The following checklist provides a framework to help you determine and prioritize your requirements during evaluations of corporate wellness vendors.

Edit as Required

|  |  |
| --- | --- |
| **Requirements Priority:**  1 - Critical  2 - Nice to Have  3 - Not Required | **Vendor Scoring:**  5 - Available Out of the Box OR Yes  4 - Configurable (no code changes)  3 - Custom Programming Required  2 - Via Third-Party Provider  1 - Not Supported |

| **Vendor Requirements** | **Priority 1 - 3** | **Vendor 1 Name**  (website) | **Vendor 2 Name**  (website) | **Vendor 3 Name**  (website) |
| --- | --- | --- | --- | --- |
| **Vendor Score** | **Vendor Score** | **Vendor Score** |
| **PART 1** |  |  |  |  |
| **Vendor Information** | | | | |
| Experienced in the health and wellness sector |  |  |  |  |
| Vendor has wellness technology experts (i.e., developers, programmers, etc.) |  |  |  |  |
| Existing customers served:   * Corporate Wellness Providers * Employers * Insurers & Group Benefit Brokers * HR Consulting Firms and EAP Providers |  |  |  |  |
| **Geared for Growth / Future-Proofed** | | | | |
| Platform is extendable / scalable to grow as you do |  |  |  |  |
| Ongoing software releases are provided |  |  |  |  |
| Portals are easily customizable as graphic styles change |  |  |  |  |
| Scalable data storage and web servers |  |  |  |  |
| **Third-Party Integrations** | | | | |
| Ability to seamlessly integrate to third-party systems (e.g., HRIS, EAP, health claims) and tools |  |  |  |  |
| Single Sign-On capability |  |  |  |  |
| Ability to integrate with devices and wearables |  |  |  |  |
| If existing integrations do not exist, is the provider *willing* to integrate? |  |  |  |  |
| **Security** | | | | |
| Fully Audited Data Center |  |  |  |  |
| Compliant with geographical privacy rules (e.g., HIPPA, PIPEDA, ISO 27001, etc.) |  |  |  |  |
| Choice of Canadian or US Data Center location |  |  |  |  |
| Role-based security allowing you to delegate permissions to other users including clients |  |  |  |  |
| Resilient production infrastructure with Recovery Point Objective of < 1 hour |  |  |  |  |
| **International Capabilities** | | | | |
| Platform is designed for localization including languages |  |  |  |  |
| Data storage in European Union (EU) adequate location |  |  |  |  |
| Support for metric measurements and conversions |  |  |  |  |
| Platform can be translated to: |  | | | |
| * French |  |  |  |  |
| * Spanish |  |  |  |  |
| * Chinese |  |  |  |  |
| * Other |  |  |  |  |
| **Customer Support** | | | | |
| Site Admin can troubleshoot and change passwords on their own |  |  |  |  |
| Responsive vendor support team (e.g., support team can solve most problems immediately or promptly) |  |  |  |  |
| Vendor-assigned account manager to support you and your team |  |  |  |  |
| **Pricing** | | | | |
| You feel you get good value for what you get. |  |  |  |  |
| Technical support is included in license fees. |  |  |  |  |
| **VENDOR REQUIREMENTS SUBTOTAL** |  | **/150** | **/150** | **/150** |
| **PART 2** |  |  |  |  |
| **All-in-One Platform Features** | | | | |
| One solution that includes:   * Health assessments (by vendor, a third-party, bring your own) * Biometric management * Wellness challenges (e.g. out-of-the-box, third-party, your own) * Communications (variety of options including text messages and push notifications) * Polls / Surveys / Questionnaires * Health Content / Education * Coaching management and optimization (i.e video coaching, self-directed, etc.) * Self-Help Programs * Incentives * Reporting / Dashboards * Responsive design / mobile app * The ability to tailor overall program or by locale * Features/functionality you can configure * Multilingual * Private & secure * Established network of third-party, best-in-class wellness vendors for you to pick and choose * Ability to integrate with third-party systems/tools with Single Sign-On (SSO) capability so users can login to one portal and access everything |  |  |  |  |
| **User Experience** | | | | |
| Portal is slick, fun, and engaging |  |  |  |  |
| Users can navigate the portal intuitively with minimal instructions or support |  |  |  |  |
| Includes gamification and competitions to engage users |  |  |  |  |
| Site Administrator has a central control panel to manage all features of the site in one view |  |  |  |  |
| **Mobile Friendly** | | | | |
| Responsive web designs - web portal can be easily viewed on any desktop, tablet or device |  |  |  |  |
| Native Mobile App available for use on any device (e.g. iPhone, iPad, Android, etc.) |  |  |  |  |
| Mobile configurable |  |  |  |  |
| **Communication / Social Engagement** | | | | |
| Variety of communications methods (e.g. group chats, video chat, buddy chats, emails, push notifications, text, etc.) |  |  |  |  |
