

# WELL-BEING Practitioner

**Plus**

**WELLNESS PROGRAMMING GETS PERSONAL AT CLEVELAND'S CASE WESTERN RESERVE UNIVERSITY**

Mary Ann Dobbins and Elizabeth Click

**ARE YOUR MESSAGES UNDERMINING MOTIVATION?**

**WELLNESS LEADERSHIP SKILLS FOR FRACTIOUS TIMES**

**IMPROVE PARTICIPATION AND OUTCOMES WITH NEXT-GENERATION MARKETING**

# INSIDE...



**2**  
Don't Hire a Wellness Vendor Until You've Answered These Questions

**4**  
Are Your Messages Undermining Motivation?

**5**  
Saying Goodbye to Debbie Downer

**6**  
It's Okay to Have Low Participation. Really.

**7**  
Wellness Leadership Skills for Fractious Times



**8**  
Wellness Programming Gets Personal at Cleveland's Case Western Reserve University



**11**  
Inspired Messages



**12**  
Improve Participation and Outcomes With Next-Generation Marketing

**14**  
The Power of Open-Ended Questions in Wellness Program Evaluation



**15**  
Summer School



## DON'T HIRE A WELLNESS VENDOR UNTIL YOU'VE ANSWERED THESE QUESTIONS

Ever had a less-than-ideal wellness vendor experience? If you don't get what you bargained for, they probably misrepresented themselves (read *I Don't Believe Anything a Wellness Vendor Says...*) or you didn't do your homework — or both. Before you even start shopping, take some time to answer these 5 questions, then scrutinize each vendor carefully before making your decision.

**Is the service this vendor offers something our population wants?**

Surprisingly, this is a question that seldom gets asked. At least not in a way that produces meaningful feedback. If you ask people if they'd like this or that and it's a neutral to positive-sounding benefit, of course they're going to say yes. Gift cards for participation? You bet. Cash incentives for completing XYZ? I'll take that. Onsite fitness center? Where do I sign up? But if you ask an open-ended question like *What tools or services can we provide that would help you enhance well-being?*, it's unlikely any of those 3 float to the top.

**BY DEAN WITHERSPOON**  
CEO and Founder, HES



**INSIGHT**



## Is spending money on this vendor getting us closer to the organization's well-being goals?

Duh. We wouldn't be looking at them if we didn't think so. Maybe. But we've worked with enough groups to know that somewhere along the way a checklist mentality took root in the organization and if they're ticking the boxes they're "doing" wellness. A clear example is annual screenings. Many employers do screenings as a matter of course without regard to US Preventive Services Task Force or other guidelines. It's an unnecessary expense at the least and potentially a net negative.

## How will I know in a year, 2 years, or longer if the investment in this firm is successful?

Beginning with the end (or at least milestones) in mind can help you make smarter vendor investment decisions today. Be very cautious about ROI/VOI projections and risk reduction promises, particularly in the absence of third-party validation. But what will participation look like? Engagement? Satisfaction? Determine what's really important in advance and set your evaluation criteria first to measure success later.

## Is the delivery team as strong as the sales team?

It happens every week in wellness: contracts worth hundreds of thousands awarded based on RFI responses and a single pitch in the conference room. At HES we've won — and lost — our share of business this way and it always makes us scratch our heads. Did they even talk to references? Did they ask to interview the folks who will actually provide the service? Did they ask to talk to former and current clients? Did they request proof of vendor success claims? The sales team is *not* who's coming to work with you.

## Are we ready to help this vendor be successful at ABC company?

Some buyers expect vendors to come in with magic pixie dust and sprinkle it on the population to get the results

they want with little time or effort on their part. A service provider's success — whether they come onsite or do their work remotely — is always dependent on the purchaser's preparation. (HINT: If the vendor claims to have magic pixie dust you may want to keep looking.) An experienced vendor will have detailed implementation plans that outline the vital role of the buyer organization, which becomes a jumping off point for how to work together for greatest impact. If you're not prepared to roll up your sleeves and go to work with the provider, you're not ready.


