



Practical guide

5 steps to strengthen your digital health & wellbeing vendor evaluation

25 technical questions to ask. Plus, decision worksheet included!



The digital health marketplace is crowded, fast-moving, and full of vendors who sound the same at first glance.

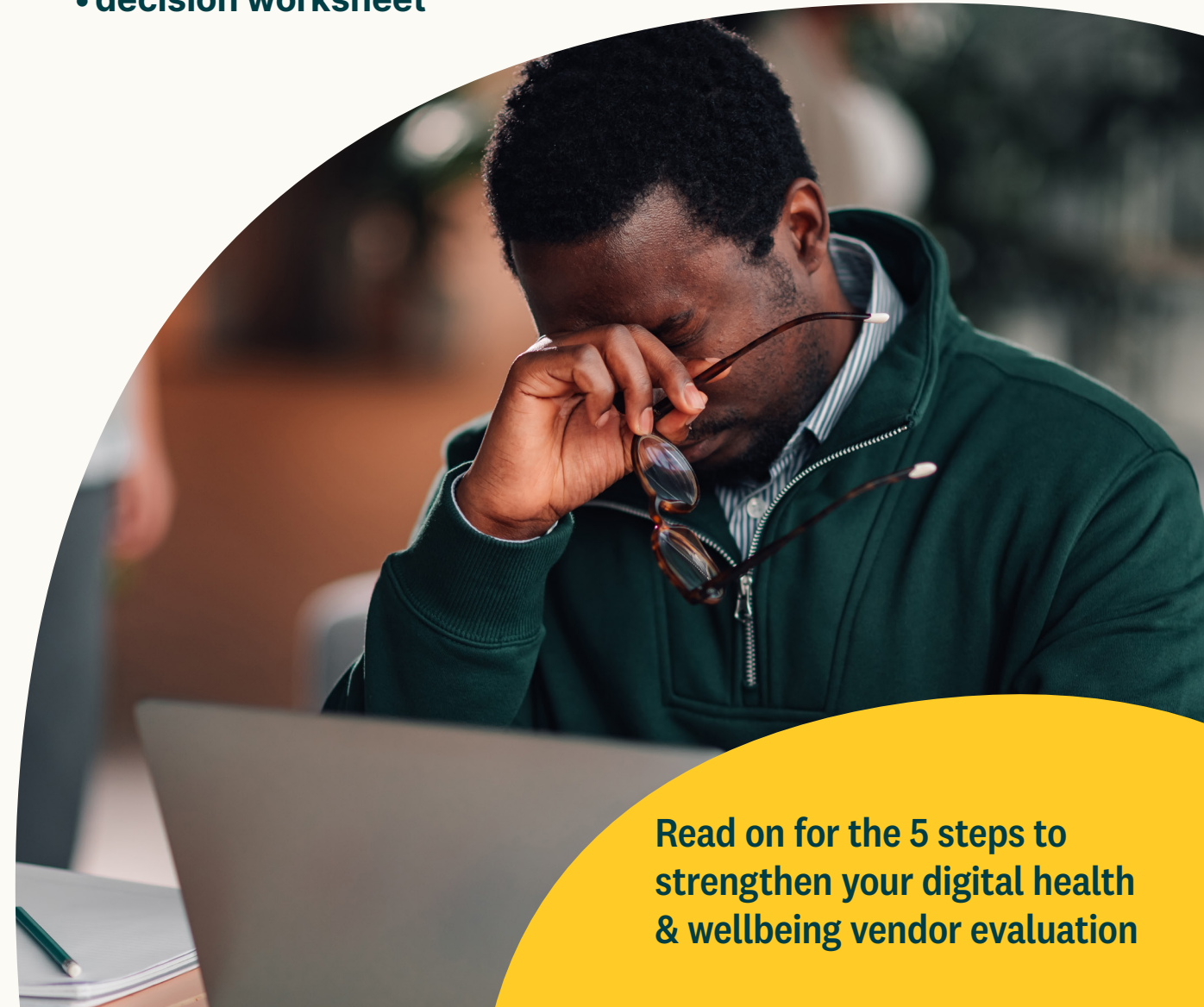
We hear your frustrations and confusion, and we're here to help guide you.

