

RFP Toolkit

Technical evaluation grading worksheet

A whole-person health and wellbeing solution impacts organisations through inclusive programming across an expansive range of needs, including physical, mental, social, emotional, conditions, financial and community impact. Holistic wellbeing drives critical business outcomes and organisational success, from workplace performance and productivity to individual engagement and culture. Use this evaluation sheet to

identify health and wellbeing vendors and solutions that best meet your organisation's goals and requirements. Based on the results provided from the RFP sample questionnaire, compare vendors' technical capabilities side-by-side. Indicate the most robust vendor per category by giving a score of "1". Tally up the scores after completing the worksheet to determine your best health and wellbeing solution.



Capability	Features	Personify Health	Co. ABC	Co. XYZ
Experience	High percentage of business encompassing wellbeing services to employers			
	High percentage of daily, weekly, monthly engagement			
Wellbeing Philosophy	Highly personalised, and interactive user experience, both online and through mobile app			
	Customisable interface and platform reflecting employer branding as well as client-specific programmes and resources			
	Ability to serve as a hub to promote and connect client and third-party programmes			
	Ability to include spouses, partners, and friends in programme			
	Variety of activity tracking device integrations			
	Variety of individual, team-based, and custom challenges			
	Ability for platform to expand with evolving business goals			
	Ability to support total employee wellbeing (physical, emotional, social, mental, financial wellbeing, etc.)			
Health Assessment	Streamlined, visually engaging, userfriendly health assessment			
	Available via online portal, mobile app, and hardcopy			
	Members can take the assessment multiple times to see progress on key health factors			
Biometric Screenings	Integrates data from multiple sources			
	Conducts onsite screenings and/or integrates with screening vendor			
Global Reach	Variety of incentive and fulfillment options available to global members			
	Number of global clients			
	Number of languages supported through programme, such as communications, HRA, portal, and support			
	Cultural sensitivity and relevance as well as appropriate localisation and translation			
Communications	Robust engagement strategy with supporting communications			
	Customisable suite of communication and marketing materials			
	Variety of channels (e-mail, web, mobile app, push notifications, offline)			
	Ability to customise/brand the user experience and access to real-time data and metrics			

Capability	Features	Personify Health	Co. ABC	Co. XYZ
Reporting and Analytics	Robust standard and ad-hoc reporting capabilities			
	On-demand access to real-time data and metrics			
	ROI/VOI analysis			
Customer Service	Multimodal customer service experience			
	Support available before, during and after enrollment			
	Coverage across multiple timezones			
	Comprehensive training and evaluation of customer service staff			
Account Management	Experienced, cross-functional account management			
	Customer support throughout life of the contract			
	Proactive and collaborative approach to optimise programme participation, engagement and performance			
Technical Capabilities	Mobile-first development philosophy to engage users on-the-go			
	Cloud-based infrastructure to ensure scalability and meet growing customer base			
	Modern technology stack			
	Security requirements/standards			
	Data privacy standards			
Integration and Hub Capabilities	Ability to integrate with complementary third-party tools, apps and systems			
	Ability to target information and programmes to appropriate audiences			
	Self-service administrator capabilities			
	Flexible calendaring for distributed HR teams			

Time for the results.

Based on your evaluation, the strongest wellbeing platform solution and best fit for your organisation's needs is the vendor with the highest score total:

Tally Score

Personify Health	Co. ABC	Co. XYZ