Here are some more of our favorite vetting questions to help you choose the best fit for your population and program:

1. Are we clear about what we want the vendor to do?
2. What evidence can the vendor provide to support their success claims? Satisfaction figures? Customer service measures?
3. Can we visit the vendor's office during the selection process (site visit)?
4. How much hand-holding will the vendor need? Do we have the resources to manage them?
5. Does the vendor's material, including website, project an appreciation of communications and branding? Substance or fluff?
6. Do they offer top-quality free content on their website to help clients make the most of their products/services and address common well-being management issues?
7. Do their website's blog posts, white papers, SlideShares, etc. reflect a good grasp of current industry issues and related scientific research as well as high insight about challenges/problems facing clients like us?
8. What are the vendor's values, and how are they demonstrated?

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## "Are we clear about what we want the vendor to do?"

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9. What kind of well-being program does the vendor have for their own employees?
10. Are we seeking a vendor to act in a consulting role? If so, how can a vendor demonstrate they're able to do so and that their advice/recommendations are of value?
11. What are we looking for in an account manager? (Always have the anticipated account manager attend the finalist presentation.)
12. Do we want the vendor to partner on conference presentations, articles, webcasts? Is the vendor situated to support this?
13. Who is the vendor's on-staff well-being expert(s)? What are their qualifications?
14. If a vendor boasts an advisory board of well known professionals, what are examples of how board members influence the company?
15. What evidence is there that the chosen vendor will work well with our other vendors (and with us)?
16. What Service Level Guarantees are most important to us? Will they customize their SLGs to accommodate our priorities?
17. What level of detail do we want the vendor to provide in terms of reporting? Examples? Customization?
18. What are their customer service goals? How do they measure them?
19. What past clients have fired the vendor and why?
20. How financially solvent is the vendor? 





# ARE YOUR MESSAGES UNDERMINING MOTIVATION?

Inspiring people to take action toward lasting well-being is our collective aim as wellness pros. But sometimes what we — or our participants — think is motivating has the opposite effect.

With careful attention to reading between the lines and avoiding unintended consequences, you can craft messages that truly motivate while cultivating a mindset that supports sustainable change. In words, images, and examples deliberately promote:

- A healthy relationship with food, exercise, and other well-being behaviors
- Positive body image
- Attitudes of non-judgment, self-compassion, and empowerment.

## ENHANCING YOUR MESSAGE

These samples explain why the message is problematic... along with alternate positive or neutral language:

**“It’s time to *shape up* for summer.”**

**Problem:** Promoting a seasonal urgency for fitness implies physical activity isn’t ... and doesn’t need to be... part of everyday life.

**Better:** “Trying a new sport this summer? We’d love to hear about it; share a photo and 1-sentence description on the message board.”

**“*Guilt-free eating* at today’s salad extravaganza!”**

**Problem:** Unless you’re stealing food, there’s nothing to feel guilty about. This message reinforces the detrimental habit of attaching moral judgments or emotionally charged labels to food choices.

**Better:** “Enjoy your choice of fresh local fruits and veggies at today’s salad bar!”

**“*Everyone needs a cheat day.*”**

**Problem:** Eating what you want to eat isn’t cheating, it’s just eating. Again, this message supports thinking about food choices as *good* or *bad* and promotes an unhealthy relationship with food. A flexible approach to nutrition helps people make healthy eating a habit for life.

**Better:** “Savor your favorite foods; if they’re less nutritious, enjoy them in smaller portions and less often than more nutritious foods.”

**BY BETH SHEPARD**  
Health Promotion  
Consultant, HES



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“Eating what you want to eat isn’t cheating, it’s just eating.”

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“Just do it. *No excuses!*”

**Problem:** This message offers yet another chance for people to feel ashamed and discouraged when they slip up or don’t achieve their goal on the first or 20th try. Truth is, lasting lifestyle change takes a lot more than commitment; it takes readiness plus the right information, skills, and level of support along with access to things like a variety of produce and opportunities to stay active.

**Better:** “What’s 1 thing you can do today to move toward your well-being goals?”

See the difference? These messages are designed to welcome and inspire all people — those with:

- Any ability limit, fitness level, or size
- All kinds of prior positive and negative experiences with behavior change attempts
- A wide range of self-efficacy levels and emotions relating to healthy behaviors.

The idea is to invite everyone to move in the right direction while encouraging a kinder, healthier way of thinking about behavior change.

