



From Insight to Impact: How Advisors Are Proving Value Year-Round

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Self-Funded Plans Are Under Pressure. So Are You.

86% of employers say they're looking to their benefits advisor for strategic, data-driven guidance—not just plan design support. (Source: Business Group on Health, 2024)

But with fragmented vendors, delayed data, and inconsistent benchmarks, delivering that insight isn't easy. To lead with confidence, advisors need more than a strategy—they need **clarity, control, and timely insight they can act on.**

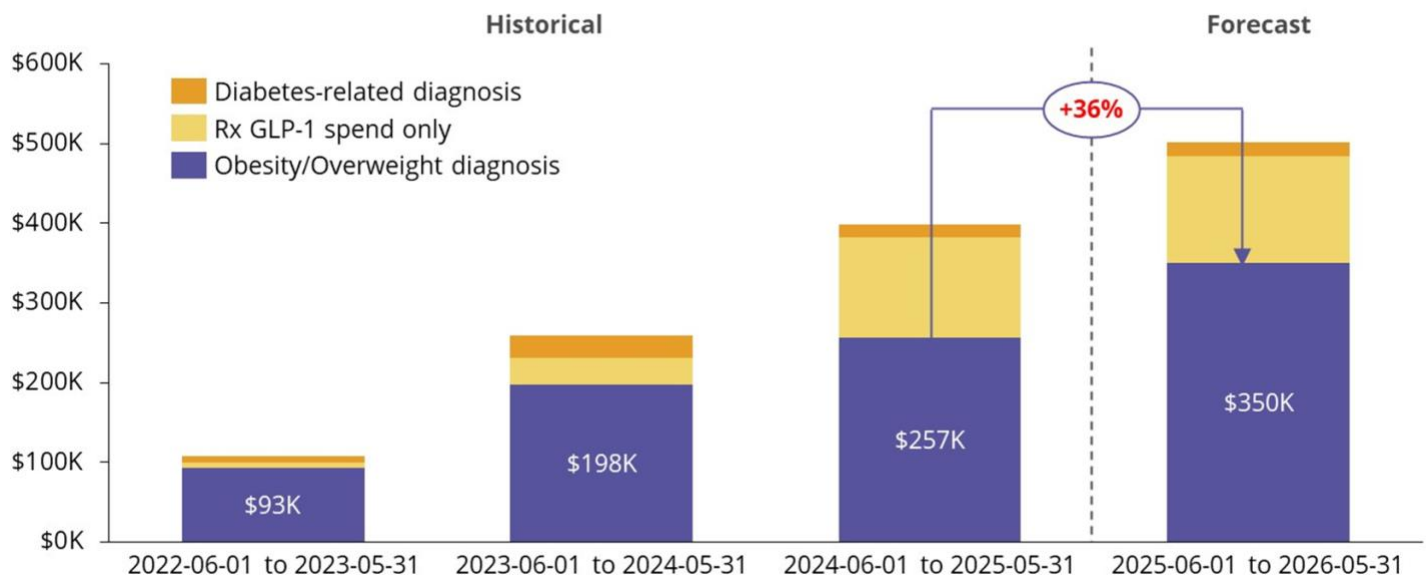
GLP-1 Utilization: A \$350K Moment of Clarity

In a recent plan review, one advisor discovered GLP-1 drugs accounted for 4 of the client's top 5 prescriptions, driven largely by non-diabetes use. Projected annual spend for weight-loss: \$350,000.

With diagnostic segmentation and pattern analysis, the advisor identified off-label prescribing trends and guided the client toward a more sustainable strategy: excluding GLP-1s for weight loss in the upcoming renewal.

This wasn't just cost control; it was a proactive, data-backed decision rooted in fiduciary responsibility and clinical insight.

GLP-1 Utilization by Diagnosis Group



How Advisors Are Driving Broader Impact

The value isn't limited to GLP-1s. The most effective advisors are delivering impact across the board:

- **Invoice Oversight**
Spotting billing errors, stop-loss issues, and admin overcharges *before* they hit the plan.
- **Vendor Accountability**
Using cross-client benchmarks to call out underused or underperforming point solutions.
- **Care Navigation Gaps**
Highlighting areas where lack of engagement leads to avoidable risk and rising cost.
- **Validated ROI**
Tracking performance actively to prove impact and adjust quickly—no more waiting for year-end data.

The Bottom Line: Insight Is Your Differentiator

It's not about having more data. It's about having the right insight at the right time to help clients act confidently. Advisors who do that are proving their value between renewals—not just at them. And in today's market, that's what earns loyalty, expands relationships, and wins new business.

Have questions? Reach out to us at insights@wellnecity.com

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