



The A-Z for Wellness Management Software

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June 2018

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Introduction

Employee wellness programs are increasingly vital to corporations in order to attract and retain top talent and ensure employee satisfaction levels remain high. But creating and managing a wellness program can be a full-time job, not to mention the stress involved in satisfying the C-suite's desire to effectively track and evaluate participation, and ROI of these programs.

There are various forms of wellness models: some are delivered by employers providing wellness programs to their employees, and some are wellness providers that are in the business of developing, delivering, and promoting wellness initiatives for employers. In both cases, there is a lot to administer and programs are constantly growing in variety and complexity. This is where wellness technology becomes so vitally important to power programs, allowing you to manage, administer and promote your wellness program like a rock star...

1 The 5 W's of Wellness Technology

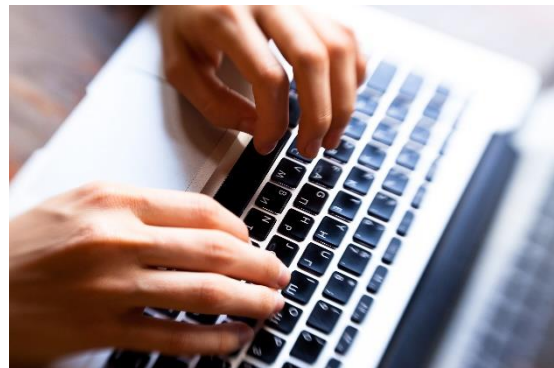
1.1 What is Wellness Technology?

Wellness (or Wellbeing) technology provides organizations with the infrastructure to efficiently identify the health risk levels of employees so organizations can develop and deliver wellness programs to help motivate, engage and incent employees (and their dependents) in a variety of healthy behaviors.

Good technology will also help you evaluate the performance of these programs and measure ROI too.

Wellness technology is a broad term that describes wellness software, tools and systems that may also be referred to as:

- Wellness management system
- Wellness portal
- Wellness software
- Wellness system
- Wellness platform
- Population health management solution
- Health engagement platform
- Employee engagement (oftentimes wellness programs are a component of formal [employee engagement strategies](#))



Or any variation of the above with interchangeable reference to: well-being, workplace wellness, corporate wellness, employee wellness, etc.

One important factor to understand is the difference between a [wellness software application vs a wellness platform](#) as this will help you identify what type of tool you really need to manage your programs for today and in the future.

Be aware that some wellness technology may focus exclusively on specific components or programs (e.g. only health coaching or health assessments or challenges) vs. everything all-in-one.

In addition, vendors with their core business of wellness technology (vs. providing wellness programs AND developing technology) have their *pulse* on the industry and are constantly evolving their platform to incorporate feedback from all customers needs and wants to help 'future proof' your technology AND your business.

1.2 Why Use It?

There are many moving parts to employee wellness programs which can become difficult to manage – not to mention the ability to effectively track and evaluate participation and the results/ROI of these programs.

Whether you are an employer providing wellness programs to your own organization or a wellness provider that develops, delivers and promotes wellness initiatives to employer clients, there is a lot to administer. Programs are growing in variety and complexity and may include (but not limited to) challenges, health assessments and biometrics tracking, coaching programs, educational/health content, financial wellness, activity/device tracking, incentives and beyond!

The more complex your programs, the sooner you'll likely need wellness management software so you aren't spending your day doing administrative tasks and can better use your time on planning and implementing other strategies to improve employee health.

Wellness professionals want to continue to add value to their organizations and earn a reputation for 'getting results'. It's hard to get to that point of being viewed and valued as a strategic advisor if you are in the weeds of administrative chaos. This is one of the main reasons why you use wellness technology to power your programs – to prove you are a rockstar wellness expert NOT an administrative worker-bee!

1.3 Who Uses It?

Typically, the following organizations use wellness technology:

Corporate Wellness Companies

Companies that specialize exclusively in providing corporate wellness programs to employer organizations are very common in the United States. These companies typically tailor and re-brand wellness portals to align with each client's unique needs and act as value-added re-sellers of the technology. Technology is a fundamental part of a wellness company's business as it enables them to do what they do best – offer wellness programs and services to their clients and measure the results of their programs.

Medium to large-sized corporate employers

Some smaller employers do too; however, it all depends on budget and program sophistication. If you are a small employer with <100 employees, you typically don't have an in-house wellness expert dedicated or a multi-faceted wellness offering (e.g. only offers activity challenges or occasional workshops). Smaller employers who need support will typically work with corporate wellness providers who can help to implement an appropriate program. Usually, the larger the employer, the more robust the wellness programs and the more 'moving parts' to manage and administer.

Insurers and their wellness divisions

Insurers are increasingly expanding their services beyond just typical insurance products and are now offering wellness programs to their corporate client's workforces. Employers are looking for ways to reduce employee health concerns and ultimately save on health premiums, so leading insurers are offering wellness programs as a value-add service to customers while gaining a competitive advantage.

Health Coaching Companies

Similar to corporate wellness companies, employee health coaching companies specialize in delivering their health coaching services to employees (and their dependents). Oftentimes, health coaching is conducted online so wellness platforms provide the infrastructure for these coaches to deliver their services. For example, CoreHealth's platform offers video coaching so coaches and employees can 'meet' online and have an engaging and personalized discussion without the expense or inconvenience of leaving the office or home. Plus, many health coaching companies are also expanding their services to include a variety of additional wellness programs and need technology to support them with this.

EAP Providers

[Employee Assistance Program](#) (aka EAP) providers are an invaluable resource to support overall health and well-being. [EAPs provide a variety of programs, services and support](#) (e.g. counselling) to employees and their families to assist them with personal problems and/or work-related problems that may impact their job performance, health, mental and emotional well-being. Since EAP providers offer such a variety of programs, they need a sophisticated technical infrastructure to help them develop and deliver their services.

Group Benefits Brokers

Benefits brokers are often the first-point of contact for employers seeking guidance on overall employee health and wellbeing typically in the form of health insurance and retirement programs. Benefits brokers are trusted advisors whose primary priority is servicing the needs of their clients but in recent years, employer needs have gone well beyond just insurance. Nowadays, many brokers also offer workplace wellness programs and depend on wellness management software to power them.

For brokers who are not yet offering corporate wellness services, but are considering doing so, this [Worksite Wellness 101 Wellness Guide for Benefits Brokers](#) blog provides helpful insight. Learn how your brokerage firm can guide and support clients with effective corporate wellness programs. Gain a competitive advantage, share the value of wellness, and decide how you can best help clients achieve high ROI – even if you don’t know where to begin. While wellness technology may not be top of mind at the start, it will quickly become a need once you start managing multiple programs for clients (unless you decide to partner with a third-party wellness company to deliver them instead).

Human Resources consulting firms

It’s common for large HR consulting firms (like AON and Mercer) to offer wellness programs to clients as a value-add service. However, it’s becoming more commonplace for small and medium-sized HR consulting firms to do so too. As with all the organizations noted above, the more clients you work with, the need for wellness technology grows.

Health Systems

In recent years, businesses are asking for more preventative health programs for their employees and are looking to their local health community for help. There has been a significant interest by health systems looking to expand their health and wellness programs beyond their own workforce and health facilities to include local business. As a result, health systems need wellness technology to power their in-house employee wellness programs AND the wellness programs they deliver to corporate clients. For Community Health Systems starting out, download this checklist: [Get Started Providing Employee Wellness Programs to Local Business](#).

