



Broker Wellness ROI Toolkit

Helping Clients Build Successful Wellness Programs

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Why Wellness ROI Matters More than Ever

Wellness programs are no longer optional; they're essential tools for [attracting talent](#), [reducing costs](#), and [fostering engagement](#). As a broker, your expertise can transform wellness programs into strategic assets that deliver measurable ROI and showcase your unique value.

From healthcare savings to improved retention and productivity, wellness initiatives address key business priorities. For every dollar invested, organizations see a [return of \\$3.27](#), underscoring the financial and cultural impact of these programs.

Beyond financial returns, wellness programs enhance employee satisfaction, reduce turnover, and create a healthier, more productive workplace. This makes them a vital element in aligning organizational goals with workforce well-being.

This e-book offers high-level strategies and resources to help you present [ROI-driven wellness solutions](#) to your clients.

What is Return on Investment and Why Does it Matter?

[Return on Investment \(ROI\)](#) is a critical metric that evaluates the financial return an organization gains relative to its investment. In wellness programs, ROI reflects how effectively these initiatives contribute to an organization's bottom line.

For brokers, understanding ROI is key to:

- Building Client Confidence
- Strengthening Recommendations
- Delivering Measurable Results



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Why IncentFit



Breaking Down ROI

Wellness programs deliver measurable value across three critical areas, giving organizations more than just cost savings:

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Healthcare Savings
Preventive care and targeted wellness initiatives reduce claims, sick days, and overall healthcare costs.
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Employee Productivity
Wellness initiatives promote healthier habits, improving productivity and reducing absenteeism.
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Recruitment and Retention
Comprehensive wellness programs enhance job satisfaction and strengthen company culture, making organizations more attractive to top talent. They also reduce turnover by showing employees their well-being is a priority.

By addressing these areas, wellness programs not only foster a healthier workforce but also provide substantial economic advantages to organizations.

Helping Clients Overcome Wellness Roadblocks

While the benefits of wellness programs are clear, brokers often encounter client hesitations that can stall progress. Concerns like unclear **ROI**, limited **budgets**, and lack of **employee engagement** are frequent roadblocks.

Problem: Unclear ROI Metrics Solution: Define Clear Goals and set measurable objectives, such as reducing turnover or boosting engagement.	Problem: Limited Budget Solution: Focus on scalable, short-term solutions alongside long-term lifestyle benefits.	Problem: Low Engagement Solution: Leverage health assessments and surveys to track engagement and outcomes.
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Overcoming challenges is only part of the equation, true success comes from designing wellness programs that align with each client’s unique goals, workforce dynamics, and budget.



Creating Tailored Strategies for Client Success

A one-size-fits-all approach rarely delivers results in wellness programs. Every organization has unique needs, and brokers play a critical role in crafting solutions that align with their clients' goals, workforce dynamics, and budgets.

Check List for Brokers:

- ✓ Survey employee **needs**, assess **demographics**, and **preferences**.
- ✓ Evaluate **budgets** and identify **potential savings** opportunities.
- ✓ Define **pain points** like absenteeism or healthcare cost overruns.
- ✓ Set **measurable goals**, such as reducing absenteeism by 10%.
- ✓ Identify **high-impact activities**, such as gym memberships or health screenings.



Tools for Tracking Wellness Impact

Demonstrating ROI requires **reliable data** to prove the value of wellness programs. Brokers can build trust by helping clients track both qualitative and quantitative results.

Metric	What to Track	How to Track
Health Assessments and Biometrics	Changes in health metrics like BMI, blood pressure, or cholesterol over time.	Use pre- and post-program results to evaluate health improvements.
Absenteeism and Productivity	Reductions in sick days, medical leave, and productivity changes.	Monitor absenteeism, and analyze productivity metrics, such as project completion.
Engagement Rates	Participation in challenges, and completion rates for wellness activities.	Send pulse surveys to assess program satisfaction and monitor activity rates.



Why Tracking Metrics Matters

Measuring outcomes ensures **program effectiveness** and provides **data-driven insights** to improve future initiatives. By tracking these metrics, brokers can:

- Highlight tangible results, such as cost savings or reduced absenteeism, to build client confidence.
- Identify areas for program improvement or expansion, ensuring long-term success.
- Reinforce their role as trusted advisors, demonstrating expertise in ROI measurement.