Employers are under pressure to make confident decisions, prove value, and deliver a better experience for their people — all while managing budgets, rising healthcare costs, systems, and a benefits strategy that has to work across diverse populations.

This practical guide is built for employer leaders, HR and Benefits teams, Finance partners, and anyone responsible for selecting, evaluating, and managing digital health and wellbeing solutions. It gives you a clear starting point, a structured way to evaluate providers, and give you reassurance in choosing who can support healthier people and healthier businesses — not just talk about it.

Choose a digital health vendor aligned to your strategy, your workforce needs, and your long-term goals by using our:

- **practical steps**
- **targeted questions**
- **decision worksheet**



Read on for the 5 steps to strengthen your digital health & wellbeing vendor evaluation

01

Name the real problems you need to solve

Teams move faster when they agree on the core challenges.

Employee engagement, care gaps, inclusive support, simpler benefits navigation, clear outcomes — whatever your priorities are, define them early and directly.

What to do:

- ✔ Identify the top 2–3 problems you need to address
- ✔ Rank them by importance and use those rankings to guide every vendor conversation

Clear priorities help you distinguish valuable solutions from surface-level features. They also ensure every stakeholder evaluates options from the same starting point.



02

Assemble a decision-making team with authority

Choosing a digital health platform is a decision for HR/Benefits, Finance, IT/Security, Communications, and leadership – to name a few.

The right voices shape better decisions and prevent late-stage surprises.

What to do:

- ✔ Select an executive sponsor, a day-to-day or overall owner/Lead, and IT/Security partners early
- ✔ Keep the group focused and empowered to make decisions

Solutions gain momentum when adoption, integration, and ownership are planned from the start. A clear decision group keeps evaluation and implementation moving.



03

Define what “good” looks like for your organization

Success becomes easier to measure when the criteria is explicit.

Set expectations for the experience you want for your employees, the integrations (think EAPs and other health issue-specific solutions) you can support, and the outcomes you expect to see in the first 90–180 days and beyond.

What to do:

- ✔ Separate must-haves from nice-to-haves
- ✔ Document required integrations, data sources, and security needs
- ✔ Build a shortlist of success criteria that aligns with stakeholders’ expectations

Evaluations must stay focused on value. And when the criteria is clear, teams reach consensus faster, and vendors can demonstrate how well they meet your goals.



04

Build a budget & plan that supports real adoption

Platform fees are one part of the investment. Success depends on internal engagement and promotion – the communications, incentives, champions, and training that help people use – and love

What to do:

- ✔ Include activation resources in your budget - think onsite launch stand, bunting, giveaways motivational communications, challenge emails etc
- ✔ Align on what your workforce needs for strong awareness and sustained participation. Participation from leadership is crucial in motivating others and maximizing success.

Technology succeeds when people actually use it. Driving engagement supports your investment and accelerates impact.

When employees truly engage with their health benefits, they experience:

3x

higher likelihood of acting preventively

20%

fewer avoidable ER visits

17%

fewer inpatient admissions

05

Pressure test your shortlist with real conversations

Written responses help you narrow the field. Live discussions help you understand how a partner thinks and collaborates.

What to do:

- ✔ Request tailored demos and scenario-based working sessions
- ✔ Ask follow-up questions tied directly to your priorities and challenges

Real conversations reveal problem-solving depth, partnership style, and long-term fit. They show you how each partner supports your strategy when it matters most.



25 questions to confidently choose a digital health & wellbeing vendor

These questions help you see how each vendor engages your workforce, connects your ecosystem, and supports meaningful outcomes.

Use them in research, live conversations, RFPs, or working sessions.