Essentially, whether you are delivering programs to your own workforce or to those of a client, effective wellness management is a must and so is technology to help you with it.

1.4 When Should I Buy It?

There is no hard and fast rule for when it’s time to buy technology; however, here are some considerations below:

- **Current Technology Isn’t Meeting Needs** – if you are already using a technology, then you may be wondering if it’s time for a change. [The 10 Signs It’s Time to Switch Your Wellness Portal](#) is a great resource and highlights some key consideration. Sometimes your technology just feels out of date, doesn’t offer an engaging user experience (on desktop or device) or is limited with features and/or device integrations.
- **Administration Time** – if it feels like a large part of your day is doing administrative tasks (e.g. registering employees in programs, manual communication, managing details on a spreadsheet, manual follow-up to make sure employees are completing their health assessments, etc.).
- **Privacy & Security** – when you are concerned that the personal health information you are maintaining is not in a secure format and could potentially be at risk.

- **Low Engagement** – if you are constantly sending emails that people ignore and are asking users to manually track results, people get discouraged. Most participants want to have some control over the process to track their own information (or automatically via a [wearable](#)) and many want to engage with their peers as they progress through their wellness journey. With the explosion of social networking in recent years, participants want to share their stories, seek support from a buddy or simply post a photo of the fun they are having getting healthy – all of which can't easily be done without technology.
- **ROI / Results Tracking** – when you are unable to accurately track whether your programs were well attended or achieved your program objective or goal.
- **Employee Health is a Corporate Priority** – it's well known that leadership support can make or break the success of wellness programs. If leadership makes employee health and well-being a corporate priority, then the buy-in to invest in effective management of programs will be a far easier sell. Know [how to sell wellness to c-suite](#) to gain their support to get started.
- **Population Size is Growing** – whether you are responsible for wellness programs at your own employer or if you are managing programs for multiple clients, size matters. The bigger the participating population, the harder it is keeping track of everything. It may simply become impossible to effectively do so without the help of technology.
- **Headache Factor** – this is also explained in the [ROI of Wellness Technology](#) later in this document but essentially, if your day is full of roadblocks and headaches, it may be a sign it's time for technology.
- **Missed Opportunities** – if you have some great ideas you want to implement but can't because it's too tedious or time consuming, it's a sign. As a program provider, missed opportunities equals missed revenue which won't help you grow as a company. With all the competition in the wellness marketplace, you need to be able to differentiate and innovate – technology can help.



1.5 Where Can I Buy It?

With a quick google search, you can find numerous wellness technology vendors. But, to make the process even easier for you, this list of [8 Sites to Help Corporate Wellness Companies Find a New Wellness Portal](#) can help you with your research.

Plus, many organizations aren't aware that there ARE different types of technology providers. As the wellness industry and related technology continues to evolve, there has been an increase in new technology options which is great for those shopping for new software; however, it can be confusing to navigate the market. [Understand the Two Types of Wellness Technology Providers](#) to better understand the differences as you prepare to find the perfect technology vendor.

In addition to google, it's good to ask around – colleagues in the wellness space can be a wealth of knowledge and a great source for honest feedback.

1.6 Should I Build or Buy Wellness Technology?

Years ago, when there were limited technology options available, it wasn't uncommon for companies to build their own technology. But, the question still arises and since technology can be a key competitive advantage for any wellness company, you should do some due diligence.

[Read four guidelines and download our white paper](#) to help you decide if you should build your own wellness technology, buy a market-ready solution or outsource. Of course, the decision is yours; however, good technology vendors have likely invested years of development and have learned some important lessons along the way. It would be unfortunate to invest in developing in-house to only discover it cost way more time, money and energy than if you partnered with a proven technology vendor. One of our partners [myHSA learned a tough lesson about building their own software](#).

2 Features & Functionality

Technology in general is constantly changing and evolving and wellness technology is no different. Technology vendors that are leading the way in innovation are consistently releasing new features and functionality to improve the administration and user experience. Every platform will have their strengths and weaknesses but there are [10 essential components of a wellness platform](#) that are important to consider when you're evaluating vendors.

Some platforms just focus on specific areas such as health coaching or content management but an all-in-one platform that brings all wellness components into one place should consist of the following features and functionality:

2.1 Wellness & Activity Challenges

Wellness and activity challenges are a great way to encourage healthy living amongst your employees and are a common entry point for organizations just beginning to offer a wellness program. Challenges can take many forms and cover many topics including physical activity, nutrition, weight management, sleep or financial wellness for example.

Because of their popularity most platform vendors will have [out-of-the box challenge templates](#) that can be used as-is. Platforms with advanced flexibility such as CoreHealth, provide the option for customers to change out-of-the box challenges or enable you to create your own customized challenges.

There are four common types of challenges (but not all technology offers all types):

- **Personal Challenges** – participants follow a specific journey through activities or education and track their progress (with or without associated incentive points).

- **Buddy Challenges** – participants can initiate and ‘challenge’ a buddy to a simple step-based or action-based challenge.
- **Team Challenges** – numerous users can participate in a team and compete against other teams (e.g. department vs. department, location vs. location, etc.). Team challenges are a great way to promote comradery, create a support network while getting healthy. Plus, it’s always entertaining to watch teams in the workplace encourage each other and poke a little fun at each other in the name of some healthy competition.
- **Individual Challenges** – these challenges allow participants to sign up for a friendly competition on their own or join and participate against other users.



Challenge Engagement

In addition to following [best practices for wellness challenges](#), wellness technology can drive challenge engagement through a variety of methods including:

- Gamification techniques
- Incentives
- Goal tracking
- Activity tracking
- Points accumulation for achievement of milestones, badges, incentive awards (e.g. gift cards, merchandise, charitable donation).

Plus the following:

- Maps which offer virtual adventure races
- Video is commonly used along with imagery, interaction through quizzes and required actions, group communication message boards, etc.
- Interesting educational content
- Surveys / Quizzes / Polls
- Group communication message boards
- Social networking tools
- Push notifications via email and/or text
- Incentives/rewards
- Personalization
- Evolution of design templates

Being able to leverage some or all of these in your challenges will help to boost engagement. Challenges have to be easy and fun.

2.2 Communication & Engagement

Employers that effectively use engagement strategies and [tailored communications](#) can drive higher wellness engagement rates. When communications appeal to an employee's unique intrinsic motivations it helps them to understand the personal benefits of participating in a wellness program. In order to appeal to an individual employee, it's vital that they can be easily reached and that communication methods can be customized.