## INSPIRING A HEALTHY MINDSET

Using neutral or positive language to convey well-being messages will help your population leave behind a damaging mindset in favor of one that helps them feel good about changing behavior and launches them on a long-term path. Best of all, as people normalize this new, helpful way of thinking and talking about healthy living, they’ll exert a positive influence on others... including their families and coworkers.

Take a fresh look at your messages this week. Rewrite and polish as needed to boost motivation and support people in adopting the healthy mindset they need to win at wellness. 📧

### YOUR TURN

Got a favorite... or a pet peeve? What are the most motivating or demotivating wellness phrases, memes, and messages you’ve seen?

Please share them with us at [editor@hesonline.com](mailto:editor@hesonline.com).

## SAYING GOODBYE TO DEBBIE DOWNER

We have the privilege of supporting hundreds of thousands of participants each year through our online wellness campaigns for clients and partners. In 99.9%+ of any issue with the program or technology, we’re able to help the participant to their satisfaction. But occasionally, we’ll run into a situation where, short of hopping on a plane to train someone on how to use a computer, we just can’t seem to make them happy.

There’s no formula for when to finally say “sorry, we don’t think we can help you,” but if you’ve been a well-being practitioner for long you’ve probably experienced the same thing. Here are some clues it might be time to cut your losses and invite the participant to move on:

- **They’re not interested in helping themselves.** We’ll stay on the phone, do an on-the-spot Zoom® or Skype®, and send detailed instructions with screenshots as needed for someone who’s making an honest effort. But when the participant wants you to do something for them that they can do for themselves, it’s time to let them go.
- **They’re disrespectful.** There’s a difference between being frustrated in the moment and being purposefully nasty. We always try to calm the participant with extreme kindness, but some just won’t have it. Anger usually has little to do with you; they’re just unhappy that day or in general. Regardless, maintain your decorum but ask them to discontinue using the service if they remain disrespectful.
- **They’re poisoning the well.** Whether online or in person, a few people are out to bash your wellness efforts. They may have had a legitimate gripe at one time or not, but they’ve made it their mission to let everyone know. Don’t let it go. Confront them with a last attempt to make it right, but also make it crystal clear that if they persist, they’re no longer welcome.

In each instance, be sure to maintain full documentation of all your efforts to help the participant. Most will go away quietly, but if Debbie decides to double down and go over your head, you want to have all the support at your fingertips. 📧



## IT'S OKAY TO HAVE LOW PARTICIPATION. REALLY.

At HES we make our living by participation numbers in our wellness campaigns. The higher the better. And the trend should be up, not down. So we spend a great amount of time and effort analyzing our promotion and engagement results to be sure we're doing all we can to get better — week in and week out.

But not all wellness services you offer your population should be driven by number of signups. In fact, there may be situations where registrations for this or that give a false sense of accomplishment when you actually may be losing ground.

A common example is gift cards awarded for online participation in 1-time events. These kinds of promotions typically start out well, with people opting in and performing the desired behavior. But if you simply have to complete a form, check a

series of boxes, etc., with no built-in accountability, folks learn pretty quickly they can get \$50 for doing almost nothing. And if the service doesn't change and evolve year over year — to reignite intrinsic motivation — it's amazing how quickly large groups of people learn to game the system.

Some examples where low(er) participation may be better:

- **Smoking cessation.** In most workplaces with under 15% smoking rate, you're getting down to very small numbers of people who actually *want* to quit. So rather than trying to persuade all remaining smokers to enroll (it doesn't matter that you want them to quit), change your messaging to something like: *This is a program for people who want to quit. If that's not you, wait until you are ready.*

- **New initiatives.** With programs transitioning from a physical health focus to a broader well-being effort, there will be times when it's okay to start slowly and build your reputation. Interventions addressing community well-being, emotional fitness, career health, financial security, mindfulness, and others need time to become accepted ideas within the organization. Make sure whatever you do that's new and outside traditional wellness norm is outstanding to help generate numbers over time. Be patient but not complacent.

- **High-risk interventions.** In the commercial swell of high-risk intervention vendor services coming to market, some claim large percentages of enrollees. Be cautious. There is no secret sauce when it comes to attracting at-risk participants to these interventions. People become high risk over time, with habits that are hard to change. It doesn't happen quickly. And artificially inflating participation — through rewards or punishment — in the hope that something good will happen could work against your long-term interest. If participants fail because they're not ready it reinforces a belief that they'll always fail. Again, be patient but not complacent.