| Group Lists |  |  |  |  |
| Users Testimonials (e.g. users post successes) |  |  |  |  |
| Integration capabilities for social media platforms |  |  |  |  |
| **Personalization / Customization** | | | | |
| Brand home page to include corporate colors and logos |  |  |  |  |
| Tailor home page – *you* choose components to appear on home page (e.g. add/delete widgets or features) |  |  |  |  |
| Personalized, localized, risk-based driven content (e.g. participant is high risk for diabetes, they will receive relevant diabetes content) |  |  |  |  |
| Secure message center |  |  |  |  |
| Health tips you can configure |  |  |  |  |
| Distributes weekly progress reports to users |  |  |  |  |
| Ability to send bulk emails to: |  | | | |
| * Individual users |  |  |  |  |
| * Select users |  |  |  |  |
| * All users |  |  |  |  |
| Ability to schedule communications in the future |  |  |  |  |
| **Overall Configurability** | | | | |
| Configurable – changes can be made by *your* Site Administrator (e.g. dashboards) vs. vendor/programmer |  |  |  |  |
| Configurable user profile/registration page by location |  |  |  |  |
| Ability to add custom end user license agreements (EULA) and acceptance forms |  |  |  |  |
| Ability to create custom survey and polling |  |  |  |  |
| Access to all data including reporting and query tools |  |  |  |  |
| Full API capabilities with access to write custom: |  | | | |
| * CSS |  |  |  |  |
| * HTML |  |  |  |  |
| * Javascript |  |  |  |  |
| **Reporting / Dashboards** | | | | |
| Out-of-the-box reports available |  |  |  |  |
| Reports can be configured by Site Admin (vs. just vendor) |  |  |  |  |
| Graphical dashboards (e.g. pie charts, graphics) |  |  |  |  |
| Dashboards for your executives to get a ‘pulse’ of employee health |  |  |  |  |
| Business Intelligence (BI) dashboards |
| **Health Assessments** | | | | |
| Use out-of-the-box health assessment you can edit |  |  |  |  |
| Use your own health assessment |  |  |  |  |
| Integrate with third-party health assessment |  |  |  |  |
| **Challenges & Engagement** | | | | |
| Out-of-the box challenge templates covering various topics (e.g. food, sleep, activity, water, etc.) |  |  |  |  |
| Personal Challenges – users can challenge themselves at anytime |  |  |  |  |
| Group Challenges – users can ‘challenge’ a select group of individuals (to compete and motivate each other) |  |  |  |  |
| Team Challenges – numerous users on a team. |  |  |  |  |
| Gamification: Virtual treasure hunts, secret pop-ups, Leaderboards, Message Boards, Badges |  |  |  |  |
| Ability for Site Admin (vendor not required) to create and implement new challenges |  |  |  |  |
| Ability for Site Admin (vendor not required) to edit out-of-the-box challenge templates |  |  |  |  |
| **Data Uploads** | | | | |
| Data uploads into platform via XLS |  |  |  |  |
| **Goals and Trackers** | | | | |
| Goals can be personalized |  |  |  |  |
| Tracking of any type of activity (e.g. running, canoeing, boxing, food groups) |  |  |  |  |
| Map tracking (e.g. running routes) |  |  |  |  |
| Integration with devices (e.g. FitBit, Apple Health) |  |  |  |  |
| Journal/ food diary |  |  |  |  |
| **Incentives** | | | | |
| Configurable incentive system *you* can tailor |  |  |  |  |
| Reward for any action on the platform and 3rd party via upload |  |  |  |  |
| Multiple incentive programs can run concurrently |  |  |  |  |
| Progress can represent point, dollars or whatever incentive you may be using |  |  |  |  |
| Supported for participation-based incentives (e.g. if you participate, you are rewarded) |  |  |  |  |
| Supported for outcomes-based incentives (e.g. if you achieve your goal, you are rewarded) |  |  |  |  |
| **Scheduling** | | | | |
| Ability to schedule biometrics, coaching & on-site events |  |  |  |  |
| Ability to track and reward attendance (e.g. lunch and learns) |  |  |  |  |
| **Coaching & Education** | | | | |
| Custom education campaigns and self-learning programs |  |  |  |  |
| Ability to create: |  | | | |
| * Online group coaching programs |  |  |  |  |
| * Digital coaching programs |  |  |  |  |
| * One-on-one/telephonic coaching programs |  |  |  |  |
| * Coach management and optimization tools |  |  |  |  |
| * Video coaching |  |  |  |  |
| Secure coach/client communication tools |  |  |  |  |
| **International Capabilities** | | | | |
| Platform is designed for localization including languages |  |  |  |  |
| Data storage in European Union (EU) adequate location |  |  |  |  |
| Custom reports available by vendor (as required) |  |  |  |  |
| **FUNCTIONAL REQUIREMENTS SUB-TOTAL** |  | **/340** | **/340** | **/340** |
| **TOTAL** |  | **/490** | **/490** | **/490** |