A wellness platform should be equipped with a wide variety of communication capabilities such as:

- **Mobile** – with so many people attached to technology today, it's critical that the platform is mobile responsive and accessible via an app. The ability to send communications through text is another great way to make programs accessible to all users and to keep them engaged.
- **Email** – tried and true, email is an essential method of communication. Tools that allow emails to be sent to an individual and/or bulk email is an efficient method of getting the word out. In the case of coaching, a secure email mechanism is key.
- **Message boards** – message boards are a forum-style communication that makes it fun for users to interact with each other in a community setting to provide motivation and encouragement. Ideally, message boards can be assigned company-wide, by activity challenge, by team or special interest groups.
- **Push notifications** – various platforms can generate notifications, alerts or messages for certain programs and events. These can be especially useful when notifying employees of assignments or incomplete tasks.
- **Social networking** – integrations with social networks such as Facebook can allow employees to share achievements and encourage others. There are [pros and cons to social media](#) and employee wellness but it's important to note that social support is one of the key determinants of health.
- **Video Chat** – video chat can be an optimal tool for health coaches to collaboratively develop action plans and share health results.
- **Gamification** – Gamification provides a fun, interactive, and engaging user experience. Videos, imagery and colours all contribute to the look and feel of a platform. A unique gamification experience can work well with the gamut of well-being topics and activities and can play a large role in holding the interest of a user. Platforms that do it right often play with the imagination using virtual treasure hunts, wellness badges and adventures to keep the user experience fun.



2.3 Health Content & Resources

An essential component of health and wellness programs is education. If participants are better informed about the why and how they should improve their health, they will have the tools to make better informed decisions and positive changes.

In terms of technology, delivering health content/articles and resources typically is accomplished in one of the following ways:

Out-of-the-Box Content

Most technology vendors provide some sort of content out-of-the-box which could include simple health tips through to comprehensive articles and resources. This out-of-the-box content may be developed by the vendor's in-house writers, via a third-party writer or a third-party content provider (e.g. [Krames](#), [American Institute of Preventative Medicine](#) or another vendor).

It's a good idea to ask the vendor who writes their content.

Oftentimes, out-of-the-box content is shared with all participants, whether it's relevant to them or not (e.g. diabetes articles are being shared with people who don't have diabetes). While it's better than nothing, this can work against you with engagement. If participants receive content that isn't relevant to their specific health needs, then people tune out and disengage which is exactly the opposite of what you want for your wellness initiatives.

If this option isn't going to work for your audience, then the next two may be a better fit.

In-House Content Development

If you want to deliver content that is highly specific to your audience (e.g. Christian, disabled persons, common health issues for office or manufacturing workers, etc.) you may wish to develop your own content in-house that is highly relevant. If this is important to you, then it's important to work with a technology vendor that enables you to develop and deliver your own content to participants – not all vendors offer this.

Third-Party Content Provider

If you don't have the internal resources or desire to produce content in-house, you can work with a third-party content provider. Depending on the technology vendor, they may have select content providers you need to work with (usually because they have an established integration) or they may give you the flexibility to use a preferred provider of your choice. If you go this route, then it's essential that this content can be seamlessly accessible via the technology to provide a better end-user experience.

This option provides excellent flexibility as you can work with a content provider that is most suitable for your audience; especially if it's a priority to deliver micro-targeted content very specific to a health risk or topic of interest. One vendor that does this well is [HealthFeed](#) – they deliver contextually specific, targeted and member-specific educational and health content with detailed analytics.

Now that you have a better understanding of where health content usually comes from, you can make an informed decision as to what will work best in your workplace(s).

2.4 Health Assessments & Biometrics

The importance of identifying at-risk employees early can't be overstated. Health assessments present a huge opportunity to equip the employees who need it most with actionable information for improving their health. This ultimately helps employers achieve reduced healthcare costs and a greater ROI from their wellness program.

Wellness platforms offer toolsets that allow site administrators to schedule one-on-one events such as biometric screenings or health assessments. With the ability to control, plan and schedule site administrators can:

- Enable users to book appointments and receive pre-appointment reminders
- Schedule appointments in advance and have them appear in user calendars
- Send appointment reminder alerts through email, direct messaging or push-alerts/text
- Create and assign schedules via location and/or risk for specified time periods

Health Assessments

A top-notch health assessment uses a scientific, evidence-based approach to gain a deeper understanding into an employee's health status, level of risk and readiness to change. There are many different types of health assessments in the market but this list of [7 Top Health Assessment Resources](#) can help provide some good options.

Although flexible wellness technology allows you to create, modify and distribute any type of health assessment or questionnaire the three most common types of health assessments are:

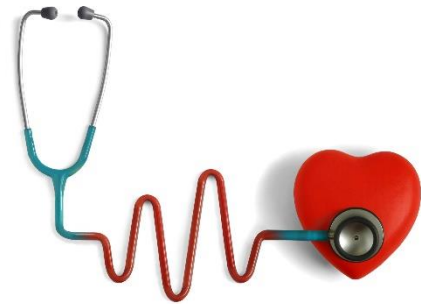
1. **Health Assessment and Lifestyle Questions:** based on biometrics (blood pressure, cholesterol, glucose, triglycerides, weight, HDL, LDL, total cholesterol, height, body fat and BMI) and on lifestyle (nutrition, physical activity, sleep, tobacco and alcohol use).
2. **Mental Health and Emotional Questions:** based on stress coping, relaxation, resilience, energy to spare, thinking clearly, feeling good about myself, relationships and family, career, social, confidence, interest in new things, cheerful outlook and depression screening. One clinically-validated mental health and well-being assessment is provided by [MindQ](#).
3. **Paper-based Questions:** some platforms will also include the option to manually enter a paper-based questionnaire or import it into the platform via a third-party tool.

A common requirement is for health appraisals to be [NCQA-certified](#). The National Committee for Quality Assurance is a private, not-for-profit organization dedicated to improving health care quality. Organizations incorporating the NCQA seal into advertising and marketing materials must first pass a rigorous, comprehensive review and must annually report on their performance.

Biometrics

Data gathered from biometric testing can be crucial for creating results-oriented wellness programs and have become a staple in corporate wellness programs. Knowing the [pros and cons of biometric screenings](#) can help you benefit the most from the process. Wellness platforms that support biometrics will include the scheduling and storing of any type of biometric data from a variety of sources including:

- Activity (active minutes, average heart rate, resting heart rate etc.)
- Sleep (sleep duration, awake times, restless times)
- Blood (blood pressure, blood glucose and blood lipids)
- Weight (weight, body-fat percentage, BMI and waist circumference)
- File-feed capabilities



Platforms that include file-feed capabilities can receive large file-feeds from other vendors in the event that a third-party vendor is facilitating a biometric screening event and is unable to directly plug data into the platform as the event is going on.

2.5 Health & Wellness Coaching

One of the [most effective wellness programs is health and wellness coaching](#) which are typically delivered in-person, virtually or self-directed.

Tools for Health Coaches

For health coaches to effectively implement their wellness strategies they must have the right tools. A robust wellness platform will typically include tools and functionality to support coaching programs throughout their entire lifecycle.

Health coaches can create and administer their own programs and use platform communication methods such as telephonic, video or in-person communications to administrative tasks such as scheduling of appointments, providing content and managing notes and tasks.

Using technology health coaches can create and administer their own programs using platform tools such as:

- Scanning and uploading document files
- Caseload assignment where users can select appointments based on coach or time frame
- Client visibility to see what the user is doing to aid in setting goals and discussing progress
- Recording of notes and action items
- Creating and renewing programs, educational campaigns and self learning programs
- Scheduling appointments and sending reminders



- Events calendar for events such as lunch and learns, group activities or classes
- Tracking outcomes and goals
- Telephonic, video and chat communication tools
- Screen sharing to share health results and collaboratively review action plans

Essentially, technology facilitates all the administrative components for a health coach so they can focus on doing what they do best – coaching their clients to achieve improved health.