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**“... artificially inflating participation — through rewards or punishment — in the hope that something good will happen could work against your long-term interest.”**

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The right participation level will vary by intervention and by employer. The key for you is making sure *every* service, tool, intervention you offer is something your population wants and as good as it can be. 🌱



# WELLNESS LEADERSHIP SKILLS FOR FRACTIONAL TIMES

The death of polite society is accelerating with social media. Not a day goes by when a politician, celebrity, or professional athlete doesn't tweet or post something offensive. Immediately sides form to denounce or defend — sometimes thoughtfully, sometimes with good humor, but often in ways that could easily be considered more offensive than the original.

“... it's more important than ever that wellness leaders step up and display the skills that will help their population rise above the fray...”

The negativity is exhausting. It wears on everyone, including the populations wellness pros are trying to help. And while there's no irrefutable evidence that the non-stop nastiness is dragging down our physical and emotional health, it sure feels like it.

Amid the tumult, it's more important than ever that wellness leaders step up and display the skills that will help their population rise above the fray and stay focused on personal well-being:

- **Focus and enthusiasm.** Influential people believe in their mission and have a passion to fulfill it as well as they can. That enthusiasm and conviction will rub off on participants.

- **Sense of timing.** Career wellness pros study human nature and know when to nudge and when to back off. Patience when patience is called for is just as important as action when it's time to move.
- **Decisiveness and all-out action.** Leaders tear into projects when they believe it's the right course. Setbacks — budget cuts, change in leadership, reduction in staff — are only that, not defeat or a reason to retreat.

“Patience when patience is called for is just as important as action when it's time to move.”

- **Leadership aura.** Well-being leaders maintain control even in the middle of the seeming chaos of national or world events. People gravitate to those who keep their cool while others are coming unglued.
- **Ability to accept rejection without taking it personally.** Wellness leaders may be down from time to time, but never out. Remaining detached from setbacks lets you study them objectively and come back prepared to do better on the next attempt.
- **A sense of urgency.** Not to be confused with panic, urgency is a do-it-now and do-it-right attitude that runs through all endeavors.

As with most skills, leadership takes practice — a conscious, deliberate, daily effort to improve on the characteristics outlined here. Wellness pros can empower people through strong example. When you add genuine concern, you're more likely to inspire participants to begin and sustain behavior change that raises the level of well-being in your entire population. 🇺🇸



✓ The SOMBodies, a top 3 Keep America Active team.

# WELLNESS PROGRAMMING GETS PERSONAL AT CLEVELAND'S CASE WESTERN RESERVE UNIVERSITY

BY DEAN WITHERSPOON  
CEO and Founder, HES



SPOTLIGHT



Spend a few minutes chatting with Elizabeth Click and Mary Ann Dobbins about Case Western Reserve University's well-being program and you come away thinking this is how workplace wellness should be done. While initial discussions began in 2011 — spurred by rising incidences of chronic conditions and associated expenses — the formalized effort is just 4 years in the making. What's emerged is a homegrown program that makes best possible use of internal resources and expertise while selectively going outside the university for services to meet specific needs. But the most compelling aspect of Case Western Reserve's approach is the deep commitment to knowing and addressing staff and faculty interests as well as needs.



## IN THE BEGINNING

A new medical director position was established in late 2012, in part to lead wellness-program development and have a broad-based, incentivized program in place by 2014. Elizabeth, an assistant professor at CWRU for the previous 8 years, accepted the role. She soon recruited Mary Ann, whose background included stints at Progressive Insurance (where she and Elizabeth first worked together) and Duke University, to manage day-to-day operations and become wellness coordinator.

Before jumping headlong into providing services, CWRU did its homework — researching university best-practice models, exploring successful corporate programs in its region, and ultimately adopting the WELCOA framework (*The 7 Benchmarks Evolution*) for program design. (For a detailed overview of CWRU's application of the framework, read *Essay: Creating a Culture of Health — One University's Experience.*)

Maybe the most important step in getting a successful program off the ground was the extent they sought input from leadership, stakeholders, and the 4100 benefit-eligible faculty and staff they serve. That foundation continues to sustain the program today. “Our president and provost are very supportive, often highlighting aspects of our programs in presentations or other communication on campus,” notes Elizabeth. “Our incredible instructors... really engage with our participants. We're very lucky to have them on campus,” confirms Mary Ann.

