

CASE STUDY

Supporting Healthier Members and Higher Cost Containment with Clinical Case Management

How Vālenz Health® Delivered \$2.67M in Savings for Coeur Plan Services, LLC

Executive Summary

As longtime partners, Vālenz Health® and Coeur Plan Services, LLC, share a mutual goal: supporting the delivery of high-quality care that improves member health outcomes while reducing costs for all involved.

This case study demonstrates how clinical case management services play a critical role in that mission — and why the unique human approach offered by Valenz creates “lifetime partners” for clients like Coeur.

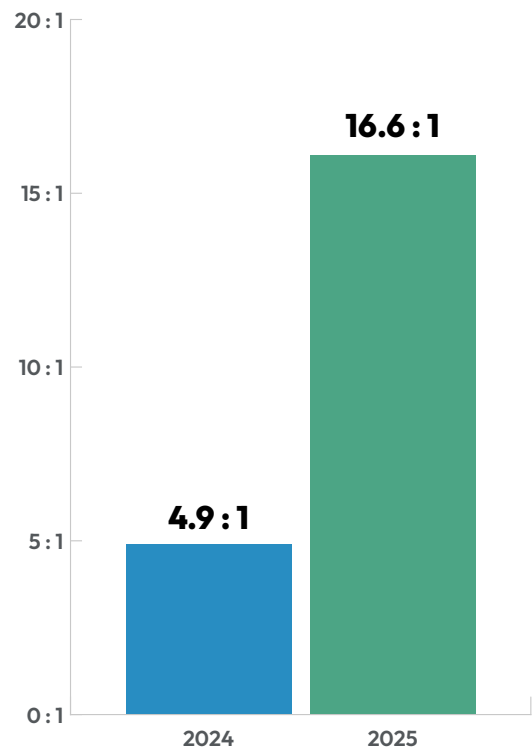
Through proactive Case Management, a feature of the Clinical Engagement solution suite, Valenz transformed care outcomes for members covered by Coeur’s clients to deliver significant cost containment in the 2025 plan year, including \$2.67 million in total plan savings.

“Cost is always going to be one of the top concerns, but improving the lives of the members we serve — we both share that vision as organizations... That’s something I’ve always found with Valenz, and that’s what makes it very easy for me to say that this is a lifetime partner for us.”

Grace Dishaw

President, Coeur Plan Services, LLC

Return on Investment: Case Management



16.6x ROI
+238% YoY

\$2.67M in savings
+258% YoY



Challenge

As a third-party administrator, Coeur helps companies design and administer self-funded employer health plans. Valenz partners with Coeur to support their employer groups, offering tailored strategies via an integrated solution suite.

With a goal of minimizing client costs and protecting member access to high-quality care, Coeur sought care management services that would go above and beyond the industry standard to deliver superior results — without compromising the member experience.

“A lot of other care management approaches that we’ve worked with in the past were very automated or systematic, and navigating a health issue is none of those things,” said Grace Dishaw, President at Coeur. “It’s very necessary to have a person help someone navigate through a disease... It’s not something that we can just simply apply automated tools to — and nor would we ever want to.”



Solution

Valenz offers a wide range of integrated solutions powered by advanced technology and clinical expertise to optimize the cost, quality, and utilization of care for all.

As part of the Valenz Clinical Engagement solution, our Case Management feature goes beyond basic utilization and disease management programs to proactively support members experiencing complex and high-cost care episodes.

First, our proprietary algorithm identifies and prioritizes member cases with the greatest cost, complexity, and utilization risk for proactive outreach. Then, nurse case managers connect directly with those members to help them navigate care, make informed decisions, and access the right support at the right time through ongoing education, coaching, and guidance.

By proactively engaging with patients, the experienced Valenz clinician team delivers personalized member advocacy that encourages smarter healthcare choices not just during active treatment but also over the long term — containing plan costs while supporting ongoing access to high-value care options.

“I think that’s one of the unsung heroes of the Valenz care approach: taking care of that immediate need but then also focusing on the future.”



Grace Dishaw
President, Coeur Plan Services, LLC



MEMBER RESULTS

A member with a serious cancer diagnosis was enrolled in the Valenz Case Management program to support treatment planning and care coordination.