Tools for Self-Directed Coaching

Technology can also help you develop self-directed coaching programs that focus on key areas or topics (e.g. smoking, sleeping, stress, etc.) and typically focus on education and goal setting.

Depending on the platform, self-directed programs can be sequential and could involve completing tasks such as reading articles, completing forms, watching videos, setting tasks (e.g. getting a physical) and personal goals. Completing specific steps in a self-directed coaching program and/or through to completion can also be linked to incentives (e.g. participants that complete self-directed coaching programs receive points or rewards) which should all be facilitated through the wellness technology for a seamless user experience.

Two excellent example of a self-directed coaching programs that were developed on CoreHeath's coaching module are:

- [Life Skills for Success](#) program by Edington Associates
- [Wellcoaches@habits](#) program by Wellcoaches - a leading school of health and wellness coaching

No matter what type of coaching program(s) you choose to offer, your technology provider is integral to helping you deliver.

2.6 Incentive Programs

Behavior change is one of the most difficult things for people to accomplish. Unless intrinsically motivated, some employees will have a hard time making healthy lifestyle changes. This is where incentives can help.

The difference an incentive program can make on a wellness program's success can be significant although [incentives are controversial](#). Most successful wellness programs provide some type of incentive program and there are numerous ways of going about designing one. Properly structured incentive programs built using the right tools can have a large impact on specific actions or behaviors from users.

Wellness technology will often include options to earn points that represent progress or dollars earned. Users can be rewarded points for any actionable item on the platform as well as for off-site events. When certain levels of points are reached, users can redeem them via an third-party incentive fulfillment vendor when their services are integrated into the platform.

For example, technology offers the flexibility to determine how to track and award points through a variety of options such as:

- Scheduling a biometrics appointment
- Completing a health assessment
- The number of hours slept, amount of exercise or type of food eaten
- Amount of weight loss

Essentially, [incentives are about encouraging healthy habits](#) on an ongoing basis so participants eventually transition from being extrinsically motivated to intrinsic which is the foundation for creating long-term, permanent change.

Some governments provide legislation around what can and can't be offered as incentives so be sure to check with your local regulators as what rules may apply.

2.7 Reporting & Metrics

Reporting and metric functionality are crucial to understanding how your wellness program is performing and how user health is progressing at a member, group, geographic level or any preferred data segregation method. This allows for improved decision making and rapid feedback on what's working and what needs attention.

Many people think [reporting wellness program results is difficult](#). However, comprehensive reporting capabilities should provide an endless range of measurable data points to help you define exactly what it is you want to track and how you want to report it. There are numerous options for reporting such as:

- Data from third-party systems
- Custom/ad hoc reports
- End user reports/individual participant reports
- Data filtering
- ROI
- Predictive analysis
- Performance measures/stratification
- Data exports
- Benchmarking
- Administrative dashboards



Given a platform's ability to pull data from within and via third-party integrations, there should be limitless opportunities to analyze data on anything from illness and absentee costs to reducing workplace accidents or trends in employee engagement. A platform will offer a chance to examine how long-term trends influence effectiveness within the workplace, and demonstrates where changes can be made.

Once you've determined your metrics, you can examine long-term trends that influence the workplace and make decisions on what changes should be made. [Reporting the results of wellness programs](#) are essential to influence the design of future programs and to gain leadership support.

2.8 Other Desirable Features

Beyond the core features and functionality in wellness technology, here are some other noteworthy features:

White-Labeling and Branding Capabilities

- If you are a wellness provider that plans to re-sell the platform to your clients, then the ability to tailor each portal to match each client's brand and unique requirements will be essential.
- This is an important feature as the capabilities to do this really varies from vendor to vendor. Some only enable you to replace a logo and text colors; however, other vendors give you incredible flexibility to change brand and so much more.

Audit Trails

- Your technology should have logs and auditing capabilities to track site changes including modifications and deletions with details about *what* was changed and by *who*.

Multi-tenancy

- If you're a wellness provider managing portals for multiple clients, then multi-tenancy is important. This enables you to manage your book of business more easily while still maintaining logical data separation between your customer data. This data separation facilitates better reporting so you can analyze employee data (e.g. by location, by department, etc.) Wikipedia provides a further explanation of [multi-tenancy](#).



Restrictions/Limits/Scalability

- If you're a wellness provider planning on growth, scalability and system restrictions/limitations is essential to know in advance.

Ask the vendor what kinds of limitations they have? Can they scale as you grow? Can you maintain multiple database instances to track each client? Can you logically segregate each instance so you can deliver a customizable view for each client? Ask for proof and examples.

This is important because if you can't segregate each client site, then you will may have reporting limitations. For example, you won't be able to segment your reports for each client site – you will only be able to report on the platform as a whole which isn't conducive to determining ROI for each client.

In addition to these, read the [10+ Must Have's in Corporate Wellness Technology blog](#).

2.9 Third-Party Integrations

New services are constantly entering the marketplace offering ‘the next best thing’ and include everything from financial wellness and stress management to incentive fulfillment and wearable devices. One of the largest issues for wellness platforms today is the [number of inter-related solutions](#) that go into delivering successfully integrated wellness programs that can offer wide-ranging services.

Platforms can use several tools to share real-time data through third-party integrations such as single-sign on (SSO), Application Programming Interface (API's), web services, and flat file import/export solutions. There are also data aggregators such as [Validic](#) that can provide additional integrations to popular devices and apps and their data for an additional cost. Tools like [HC Cube](#) can help you analyze health coaching engagement against gaps in care or trend claims cost against improved mental health risks.

An advanced platform will typically have a few options for integrations including a:

- Application Programming Interface (API)
- JS Framework
- Widgets API
- SAML2 Overview
- Single Sign On (SSO) on a Web Service

Extensive development work amongst various services is required to contribute to a seamless user experience and provide cohesive data analytics. It's important to understand what the capabilities and limitations are of a platform when it comes to integrations.

Wellness platforms are being asked to ‘talk’ with a myriad of systems such as:

- Human Resources Information Systems (HRIS)
- EAP systems
- Incentive Fulfillment Providers
- Clinical Systems
- Intranets and internal systems
- Wearable Devices
- Wellness apps / corporate wellness apps
- EMR systems

Integrations with these services is a key strategy for platforms that don't offer a comprehensive solution. Through API's, platforms can directly integrate with additional services in the marketplace and continue to provide a seamless user experience while meeting ever changing user demands for services.

If transferring data to/from a laboratory system or health system, a [Health Level-7 or HL7 interface](#) is essential so you know the integration is following the international standards for data transfer.

Each integration tends to have unique requirements, but once it's understood how two systems need to interact with one another, a solution can be found. Anything is possible with wellness technology when the right puzzle pieces are there.

2.10 Privacy & Security

Given the fact that wellness platforms manage health data, privacy and security is of the utmost importance. Read the [6 most common privacy and security vulnerabilities in wellness portals](#) to help you identify what to look out for.

There are various ways that wellness platforms can ensure the privacy and security of users including:

- Using a least-privileges methodology
- Application access that is granted through a combination of roles and permissions
- Granting only user level permissions for new users
- Password strength requirements that are fully customizable
- The use of independent databases for each customer

Once you know what the 6 most common vulnerabilities are, learn the [6 Best Ways to Prevent Privacy and Security Vulnerabilities](#).

