. Their financial representatives build lifelong relationships with clients, helping them develop and execute financial security plans. To uphold their commitment to exceptional service, they partnered with **Bree Health's** Health Advocacy Services.

CHALLENGES

The company faced several key challenges in supporting their field agents:

- **Time Constraints:** Agents needed to stay focused on their clients and couldn't afford to spend time navigating claims and benefits questions.
- **Increased Need for Education:** A redesigned benefits package required enhanced advocacy and re-education efforts.
- **Limited Employee Data:** A lack of comprehensive demographic insights made it difficult to tailor benefits support effectively.
- **Communication Barriers:** Reaching a widely dispersed workforce with clear benefits information was a challenge.
- **Field Support:** Stronger benefits assistance was needed to ensure field representatives had the support to stay focused on their core responsibilities.

SOLUTIONS

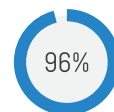
To address these challenges, the company implemented **Bree Health's** services:

- **Comprehensive Health Advocacy:** Delivered clear, detailed guidance on health plans and benefits, empowering employees to make informed decisions.
- **Personalized Support:** Health Advocates provided immediate assistance, resolving most issues on the first call and minimizing time spent on benefits-related tasks.
- **Proactive Education:** Increased employee understanding of health plans, reducing confusion and lowering healthcare costs.
- **Claims Assistance:** Helped employees manage healthcare claims and coordinate appeals, simplifying the complexities of the healthcare system.
- **Continuous Engagement:** Maintained ongoing communication and follow-ups, driving higher utilization and overall satisfaction.

CONCLUSION

Through the tailored and comprehensive services provided by **Bree Health's** Health Advocacy Services, the financial company successfully addressed the critical challenges faced by their field agents. The program's holistic approach and 24/7 accessibility have significantly improved employee well-being, productivity, and overall satisfaction. This partnership underscores the value of strong support systems in enhancing performance and fostering a healthy, motivated workforce.

RESULTS



increase in health advocacy requests and a **28%** increase in overall utilization of the benefits.



Employees avoided spending **\$500,000** in healthcare dollars, showcasing the financial benefits of the program.



Employees demonstrated a better understanding of all employer-sponsored benefits, leading to **higher satisfaction and retention.**



Our Health Advocacy Services will work with you to fully customize a health advocacy program that will drive the most change for your employees.

Bree Health's comprehensive Health Advocacy Services help employees maximize their healthcare benefits while freeing up valuable time for HR teams. Our dedicated Health Advocates assist with claims and appeals management, billing support, prescription guidance, and provider research. We simplify the complexities of medical, dental, and vision plans by offering clear explanations, benefit coverage verification, and support for HSA/FSA inquiries. By ensuring employees make the most of their benefits, we enhance productivity, reduce HR workload, and improve overall satisfaction—leading to a more engaged and supported workforce.

BENEFIT INFORMATION AND SUPPORT

Health Advocacy can assist with special services such as:

- Claims Assistance
- Benefit Coverage Verification
- ID Cards
- Prescription Drug Coverage Questions
- Appeals
- HSA/FSA Questions
- Health Benefit Education
- Provider Research

HEALTH ADVOCACY IS DESIGNED TO:

- Create more efficient utilization of employee benefits.
- Save HR professionals time by answering benefit questions.
- Boost employee productivity by acting as a liaison with billing or authorization issues.

WHY HEALTH ADVOCACY?

For many employees, the complexity and fine print of benefit packages can be overwhelming. Studies show that dissatisfaction often stems not from the coverage itself, but from a lack of understanding of how to use available benefits effectively.

This confusion leads to frustration and questions that frequently land on HR's desk.

Bree Health's Health Advocates serve as expert guides, translating benefit details and advocating for employees—saving time, money, and stress for everyone involved.

By navigating the complexities of medical, dental, and vision plans, Health Advocates provide clear direction, helping both employees and employers maximize their benefits.

THE VALUE TO YOU:

- **Claims Assistance:** Clarify out-of-pocket expenses, offer plan and eligibility guidance, and coordinate benefits for seamless access to care.
- **Benefits Information:** Answer questions about out-of-network providers, explain coverage details, and provide clarity on health benefits.
- **Prescription Support:** Offer insights on prescription costs, cost-saving options, FDA recalls, withdrawals, and available discounts.
- **Appeals Assistance:** Guide employees through claims grievances, helping with documentation and the appeals process.
- **Provider Research:** Assist in finding in-network providers that align with employees' health plans for optimal care access.