



Toolkit for Researching & Evaluating Wellness Technology Vendors



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The Process to Find the Perfect Wellness Portal

Making the decision to switch wellness technology is no easy task. Many different needs and requirements need to be taken into consideration so that when it comes time to make a final decision you feel confident choosing your new technology partner. To help you along the journey, here is the general process to follow when going to market to find new software.

- **Understand High-Level Project Objective** – Understand, at a high-level, what problem and/or challenges your organization wants to overcome with this new wellness technology. Sometimes, it is a leader (sponsor) that tells you (the project manager, program administrator, etc.) what the overarching problem is. Typically, the process starts from a pain point.
- **Determine 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.
- **Needs Assessment** – Ideally you (and/or your project team) meet with every key person in your organization that can act as representatives of important stakeholders (e.g., end-users, site administrators, decision makers, etc.) to understand and develop the business case (what problem are you trying to solve? Dig deep into pain points and expectations).



This phase is quite time consuming and in-depth. It is recommended that you review existing processes and procedures, then ask as many questions as you can and document everything. This phase helps you formulate your functional requirements, priorities, and your project objectives.

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

Is an RFP template too much? Check out the [Technology Requirements Checklist](#).

- **Vendor Research** – There are many wellness portal vendors on the market (check out [9 Sites to Help Corporate Wellness Companies Find a New Wellness Portal](#)). You can start to filter out non-suitable vendors quickly if you have identified your requirements and priorities clearly in the previous step.

It's also important to understand [how a wellness technology company is different than a corporate health vendor](#) to help you clarify if you are just looking for technology or seeking wellness services too.

You may even want to develop a pre-qualification checklist (use high priority requirements from the [RFP template](#) for pre-qualification) to help you pre-screen vendors and narrow the list of possible vendors down to 3–5 candidates.

- **Vendor Evaluation** – Some organizations follow a formal RFP process (this in-depth [RFP template](#) can be a huge help) or you can simply use it as a guide to find the answers from your discussions with vendors (e.g. where you update the answers and comments within the document). If you are a smaller organization, using the RFP template as your guide is likely your best bet as not all vendors will invest the time to submit a formal response.

Regardless, if you use this RFP template or another process, *the most important thing is that you write your project goals and functional requirements down and prioritize* – everyone on the project team should be included in this process.

- **Vendor Demos** – Whether you follow a formal or informal evaluation process, seeing a vendor demonstrate their wellness portal is an important stage.

It is important to provide vendors with a demo flow “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.

- **During-Demo Evaluation** – Ideally, your entire project team should attend all vendor demos; otherwise, it can be difficult for everyone to get a good feel for each vendor’s strengths and weaknesses. Plus, if everyone attends, the debrief discussions will be more valuable and productive which will help you make a final decision.



If each evaluator completes a scorecard for each vendor *during* the vendor demo, their evaluation will be more timely, accurate and relevant than trying to remember which vendor showed what and why they were better than another.

This sample [Evaluator Scorecard](#) can be edited and distributed to each evaluator participating in vendor demos.

- **Internal Debrief** – After all vendor demos are complete, all evaluators should reconvene:
 - For a final meeting to review and discuss the merits and pros and cons of each vendor.

- To evaluate the scorecards completed in the previous stage (ideally the project manager will have summarized the scorecards and any other pertinent notes/information for easy review).
- For a courteous 'debate'. It is important to discuss all points and concerns as you don't want those to be stumbling points for the project going forward.

This can be an organic process or very structured – you know your team and what will work best.

- **Vendor Short List** – During the debrief process, you sometimes determine a clear winner but sometimes it is not so clear. It is important that everyone has their say and you clearly document the pros and cons of each. Ideally, you identify two vendors:
 - your top choice, and
 - a runner-up (in the event reference discussions or the contracting phase raises any concerns).

At this stage, you may require one more or several 'deeper dive' demos to delve into the details of what you want, what can/cannot be done and to establish a mutual understanding of project scope and expectations. This is often where the vendor starts to formulate a firm price based on project scope, timelines, and priorities.

- **Vendor Reference Checks** – It is 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.

The [RFP template](#) includes a section for the vendor to identify 3 references. If your process was informal with no RFP, it is still important to check references. References will help you confirm your decision OR raise other questions that you may wish to get clarification on before making a final decision.

- **Decision & Contract** – It's been a long process, but you are almost there! After debriefing meetings, 'deep dive' demos, and reference checks it's time to make your final decision.

About CoreHealth Technologies

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