As you prepare to discuss privacy and security requirements with technology vendors, it's helpful to know the [Top 10 Security Questions When Choosing Wellness Technology](#) or read [our blog](#) for further details about privacy and security.

HIPAA Compliance

HIPAA, the Health Insurance Portability and Accountability Act, sets the standard for protecting sensitive patient data in the United States. Any company that deals with protected health information (PHI) in the US must ensure that all required physical, network, and process security measures are in place and followed.

There [are 10 top ways to maintain the security of your wellness platform](#) and ensure your programs abide by employee privacy laws.

3 The ROI and VOI of Wellness Technology

Depending on where you are at as an organization and in the continuum of your wellness programs (see the [3 wellness models](#)), you may choose measure your wellness technology using ROI, VOI or a combination of both. If you are just new with your wellness programs, you may find VOI is the measurement of choice; however, as your programs (and your technology) get more sophisticated, ROI may be the preferred measurement – or both! Read on to learn about the ROI and VOI of wellness technology.

3.1 ROI of Wellness Technology

As with everything in business, ROI matters - workplace health and wellness programs are no different. However, with wellness programs, it can be difficult to determine exactly what to measure and how to report the results so it's important to determine the [Why for Wellness](#). Some wellness experts even have a [fear of reporting wellness program ROI](#) (what if you don't get the results you expect?).

As a health and wellness professional, you are often [selling wellness to c-suite](#); however, what about wellness technology? Are you measuring the ROI and investment in technology? Is that something people even give much thought to? If they don't, they should.



3.2 How to Measure ROI

As with all things wellness-related, measuring can be tricky; however, this is what we suggest companies do to quantify the value of an employee wellness portal investment in terms of dollars or other measurable results.

- **Time Savings** – Estimate the time you currently spend on administrative tasks, especially ones that are done manually in Excel such as tracking rewards. With your current system (whether it be on a spreadsheet or software), how long does it take to develop new coaching programs? Or create and promote new wellness challenges? Track time spent and then measure the before and after.
- **User Experience (UX)** – Users of your wellness portal are the 'make or break' measurement of your technology. If you are seeing an increase in user complaints and technical issues which seem to coincide with program participation decreasing, this is a HUGE red flag! If your technology is painful to use and does little to engage, you have little ROI.

A relatively easy way to measure UX is surveying participants about their portal experience. The results will serve as your starting benchmark to measure against in the future, whether you stick with your current software and try to improve it or invest in a new system altogether. The before/after results can be quite telling and be indicative of ROI.

While more difficult to measure, seeing a decrease in program participation may be indicative of a problem with end user experience.

- **Program & Service Limitations**
 - Are there programs or services you would like to offer but can't because of existing limitations?
 - Are you able to keep up with your competitors or better yet, are you able to innovate and stay ahead of your competitors?

- If you could offer new programs/services, what's your expected revenue potential? (e.g. if you could offer video coaching in-house, what's the potential of your existing client-base to purchase and for how much?). If you aren't sure how much you should charge for certain wellness programs, check out this blog [A Wellness Company's Programs and Pricing for insight into common program pricing](#).
- Are you having to outsource key programs because you can't manage it in-house? For example: can you create your own wellness challenges or create self-directed coaching programs in-house? If not, you may be hiring a third-party to provide which incurs an additional out-of-pocket cost. One wellness provider is now able to manage coaching on their own with new technology thereby [eliminating \\$154K in third-party coaching costs](#).
- **Hard Costs** – when comparing wellness technologies, there is a real variation in pricing options (see [Costs](#) below) for licensing and implementation. You can't ignore the potential savings of switching from one technology vendor to another. For example, [Hamilton Health Care System saw a savings of \\$83K per year in annual licensing costs](#) after switching to CoreHealth from their previous wellness technology vendor. Do your due diligence and carefully compare hard costs.
- **Headache Factor** – everyone has tasks they avoid doing in their jobs; however, if simple tasks are a constant headache to get done, it's important to consider these too as a measurement of ROI. The 'frustration' factor is hard to quantify but it's still important to note. You may want to develop a 1-5 rating scale for all those regular tasks you do today and rate 1 (no headache) to 5 (BIG headache). You may be surprised how many 'headache tasks' you do in a day – some of which may be avoidable with technology.

'headaches' = extra time spent = more money spent.

- **Scalability** – if you are a provider looking to grow your client-base, scalability is essential. If your technology cannot easily scale (thereby preventing you from growing to your full potential) then you'll have to make some assumptions about the 'missed revenue potential'.
- **Rockstar Factor** – if you can't say "I created the coolest new program with XX% employee participation", then you may not be getting the ROI you deserve. Similar to the headache factor, it's harder to quantify but worthy of noting. Of course, this is all dependant on how much your company's reputation for being an *innovator* matters. Industry leaders are the ones that make the largest impact:

Innovation = Competitive Advantage = Increased Growth = Increase Revenue

- **Wellness Program ROI Measurement** – if your wellness program is new, or if your technology can't effectively measure the ROI of your wellness programs, you've got a problem... you need to be able to do that for your clients to reinforce the value you bring to the table. In addition to proving ROI, ideally your technology should help you explain the VOI (Value on Investment) with a tool such as an [Executive Dashboard](#) that tells the organizations health and engagement story. See the [VOI of Wellness Technology](#) below for further details.

Plus, the ability to accurately [integrate wellness program data with claims experience](#) and other employer information, in one unified view, is the holy grail of wellness. Formulating all this business intelligence into one platform is hugely valuable for employers looking to prove program ROI and influence future program decisions.

- **Customer Service** – we all know time is money... if you're spending hours on the phone with your software vendor's technical support team, this is costing you money. Estimate how much time you are spending but, even more importantly, are you getting solutions to your problems? Are you 'just living with it' because you've exhausted all options? Depending on your answers, you may not be getting ROI plus you likely have a high 'headache factor' and a low 'rockstar factor'.

These are just some of the ways you can quantify the ROI of wellness technology. Perhaps you have other pain points not mentioned here – note them and determine how you can best measure the before and after results.

Tip: Ideally, decide and track which measurements will be your benchmark **BEFORE** you start researching and evaluating new technology vendors. This will help you determine ROI **AFTER**.

3.3 VOI of Wellness Technology

Similarly, to ROI, the Value on Investment (aka VOI) is a common form of measurement in the corporate wellness space; however, does it apply to wellness technology too? Sure it does!

What is VOI?

Before we delve into how you can determine VOI from wellness technology, let's first understand what it is.

The VOI concept was first introduced by [Gartner](#), the leading information technology research and advisory company and is defined as: "intangible assets that contribute heavily to an organization's performance. These intangible assets include knowledge, processes, the organizational structure, and ability to collaborate. Where ROI is the measure of the tangible benefits of a project or activity, VOI is the measure of the intangible benefits of a project or an activity. VOI includes ROI."

3.4 Determining the VOI of Wellness Technology

So, if VOI measures 'soft' initiatives that aren't easily measurable with dollars or time savings, here are some ways to measure the VOI of wellness technology:

- **Company Culture / Employee Engagement** – Technology that boosts employee engagement, comradery and enables people to better connect with each other (e.g. teaming up on a health challenge, encouraging office 'walks', sharing success stories, etc.) and improve their health ultimately influences company culture in a positive way.