## ALL WELLNESS IS LOCAL

One early decision they credit for staying close to the population was not having a wellness platform. Mary Ann explains: “It gives us a better sense of what people are really drawn to, while I think sometimes a platform can be a technical barrier. We can tell what people are enjoying and what they're not so interested in pretty quickly.”

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“We can offer programs in a more personal way, where people get to know others across the university and interact with colleagues...”

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Elizabeth adds: “It allows us to offer information and services in ways that people can more easily engage and participate in.”

CWRU makes extensive use of world-class, on-campus expertise, employing talent within multiple schools and departments to deliver physical activity, weight-management and nutrition, stress-management, tobacco-cessation, and financial well-being services. “We can offer programs in a more personal way, where people get to know others across the university and interact with colleagues... It seems to work really well for us,” comments Elizabeth. “And with the help of the CWRU Benefits team, HR Service Center, and UTech groups, we have necessary technical and personal support.”

## CREATING COMMUNITY

An exciting emphasis for CWRU is a series of services designed to foster a sense of community on campus:

- **Sustained Dialogue** ([sustaineddialogue.org/studies/case-study-3](http://sustaineddialogue.org/studies/case-study-3)). This initiative focuses on student groups as well as faculty and staff groups, where people get together early in the semester, meet weekly to discuss campus and diversity issues, and come up with recommendations to improve the campus experience.
- **Books@Work** ([thedaily.case.edu/build-community-bookswork](http://thedaily.case.edu/build-community-bookswork)). This Cleveland-based nonprofit uses literature to build workplace skills. Led by CWRU faculty, the discussions break down barriers and build a workplace culture of trust, respect, and connection.



▲ The CWRU Crafters@Case group displays their donation in December 2017.

- **Crafters@Case.** Now in its fifth year, Crafters@Case brings together a diverse group of faculty, staff, and students from CWRU, University Hospitals, and Cleveland Clinic to create hats, scarves, and other items for donation to local charities.

Most of the community well-being, and other wellness incentive offerings, are live, multiweek programs. Meeting times and locations vary to allow as many people as possible to participate, with some online alternatives for those who cannot attend.

## DOLLARS THAT MAKE SENSE

Like many workplace programs, CWRU offers incentives for participation. It's a 2-part system where participants can earn up to \$500/year:

- **Wellness premium.** Benefit-eligible employees who complete the biometric screening, HRA, and tobacco-attestation form receive \$25 a month (\$300 annually).

*(continued on next page)*

- **Cash incentive.** Participants who complete any of the 6 program areas receive \$100, and another \$100 if they complete a second.

Unlike some incentive plans, CWRU's approach isn't punitive — and the amounts are modest. This creates a positive experience that, when combined with quality programming, produced 58% voluntary participation in 2017 — and many more who aren't enrolled in the incentive program participate anyway because of its quality and reputation.



▲ Books@Work brings faculty and staff together for community building and lively discussion.

## BOOTS ON THE GROUND

CWRU recruits Wellness Champs whose volunteer job is to spread the word. It's about an hour commitment each month that involves creating a list of campus coworkers/friends and sharing biweekly emails on upcoming activities. They also help out with events on campus, like leading walks and staffing the wellness program table at the annual Party on the Quad. "We really rely on them and their judgment as to what people are interested in; we have very enthusiastic folks that we're very grateful for," Mary Ann reports.

**"It's important to us to have a full understanding of the comprehensive impact of the program on our population."**

## CHALLENGES

Not everything the wellness program touches turns to gold. Early on, CWRU enlisted the University of Michigan Health Management Research Center to help with data collection and analysis. There was, and is, a heavy emphasis on evaluation. But the UM center closed in 2016, so they had to regroup and start again in 2018 with a new vendor. Elizabeth underscores, "It's important to us to have a full understanding of the comprehensive impact of the program on our population."

