Sample RFP Questionnaire

General Information

1. Provide a brief history of the services your company provides, specifically as it relates to managing.

2. Briefly describe your organisation's philosophy regarding wellbeing programmes.

3. How long has your company been providing health and wellbeing programmes for organisations?

4. What percentage of your annual revenue is generated from your wellbeing programmes?

5. List awards that your programmes has received.

Experience

1. How many employers/organisations/health plans do you currently provide a wellbeing programme for?

2. Please provide five references that have been clients for at least two years of similar size and/or vertical market.

3. How do you incorporate diversity, equity and inclusion?

4. What types of organisations do you work with?

5. What is your target client size?

6. What support and resources are available for programme administrators or Champions to engage its members?

Wellbeing philosophy

1. Describe how your company differentiates itself and its products within the wellbeing programme marketplace.

2. How is lifestyle/behaviour change embedded into your product offering?

3. How does your programme support total employee wellbeing (physical, social, mental, etc.)?

4. Does your programme allow for family members and friends to participate for free?

5. What social capabilities are available for our employees only?

6. How does your wellbeing programme model benefit an organisation?

7. How does your wellbeing programme model benefit employees or members?

8. How do you engage diverse employee groups?

Health Assessment

1. Do you offer a health assessment?

2. Is your health assessment proprietary?

3. Is your health assessment certified?

Engagement

1. How do you define "engagement" versus "participation"?

2. How many times each day, each week, and each month do your members engage with your platform and share participation and performance data?

3. Once the member is engaged in the programme, how do you sustain their engagement?

4. What mechanisms do you have for rewarding onsite activities or behaviour online (e.g., attending on-site classes, flu clinics)?

5. Can you track activity without using a device?

Personalisation and integration

1. Describe how you promote programmes to employees and members based on their individual goals, interests and health profiles.

2. Do you utilise artificial intelligence or machine learning to inform recommendations?

3. Outline your approach, and the constraints, to integrating existing data from our third-party systems and vendors with your platform.

4. Are you able to recommend third-party services to my employees through your platform?

5. Does your programme integrate with online and mobile app health/activity trackers?

6. What programmes and partners do you have directly integrated into your platform?

7. What types of data sources are integrated into your platform?

Challenges and competitions

1. Are your challenges team-based or individual-based?

2. How do you engage, motivate, and communicate with participants during a challenge?

3. What challenges do you offer aside from 'steps' or physical activity challenges?

4. Can individuals set up their own challenges?

5. Can wellbeing Champions set up challenges?

6. What social components are included within your challenge platform?

7. Can you create and implement custom challenges?

Global reach

1. Does your company offer a global/international solution? Please explain.

2. Describe your experience working with multinational companies.

3. What are some specific methods used to engage a global workforce?

4. Are your materials culturally sensitive and relevant to serve diverse global workforces?

5. In what languages is your platform available?

6. In what countries do you have offices to serve local workforces?

7. In what languages can you provide technical support?

Biometric screening

1. Describe the methods available to collect biometric information.

2. What options are available to those who cannot attend an onsite screening?

3. Outside of biometric screenings, what tools do you offer for participants to take verified biometric readings?

4. What recommendations do you have for screening new hires?

5. What options are there for members to register for a screening?

6. Can members self-report biometric data?

Customer service

1. Do you have an in-house customer service center to support your participants?

2. Describe the customer service support provided before, during, and after enrolment.

3. How do you handle customer service staffing during initial enrolment, annual enrolment, and other peak times?

4. Describe the training provided to your customer service representatives.

5. How do you evaluate the quality of the customer service interaction?

6. Is your customer service available via chat?

7. What is your member satisfaction rating and how is it calculated?

Communications

1. Describe your communication strategy to notify and engage employees about your wellbeing programme:
   • Prior to implementation
   • During implementation
   • Periodically
   • Annually

2. Please describe the in-house team that manages communications.

3. Can communication materials be customised for the participant?

4. How do you provide communications to those who are primarily off-site or remote?

5. Please describe options for white-labeling

Analytics and reporting

1. Describe the reporting available to participants.

2. Describe the reporting available to clients.

3. Do you provide quarterly, bi-annual, or annual reports that identify, among other things, utilisation trends, benchmarks, recommended actions for the customer to pursue, etc.?

4. Describe your ability to provide reports illustrating the positive health impacts of the programme.

5. Can you report on a defined employee segment within the company? (e.g., business department, location, or other identifiable areas).

6. Are reports available on demand? If so, which data points can be identified and how granular can reporting be reviewed?

7. Describe your ROI / VOI approach and methodology.

Account management

1. Will an account manager who has day-to-day account responsibilities be assigned to our account?

2. Describe your account management structure.

3. What changes in the account management structure or personnel occur as we move from programme implementation to ongoing support?

4. How do you measure satisfaction with your account team?

Technology

1. Is your software development team completely in- house?

2. Indicate your data privacy and security certifications that you have achieved.

3. Do you have an activity device that is directly integrated into your programme?

4. What other devices does your programme support or integrate with?

5. Do you offer a mobile app for employees who work remotely or don't have access to a dedicated workstation?

6. What features of your website are available on mobile applications?

7. What accommodations are made for those with visual and/or other impairments and disabilities?

8. What capabilities do you offer to assist members with receiving preventive care and/or closing care gaps?

9. How do you blend your digital and live support services for members?

10. Do you incorporate machine learning or artificial intelligence into your platform? If so how is this used?