- **Removes Company Hierarchy** – in some organizations there is a clear hierarchy of staff and leadership which is often separated by physical (e.g. leader's offices are located on top floor, managers get offices/staff sit in cubicles) and non-physical barriers (e.g. top-down corporate environment, heavy focus on organizational chart/chain of command, leadership style (do they stay in their office or mingle?), internal communications (do managers proactively meet with all staff levels? Is there an 'open door policy'?)

It's commonly known that the most successful wellness programs include leadership support and involvement. If your technology better enables interaction between all levels of employees (e.g. sweating next to the CEO), it helps to remove company hierarchy and facilitates social connection.

- **Caring – a Shared Value** – as wellness pioneer Dee Edington indicates in the blog [Caring is a Shared Value of Employees and Organization](#), if both management and non-management employees demonstrate a mutual concern for each other's health and wellness, then the **Value of Caring** plays an integral role in a healthy organization.

By virtue of making the financial and human investment in wellness technology, the organization is demonstrating a genuine interest in helping employees, and their families, to improve their health and overall wellbeing.

- **Fun Environment** – when we play at work, we get to know our colleagues in a more relaxed, social way, which helps to grow relationships. Wellness technology that enables fun, friendships and play at work boosts VOI. Read more about [The Importance of Play at Work](#). According to this [research](#), "When an employee has someone at their place of work considered a "best friend," one of the biggest winners is the company.



When employees are working towards common personal goals (e.g. losing weight, quitting smoking, etc.) friendships tend to develop when they may not have otherwise happened. Technology can help facilitate these connections.

These are just a few examples but demonstrate how wellness software (and the people using them) can facilitate improved health, engagement and friendships.

4 Researching & Evaluating

So you've decided new wellness technology is a priority. Now what?

The journey to find the perfect wellness portal can be an arduous one. There are so many things to consider and vendors to evaluate it can be difficult to figure out where to start. It can be especially challenging if project management skills aren't your strength.

To help you make the whole process much simpler, we've provided a [Playbook for Researching and Evaluating Wellness Technology Vendors](#) that will assist you with:

- Identifying your current pain points
- Determining your project goals for new wellness software
- Identifying and prioritizing your functional requirements for a new system
- Guiding you through the entire vendor research and evaluation process.

4.1 Internal Project Manager

If your internal project manager hasn't been determined already, this is a good time to decide as he/she will keep the process on track. Here are some things to consider when selecting your project manager.

He/she is:

- Experienced managing projects already (ideally) and has had proven success.
- Familiar (but doesn't have to be an expert) with your business, processes and people.
- Inquisitive and skilled at asking good questions.
- Process-driven and is diligent about taking notes and holding others accountable.
- Well respected, liked and easy to get along.
- NOT a 'yes man' – sometimes hard calls will be made and there may be conflict among the team but it's important that the project manager can help the team move past the internal politics and stay on track with project goals. It's better to have a leader in this role – not a follower.

Once the project manager has been identified, the project can get started. The playbook outlines the process in more detail and includes the following stages.

4.2 Identifying Your Project Objectives

Understand, at a high-level, what problem and/or challenges the organization wants to overcome with this new wellness portal. Sometimes, it's a leader (sponsor) that tells you (the project manager) what the overarching problem is. Typically, the process starts from a pain point.

4.3 Determining Your Project Team

Identify your internal project team from a cross-section of resources including Project Manager, Sponsor and your core project team of subject matter experts (SMEs) familiar with your various departmental and/or functional needs and wants.

4.4 Needs Assessment

Ideally you (and/or your project team) meet with key stakeholders (e.g. end-users, site administrators, decision makers, etc.) that can act as department or functional representatives to understand and develop the business case (what problem are you trying to solve?) and dig deep into pain points and expectations.

This phase is quite time consuming and in-depth. This is a time to review existing processes, procedures and ask as many questions as you can and document everything! (You just never know when you'll need to reference past notes and discussions.) This phase helps you formulate your functional requirements, priorities and define your project objectives.

To assist you with the process, the [playbook](#) also includes an **in-depth RFP template** that will help you get the process started. Even if you never distribute it externally to vendors, it will help you identify your needs and prioritize. Clarity on what you want and need is a good thing before you start looking at vendors.

4.5 Vendor Research

There are many wellness portal vendors on the market (check out [8 Sites to Help Corporate Wellness Companies Find a New Wellness Portal](#)) plus ask around for referrals from colleagues and LinkedIn connections. You can start to filter out non-suitable vendors quickly if you have identified your requirements and priorities clearly in the previous step.

4.6 Vendor Demos & Evaluation

Evaluate how your prioritized functional requirements are compared to vendor capabilities.

1. **Vendor Demos** – your preliminary internal vendor evaluation is complete and you are ready to see some demos.

This is a very important stage and one that can quickly fall off the rails.

It's important to provide vendors with a demo flow aka "script" with an agenda *in advance of the demo*. This gives time for vendors to appropriately prepare for the presentation and address key areas and requirements to help YOU make an informed decision.

We provide a [sample agenda and demo script/flow](#) to assist you with the process and get the most of the demo experience.

2. **During-Demo Evaluations** – when you watch multiple demos, it's easy to forget who showed you what and what you liked/didn't like and the merits of each.

It's important for evaluators to be provided with guidelines on what they should be looking for with a method for evaluating and rating. This can be accomplished in a variety of formats but one way is with an [Evaluator Scorecard](#) (which you can edit and distribute as you wish). It's a helpful tool to guide your internal stakeholders on what to look for so you can have an efficient discussion at your internal debrief.

3. **Internal Debrief** – after all vendor demos are complete, all evaluators should reconvene to review and discuss the merits and pros and cons of each vendor. There may be one or a few debrief meetings required. If your evaluators completed their Evaluator Scorecard, this process will likely be smoother.

Sometimes, a clear winner is obvious but if not, be prepared for a courteous 'debate' - it's important to discuss all points and concerns to minimize stumbling points for the project going forward.

4. **Vendor Short List** – during the debrief process, you sometimes determine a clear winner (which makes things easier) but sometimes it's not so clear. It's important that everyone has their say. You may also need to see some 'deeper dive' demos to ask any outstanding questions. It's always wise to identify your top choice and a runner-up (in the event there are surprises).
5. **Vendor Reference Checks** – it's up to you to decide if you want to contact references for both your top choice and runner up; however, it's essential you check references for your top vendor. As the project manager, it's most efficient if you brainstorm your questions first and then invite your project team to provide any additional feedback or questions - you just never know what you may overlook.

4.7 Decision & Contract

Wow! It's been a long process but you are almost there! After debrief meetings, reference checks it's time to decide – hopefully your reference discussions just solidified your choice but if not, go back through the process again.

The playbook will provide you with an excellent framework to support you with researching and evaluating wellness technology vendors.

5 Costs

The cost of wellness software really varies depending on your needs and the technology vendor. For example, if you need a vendor to run your wellness programs AND your technology, then the vendor will charge accordingly (and may work the cost of the technology into the overall program costs); however, if you are looking for just the technology, the following is common in the industry.

5.1 Licensing Options

1. **PEPM = Per Eligible Per Month**

An eligible participant (employee, spouse, manager, etc.) is anyone who is provided access to the system. They may be uploaded via an eligibility file or they may create accounts upon registration. Regardless of how many participants access the system, the organization pays for all who are eligible to register (e.g. organization has 1,000 employees – all of which are eligible. Customer pays monthly for 1,000 employees).