Company & philosophy

1. How would you describe your wellbeing philosophy and what guides program design?
2. What experience do you have supporting employers like us?
3. How do you approach building and governing a partner ecosystem?

Program model & experience

4. How do you support whole-person health in an integrated way?
5. How do you avoid fragmentation in multivendor environments?
6. How do you support employers modernizing or consolidating programs?

Administrator enablement

7. How do administrators tailor experiences across populations?
8. How do admins use insights to optimize programs over time?
9. How are DEI and accessibility embedded into admin tools?

Engagement & personalization

10. How do you define engagement vs. participation?
11. How does personalization adapt over time?
12. How do you surface relevant resources without overwhelming members?
13. How do you support diverse populations meaningfully?

Health insights & care gaps

14. How do assessments and insights drive personalized action?
15. How are gaps in care identified and addressed?
16. How do you incorporate social or contextual factors responsibly?

Outcomes & proof

17. What outcomes do employers typically aim to achieve?
18. What results have you delivered for similar employers?
19. How do you demonstrate value beyond year one?
20. How do outcomes translate into action for different stakeholders?

Partnership & evolution

21. How does account support evolve over time?
22. How do you address underperformance?
23. How do employers influence your roadmap?
24. How do you use AI responsibly alongside human support?
25. How do you balance innovation with stability and trust?



The digital health market is crowded, and employers deserve clarity.

The decision worksheet: Turn vendor answers into a clear winner

A wholeperson health and wellbeing solution should support physical, mental, social, emotional, financial, and community needs — and it should help your business strengthen performance, productivity, engagement, and culture.

How to use this worksheet

- Compare vendors' capabilities side-by-side
- Assign a score for each category using the guidance below
- Tally scores to reveal your strongest partner
- Capture notes that help you justify decisions to leadership and stakeholders

*Scoring guidance (1–5)

5 — Clear, confident, outcome-driven; shows maturity and alignment

3 — Meets requirements but lacks depth or differentiation

1 — Vague, feature-focused, or heavily caveated

Category	Score (1-5)*	Notes		
		Personify Health	Vendor 2	Vendor 3
Wellbeing philosophy & employer fit				
Whole-person, integrated experience				
Administrator enablement				
Engagement quality				
Personalization & inclusion				
Care insights & gap closure				
Outcomes & proof				
Account partnership strength				
Innovation discipline				
Overall Recommendation		<input type="checkbox"/> Strong fit <input type="checkbox"/> Not a fit <input type="checkbox"/> Partial fit	<input type="checkbox"/> Strong fit <input type="checkbox"/> Not a fit <input type="checkbox"/> Partial fit	<input type="checkbox"/> Strong fit <input type="checkbox"/> Not a fit <input type="checkbox"/> Partial fit

So, what next?

Choosing the right digital health partner has a direct impact on your people, your culture, your costs, and your long-term strategy.

Book a demo with Personify Health

Let's explore how a personalized, connected, wholeperson platform can create measurable impact across your organization.

Let's talk →

"The financial impact has been undeniable – saving us millions and adding real value to our enterprise. It's a solution that not only works, but empowers us to think differently about healthcare." – Todd Torvinen, CFO, ZMC Hotels

Why clients – and members – love Personify Health

78%

of members increased their physical activity

51%

average member engagement rate

20%

fewer avoidable ER visits

\$4.8M

average cost savings

About Personify Health

By bringing industry-leading third-party administration, holistic wellbeing, and navigation solutions together, all in one place, we have created the industry's first and only personalized health platform.

With decades of experience and global operations, we empower diverse and unique businesses – and diverse and unique people – to engage more deeply in health at a lower cost. Through our proprietary combination of data-driven personalization, science-backed methodology, and concierge-level clinical expertise, our end-to-end platform makes it easier to proactively address people's needs across their lives. With a personalized, holistic, and powerfully simple experience, we are redefining industry expectations and what it means to manage health.

Let's talk →

Learn how personifyhealth.com

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