

RFP TOOLKIT

5 things to do before issuing an RFP





Prior to Submission

Prior to submitting requests for proposals (RFPs) to potential vendors, there's work to be done internally to prepare yourself and your organisation.

The first, and arguably most important step, is to consider whether you really need to go through the RFP process. It can be costly and time-consuming, so take the time to decide whether a formal process is necessary. Once you've made the decision to move forward, you must ready your own organisation before you can begin the process of analysing worthy wellbeing platform vendors. Top-down support from leadership and key stakeholders is critical at this stage. It will set your wellbeing programme up for success by driving participation and engagement and accelerating healthy behaviours across the organisation.

Assess your readiness

Introducing a health and wellbeing solution is a critical decision that directly impacts the success of your organisation and the welfare of your employees. It can dramatically influence productivity, culture and loyalty. How can you prepare your organisation so you're ready when it comes time for implementation?

During the RFP process, the better you understand your organisation, the better able you are to not only assess the vendor best suited for your current needs, but the solution that will mature alongside your organisation.

Prior to submission:

- Where is your organisation today on the wellbeing spectrum?
- How will your employees adapt and respond to this initiative?
- What potential pain points and barriers exist?
- What are your goals for this initiative?



Create a budget

Understanding the costs associated with your employee wellbeing investment is essential. Considerable time and energy is spent on implementation, training, onboarding and rollout. Creating a budget upfront keeps costs in line and helps you focus on building a successful programme that meets the unique needs of your workforce.

Beyond initial setup costs, outline your budgetary needs to align with your overall wellbeing strategy, mission and vision. Your goal is to improve the wellbeing of your employees on a holistic level, not to simply influence limited areas of wellness. Ensure your financial resources reflect the depth and breadth of the solution you seek.

Budget Line Items to Include:

- Incentives
- Technology requirements
- Staff
- Onboarding and training
- Champion support
- Implementation



Establish a core team

Organisations with senior level commitment to building strong cultures of wellbeing have healthier employees and better work environments. As key members of your core team, it's critical that your C-suite not only stand behind your wellbeing programme, but also push it forward. Getting them involved early will keep them invested and engaged in the process to help you drive results as you build a culture of health.

Your core team is vital to successful implementation, integration and rollout. As you dive deeper into the vendor selection process, bringing together diverse stakeholder groups and leaders streamlines your evaluation and vendor assessment. These core team members will continue to be vital to ongoing program success, helping to drive participation and engagement and serving as wellbeing champions.

Recommended core team members include leaders from these functional areas:

- Human Resources
- Finance
- Information Technology
- Security • Marketing
- Executive Leadership
- Customer or Employee Experience



Prepare to communicate

Once your core team of decision makers is on board, keep them invested by proactively involving them in key milestones. Develop a consistent communication plan that outlines internal messaging, next steps and timelines to ensure your core team is knowledgeable and able to keep their respective teams updated. If possible, bring the team together to make important programme decisions that impact your employees' interests. Building momentum with your core team early on will pay dividends when you're ready to launch the programme company wide.

An initial communication plan should include:

- Key goals
- Timeline
- Internal messaging
- Team meetings
- Launch sequence
- Champion resources
- Ongoing programme
- Communications



Understand your needs

Your ultimate goal is to develop a wellbeing programme that best serves the needs of your workforce.

To help determine the best wellbeing platform vendor to support you in achieving that goal, conduct a needs assessment for your organisation. Define not only the must-have requirements but the nice-to-have components. The more that vendors understand your wants and needs up front, the better equipped they will be to deliver the right solution for your organisation and worker populations. This starts with understanding and assessing your own goals and requirements before requesting a proposal.

Programme requirements to consider:

- Proven engagement
- Gamification
- Mobile-first design
- Flexible incentives
- Real-time analytics
- Global capabilities
- Personalisation
- Health stations and devices
- Social challenges
- Condition management programming



You may not have all the answers today.

So, to help you get started, we've created a [buyer's guide](#) that will help you explore your options and navigate the RFP process with ease.

Ready to take your employee wellbeing programme to the next level?
Talk to an expert at Personify Health to get started.

Contact us

Learn more at personifyhealth.com
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The logo for Personify Health, featuring a stylized lowercase 'p' with a tilde-like symbol, followed by the word 'personify' in a bold, sans-serif font, and the word 'HEALTH' in a smaller, all-caps, sans-serif font below it.