2. **PEPY = Per Eligible Per Year**

As per above, an eligible participant (employee, spouse, manager, etc.) is anyone who is provided access to the system. This pricing model covers the entire year versus one month. The option to purchase for less than a year is not applicable.

3. **PPPY = Per Participant Per Year (aka Per Engaged)**

Engaged employees are those employees that access the system. Organizations must pay the minimum license fee (as per contract) and any users over that number will be billed upon reconciliation (typically quarterly).

4. **PEV = Per Eligible Volume or Per Engaged Volume**

For large organizations over a certain number of employees, volume pricing is available with tiers and associated fixed price options.

Per Participant/Engaged pricing is always paid annually (no monthly option available).

5.2 Minimum Annual Licensing Fee

It's fairly common practice that vendors apply a minimum annual licensing fee so if your volumes are below a minimum threshold, you will be responsible for the minimum. It's important to ask if a minimum fee applies. A quick calculation of your estimated participant population x license pricing will help you determine how many users you need to cover this fee.

5.3 Flexible Pricing Options

Some vendors are more flexible with their pricing than others so it's important to ask.

- **Volume Pricing (based on Eligible)** – not all vendors provide volume pricing but some do so it's important to ask each vendor. For example, CoreHealth provides volume pricing where a customer can choose a specific tier at a fixed price with the option for a one-time trade-up option to a higher volume pricing tier.
- **Licensing Type** – some vendors, including CoreHealth, provide the flexibility for customers to switch from paying PEPY to PEPM.

5.4 Implementation Costs

Just like there is a variety of licensing costs and options, implementation may vary too. There is no 'one' implementation approach but here are a few options:

- **One-Time Implementation Fee** – some vendors charge a one-time implementation cost that includes software setup and user training; however, some may separate these fees.
- **Implementation Costs Part of License** – some vendors may spread the initial implementation costs out over the length of the contract to reduce the ramp up of a new technology.
- **Hourly** – some vendors may charge you an hourly rate for the time spent on implementation and training.
- **Per Client** – some vendors charge a fee for each client you onboard and may include adding a logo and perhaps changing screen colors.

Tip: Once your team is trained on the platform, you are often ready to run with it; however, what happens when your site administrator leaves the company? This can result in a huge gap and risk with your technology investment. Your vendor should provide ad-hoc training if/as required and may apply a separate training fee at that time.

5.5 Third-Party Integrations

Third-party integration costs can vary greatly and will depend on the platform integration capabilities, the type of third-party service and the type of integration (e.g. one-way, bi-directional, etc.) required to share data. In many cases the technology vendor has already implemented numerous types of integrations which can serve as a guideline or base, but typically custom development is still required with each new integration to provide the best solution. The more complicated the integration the higher the cost. Some vendors charge \$2,500 per integration, some \$20,000 or more so it is key to understand this area.

5.6 Technical Support

It's fairly common practice that technical support is included in the annual licensing costs; however, there are still some vendors that charge you extra for technical support. It's important to ask vendors if technical support is included in licensing fees or an additional cost.

5.7 Software Upgrade Costs

If your technology vendor is a SaaS provider (Software as a Service), they should have a record of providing new software releases at least 1x per year (for comparison CoreHealth typically provides 2-3 releases per year) as technology can quickly become out of date.

Depending on the vendor, they may or may not charge you extra for new releases or they are included in the annual licensing fees.

One of the advantages of working with a technology-only company is that they continue to re-invest, innovate and strengthen their platform to respond to the constantly evolving market and the needs of the industry helping you to stay leading edge with your programs and services.

6 Implementation

Once you've decided on a wellness technology provider it's time to get the show on the road! The implementation stage is where your technology solution comes to life as your portal is developed and tailored to your program specifications and requirements.

Before signing the contract, you and vendor should agree on the details of a statement of work (SOW) which breaks down the project objectives, project scope and deliverables. Upon agreement and execution, a project plan is developed that provides a detailed breakdown of project tasks, timelines, resources and milestones.

6.1 Implementation Approaches

During the SOW and contracting phase, you will discuss and determine your preferred implementation approach with related costs.

Typically there are two options:

1. **Self-Guided Implementation & Training** – this is where you receive user training first and then you configure the system to your specifications. Depending on the vendor, their involvement with the configuration and training process may be some or almost no involvement. This is typically less expensive as vendor involvement is minimal but may increase your risk. Self-guided implementation and training is typically available with an Application versus a fully functional Platform.
2. **Vendor-Led Implementation & Training** – this is where the vendor leads you through the implementation and configuration process (with the vendor doing the configurations in the system). There is typically a deeper discovery process and, if the implementer is skilled, they will help you work through any challenges you may have with transitioning from the 'current way of doing things' to the 'new way of doing things' to ensure you leverage all available features and functionality. This is typically more expensive as vendor involvement is extensive but it can help decrease your risk.

But, depending on the vendor, an altogether different approach may apply. Just ask!

6.2 Vendor Resources

You will likely be assigned one or many vendor resources that will provide support to your project team during the implementation process which may include:

- **Project Manager** – manages the kick-off of planning through to the 'go live' date.
- **Implementation Specialist** – assists with gathering of detailed requirements, configuration of the platform and administrator training to set administrators up to be self sufficient in the future.
- **Development** – if you have custom requirements, then someone from the vendor's development team may be assigned.
- **Account Manager** – your personal advocate who presents your ideas, feedback and suggestions to the development and implementation teams.
- **Support** – your 'go to' team to assist you with any technical questions you may have once your site has gone live.



Executive Contact – hopefully it doesn't happen, but if you hit any bumps along the way with implementation or thereafter, it's always helpful to know the contact of a senior leader at the vendor you can call if need be.

6.3 Customer Resources

It takes two to tango so you can't rely 100% on the vendor to set you up for success – you need to allocate sufficient human and financial resources too. If there are gaps in your in-house resources, it's important to tell your technology vendor as early as possible (hopefully it's identified during the sales process) so you can work together to identify what needs to be done and by who (e.g. a vendor resource, a third-party contractor, temporary staff).

It's important to ask your technology vendor what in-house resources are required to facilitate a successful implementation process.

Depending on the size and scope of your implementation, you may need some or all of the following resources:

- **Project Manager** – works with the vendor's project manager/team, attends regular meetings, coordinates deliverables and oversees own project team.
- **Wellness/Clinical Lead** – someone who is qualified to create and/or review/approve content for challenges, health assessments, etc.
- **Site Administrator** – while many of these resources listed here may be necessary only during the implementation process, **your Site Admin is a critical resource during implementation AND after 'go live'**. He/she is the system expert (ideally, you have more than 1 site administrator) who is essential to the ongoing maintenance and support of your technology investment. They are often the point person for end-user questions and responsible for new system configurations, developing new programs and communicating to participants.

Once again, we recommend you have more than one site admin as back-up for vacations and in the event he/she leaves the company.

Important Note: Should your only site administrator leave the organization without facilitating knowledge transfer to a replacement, it's recommended you contact your vendor immediately so they can support you with effective user training and transition for a new site admin to ensure your ROI investment continues to pay off.