Example:

Companies using IncentFit report a reduction in absenteeism and an average 60% user participation rate, 2.5x higher than traditional programs.



How to Maximize ROI: 8 Recommendations

Guiding clients toward wellness programs that deliver measurable results is key to building trust and driving success. Here are practical recommendations to help your clients maximize ROI.

1. Prioritize **incentives** that drive engagement, like gym check-ins or preventive care.
2. Focus **program spending** on rewards, not administrative fees.
3. Recommend **activity-based models** that provide real-time tracking and accountability.
4. Assign a **dollar value to metrics** like productivity and absenteeism to calculate ROI.
5. Negotiate **wellness dollars** or **discounts** with insurance providers for additional savings.
6. Use **regular surveys** to adapt programs based on employee feedback.
7. Partner with vendors who offer flexible, **scalable solutions**.
8. Keep programs fresh by **revisiting goals** and implementing **new ideas**.



Why IncentFit is the Perfect Partner for Brokers

IncentFit empowers brokers to deliver ROI-driven wellness solutions that enhance their value to clients. Our unique approach ensures measurable results, combining meaningful incentives, cutting-edge technology, and proven engagement strategies.

Incentives That Drive Engagement

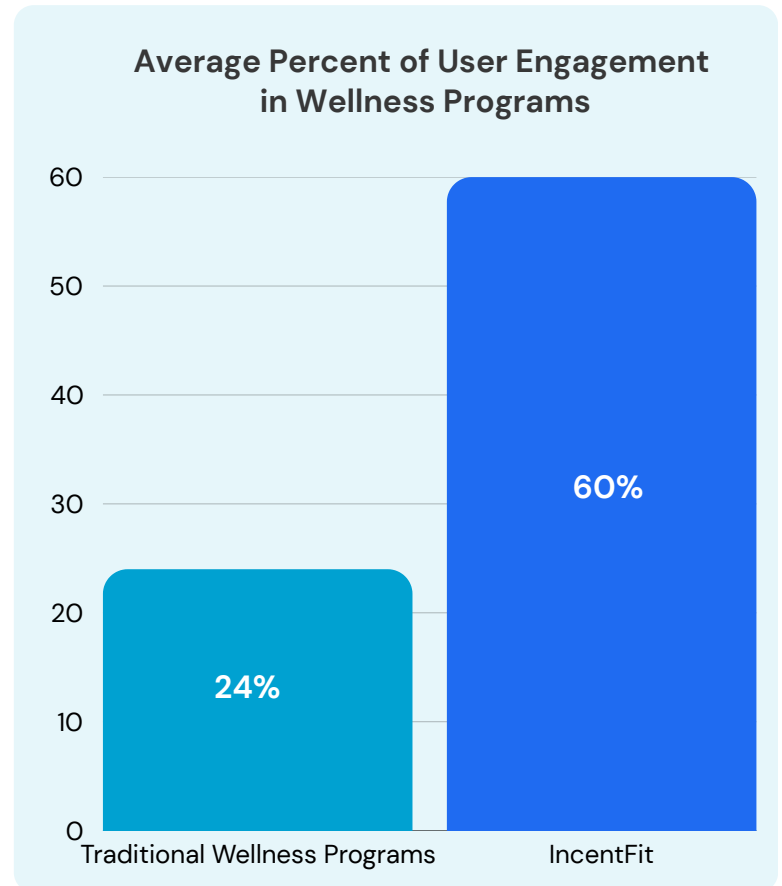
IncentFit places meaningful rewards at the heart of wellness programs, achieving a 60% average engagement rate, 2.5x the industry standard.

Technology That Simplifies and Scales

As a technology company, IncentFit delivers more automation, lower costs, and a user-friendly platform that adapts to unique client needs.

Real Engagement, Real Results

Our focus isn't just on app interaction, it's about inspiring employees to engage in healthy behaviors that make a tangible impact. By leveraging behavioral science, IncentFit ensures employees stay motivated, improving productivity, reducing absenteeism, and creating long-term cultural change.



Partnering for Success

Brokers have a unique opportunity to deliver real value through ROI-driven wellness programs. With IncentFit, you gain access to proven tools, strategies, and support to help your clients achieve measurable success.

Ready to deliver results for your clients? Scan the QR code to [schedule a demo](#) with an IncentFit Benefits Specialist and see how we can help you build ROI-driven wellness solutions.