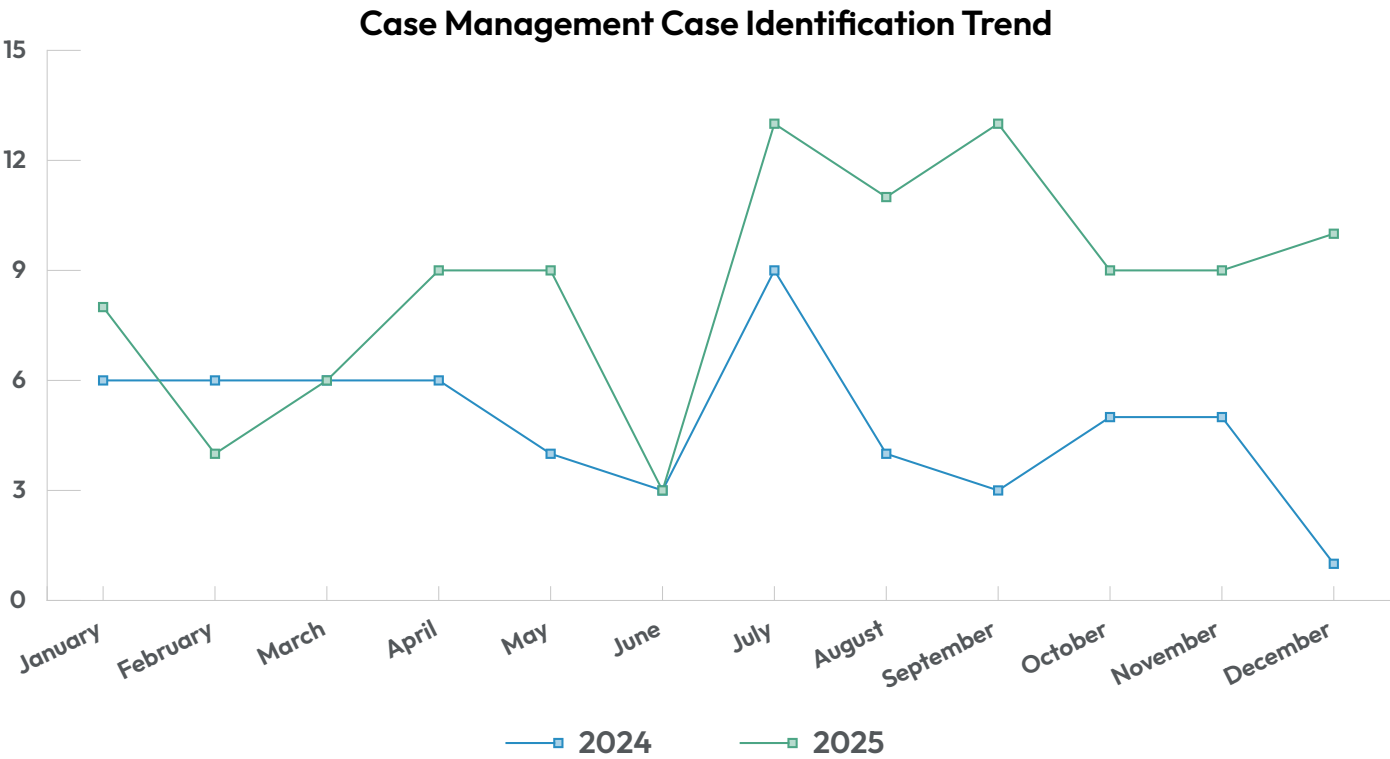
A Valenz nurse case manager provided education regarding treatment expectations, potential side effects, and strategies to support adherence to the member’s care plan. Through ongoing outreach and support, the member remained engaged in treatment while maintaining normal daily activities.

As a result, the member successfully completed treatment and reported a positive experience with the education, guidance, and support provided by the Case Management team.

Results

Leveraging the strong existing relationship with the Coeur team, Valenz deployed Case Management for its clients to great success, achieving a 20% member participation rate in 2025.

A 79% increase in open cases, year over year, demonstrates higher awareness and engagement by plan members, with an above-average 50-day average case duration underscoring personal member investment in their health journeys.



Case Management Participation Rate:

20%

Valenz client average: 17%

Case Management Open Cases Trend:

79%

Valenz client average: 46%

Average Case Duration:

50 Days

Valenz client average: 43 Days

At the same time, a 45% year-over-year increase in case referrals from the plan/payer highlights the deep level of collaboration and trust between Coeur and Valenz — a partnership that makes a huge difference in the program’s success.

“To have a person that we can go to that’s quarterbacking all of our initiatives, that’s huge: to be able to pick up the phone, go to our senior

client executive and say, ‘Can you point me in the right direction for this?’ It just seems so much more effective,” said Dishaw.

In total, Case Management delivered more than **\$2.67 million in savings** for Coeur in 2025 — generating an overall program **ROI of 16.6:1** for the TPA’s client.

High-Quality, Low-Cost Healthcare

Starts with Proactive, Personalized Member Engagement

By proactively engaging with members to support them throughout their complex care journeys, the Case Management program from Valenz delivers measurable clinical and financial value — value that is only multiplied with the help of a committed TPA partner like Coeur.

Over the course of a single plan year, the collaboration between Valenz and Coeur supported significant results for the latter's client, including:



Higher Member Engagement:

A 20% average participation rate and a 79% increase in open cases year over year demonstrate strong member adoption of the program and a willingness to stay personally involved in their healthcare journeys.



Stronger Care Coordination:

A 45% year-over-year increase in case referrals from Coeur highlights the close partnership with Valenz, enabling earlier intervention by the case management team and more effective support for members.



Superior Cost Containment:

By helping members access the right care at the right time, the Case Management program generated more than \$2.67 million in savings for a total ROI of 16.6:1.

As part of the Clinical Engagement suite, the Case Management program helps plans achieve what matters most: a better member experience, better health outcomes, and sustainable cost containment over time.



"For us in the industry, we still rely on people... That's something that's been in the fundamentals of what Valenz care management has always been about: using those types of technologies and services to better serve our members."

Grace Dishaw

President, Coeur Plan Services, LLC

Ready to optimize your healthcare strategy? Contact us today.
(866) 762-4455 | valenzhealth.com | info@valenzhealth.com