- **Graphic Design Specialist** – depending on the level of sophistication and flexibility of the technology and your design requirements, a graphic resource will be helpful (but not always necessary) to help you design wellness portals for your clients. This can be handy if you are tailoring unique solutions for your clients.
- **Communications Specialist** – depending on how much or little promotional support your technology vendor provides, it's ideal to have an in-house communications person that can develop end-user and promotional materials to encourage program participation and engagement.

- **Technical Specialist** – similarly to the Graphic Design Specialist noted above, depending on the level of sophistication and flexibility of the technology and your technical requirements, in-house knowledge of HTML, CSS and other technical skills may be required.
- **Sales/Marketing Specialist(s)** – If you are a wellness provider, you are already promoting your wellness solutions so your in-house team needs to position the technology as part of your solution. Your in-house resources will need training to understand and develop promotional material you can share with prospective and existing clients. Your wellness technology is a competitive advantage so it's important you do a great job promoting it.

Ideally, [your technology vendor provides you with marketing resources](#) and tools to help you sell so you aren't developing marketing content from scratch.

- **Testing / Quality Assurance Specialist** – while your vendor will support you with technical testing, it's a safeguard to have an in-house resource that is another 'set of eyes' that can review all content, features, communications and language translations (if applicable).
- **Executive Contact** – in addition to the main project team, it's always helpful for the vendor to know your executive project sponsor and/or primary contact at your organization so periodic check-ins can occur to ensure you are completely satisfied with your technology investment.

6.4 Implementation Process

Many vendors follow a similar implementation process noted below but your vendor should provide some more specifics during the sales process:

1. Signed Contract

Upon contract executive, there may be a kick off call, project team introductions, configuration discussions and training plans.

The next two steps of **site configuration** and **user training** may switch in order depending on the chosen implementation approach as noted above.

2. Site Configuration

Gather specifications for site design, user registration requirements, type of program and program components, modules required, URL, etc. and implementation of these specifications.

As noted above, depending on your chosen implementation approach (e.g. self-guided or vendor-provided), the site configuration may be done by your organization or by the vendor.

Important Note: Depending on the technology's flexibility and ease of configuration, you may be able to make all future changes (and *not* require vendor involvement); however, not all platforms offer this. It's important to determine if you are able to make systems changes or if the vendor has to and, if so, what charges will apply for vendor-made changes.

3. User Training

Depending on the training format your vendor provides (e.g. in-person, virtual training via conference call, on-demand videos, written training documents, help resources, etc.) and your chosen implementation approach, user training may occur immediately and before site configuration since you will be configuring your own system.

If the vendor is doing the initial configurations, the user training may happen during or after the configuration process. It's just important they show you how they configured the system so you can be self-sufficient after 'go live'.

4. Site Testing

Your vendor should conduct some preliminary technical testing and then give you access to a test account with your configurations/customizations. This is **your opportunity** to identify/make any additional configuration changes, identify any bugs and tweak the user experience (a user friendly and engaging user experience is a must!) before the site goes 'live'.

Ideally, involve as many people as possible in the testing process. You may be inclined to speed through this step or skip it altogether but DON'T.

Initial rollout can 'make or break' the launch of a new system.

If a new user logs on for the first time to discover the portal is 'bug-y', not intuitive or engaging, they won't be back and GOOD LUCK convincing them to try again once all the fixes are made.

Note: Depending on the vendor, they may provide you with the opportunity to request one or several rounds of design changes (this is usually specified in the contract) so it's important to know exactly how many site changes you are allowed to make and costs associated with them.

5. Program Launch – 'Go Live'

This is a critical stage in the process when you rollout the new system to users. If you haven't started on a communications and rollout strategy already, start now! Communicating to users is essential to implementation success. Make sure you get people excited and engaged BEFORE 'go live' date and then maintain or increase the communications once it's 'live'.

Here are some ways organizations communicate to their workforce to create some hype:

- Posters in common employee areas (e.g. lunch rooms, water coolers, etc.)
- Emails
- 'Snail Mail' to an employee's home (especially helpful if dependents are eligible for access)
- Intranet
- Wellness Champions
- Bringing in a healthy lunch for staff and providing a high-level demo

Once the site is 'live', use the technology to communicate as well. In the CoreHealth platform, there are a variety of communications tools including message boards, emails, notifications, SMS (text) messaging and social collaboration tools – it's best if you can use a combination of formats.

6. Program Review

The system has been 'live' for a little while, what now? As mentioned already, this is just the beginning! This is where your vendor should help you review reports and provide engagement tips and suggestions for improvements.

You may also want to poll your users to see how things are going (depending on the technology, you should be able to do this from within the portal).

Depending on timing and the programs you are running, you should also revisit the benchmarks you identified in the ROI of Wellness Technology and compare to the current state. Are you seeing improvements in time savings and capabilities? Can you quantify the before/after state? If so, it's always good to document the results and share with your team (and your technology vendor as I'm sure they would love to do a [case study](#) on your results).

Keep communicating, learning and tweaking to continue evolving your programs and stay ahead of your competition.

7 Post Implementation

Your new platform is 'live' and now you can breathe (or so you hope). You've just invested weeks (or months) in the implementation process and may think you are done... but the simple truth is that **you are never truly done**. [Wellness technology has helped shape the wellness industry](#) and will continue do so in the years ahead.

Like all systems worth any value, *this is just the beginning*. Once you start feeling comfortable using the software, you will recognize the potential of implementing new processes, programs and ideas to continue to keep your competitive edge. **Technology isn't an investment that should go stagnant.**

It's at this stage when your wellness technology vendor really proves their continued value.

This means the vendor should:

- **Check in on a regular basis** to see how things are going (ideally your [account manager](#) will have the pulse on your account).
- Provide kick-butt **technical support** by a team of platform specialists that are responsive (not calling you days later), professional and ready and able to help you solve your issue promptly and to your complete satisfaction.
- Release **regular software updates** with new innovations, fixes and improvements. (Tip: if they aren't, that's a red flag.)

- Introduce you to **new tools and resources** that you may not otherwise be aware of. For example, CoreHealth is always growing our network of [third-party, best-in-class wellness vendors](#) to 'plug in' to our platform to fill any gaps and provide a seamless end-user experience.
- Guide you on [Wellness Portal Design Best Practices](#) and provide you with ongoing ideas and recommendations on how to **get the most of your platform**.
- Support you with **responding to proposals and RFPs** (if you are a wellness provider re-selling the platform) as they pertain to your technology (especially when you are a new user still learning).
- Present solutions to **help you grow your business**. For example, CoreHealth provides [extensive partner support](#) which includes complimentary external marketing reviews for our customer re-sellers and the referral of new leads to help you grow your client-base and ultimately your revenue.

The underlying message here is that this partnership should continue to grow and evolve to help you do better with the technology and your business so you can continue to focus on your strengths – delivering innovative and comprehensive wellness programs to clients that get results.

Technology shouldn't be a barrier – it should be the catalyst to greater things.

About the Authors

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About CoreHealth Technologies

CoreHealth Technologies Inc. is the leading corporate wellness platform trusted by wellness providers for more than 1000 organizations, ranging from medium-sized businesses to Fortune 500 enterprises. At CoreHealth, we believe that developing the best employee wellness programs is all about giving wellness companies the right code, design and access to the latest innovations. With the most customization, integrations and reliability of any software in its class, CoreHealth's powerful platform lets users focus on growing great companies. For more information, explore the [CoreHealth website](#).