And, like other wellness programs, some segments — particularly men and faculty — are underrepresented in their participation numbers. "We haven't really figured it out," Elizabeth says, "but we've learned we're not alone — other universities tell us they struggle with it as well."

## "IT'S DAWN?!? I LOVE DAWN!"

Looking ahead, the wellness program plans to leverage its considerable on-campus talent pool and expects more participant reactions like that to Dawn, an instructor. Elizabeth adds: "In many ways, our facilitators are active promoters of helping each person realize their potential."

A healthy department toolkit is in the works following extensive research with other universities and detailed feedback from the Champs. Mary Ann expects this to be another way for groups within the organization to personalize their well-being experience.



▲ Staff show off their hooping skills at the annual Party on the Quad.

Chronic condition programming is an area of focus going forward. To that end, CWRU is piloting a coaching solution this fall and exploring ways to leverage a new HRA tool later this year, as well as onsite biometric screenings, to channel people into appropriate interventions. And further down the road CWRU is exploring ways to engage spouses/domestic partners in well-being services.

## PARTING THOUGHTS...

As Elizabeth and Mary Ann reflect on the program's progress to date, they underscore the importance of knowing your environment and having as many connections as possible, internally as well as regionally. With each new initiative, they highlight the need for extensive research on best practices and vetting of instructors and services. Both see an even brighter future ahead for CWRU's well-being efforts. 🇺🇸

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For more information, contact Elizabeth ([erc10@case.edu](mailto:erc10@case.edu)) or Mary Ann ([mxd490@case.edu](mailto:mxd490@case.edu)).



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**Just had my annual physical this week.  
Doc said whatever I'm doing, keep  
doing it. This is working well for me.**

”


— *Keep America Active* participant

#### **Evidence matters.**

Well-being participants want to see — and feel — results from their efforts. Business leaders want to justify their workplace wellness investment. Healthcare professionals want to see improvement.

The best way to satisfy all 3 agendas is to launch wellness campaigns grounded in science, not science-lite or hype. Solid research on adult learning, motivation, social support, and more is vital in designing effective well-being campaigns. If this isn't what you're using, results are likely to be lackluster at best.

When you launch a science-based product, you'll see and hear more success stories — when participants get a good report from their doctor and can link it to their wellness experience, they want everyone to know. Some will shout it from the rooftops; they'll all be back for more.

Next time you're looking for a new wellness product, ask vendors for the scientific evidence supporting their approach and design. You can find ours here: [hesonline.com/science-behind.pdf](https://hesonline.com/science-behind.pdf). 

**INSPIRED MESSAGES**



**BY BETH SHEPARD**  
Health Promotion  
Consultant, HES





# IMPROVE PARTICIPATION AND OUTCOMES WITH NEXT-GENERATION MARKETING

You offer top-notch well-being programs and make it easy for participants to engage. So why aren't participation rates or results meeting your program goals?

Talking with colleagues, I've observed a pattern — namely, that program marketing hasn't evolved with the times. Many well-being practitioners can increase participation and improve outcomes by using modern models of marketing — inbound and automatic — with personalized messaging.

**BY BOB MERBERG**  
Workforce Well-being  
Consultant



## INBOUND MARKETING

The principle of inbound marketing is simple: Instead of going out to find potential participants, you *attract* them to your program.

**COMMUNICATION**



To appreciate inbound marketing in action, consider your daily exposure to it. Those white papers, webinars, and subscription newsletters that well-being vendors offer? They usually feature information that helps you stay up-to-date and well informed as a professional. An enterprise offers these resources because they want to collect contact information from prospective purchasers interested in matters related to their products.

You can adapt this goal to your program, while also taking advantage of other reasons companies love inbound marketing:

- They want you to see them as the experts
- They're building name recognition
- They're creating or expanding the perception that their products are needed.

After a vendor has attracted you to their content, they may follow up with a more personalized email or phone call. This targeted approach provides better return on their marketing investment compared to cold-calling or blasting emails to a random mailing list.

How can you leverage similar techniques to increase program participation in a way that fits your organization's culture? You may not have the resources or know-how to use inbound marketing with as much sophistication as large corporations, but any well-being program can benefit from attracting participants instead of just hunting for them with posters and email blasts.

Apply principles of inbound marketing using:

- Intranet content
- Lunch 'n learns
- Webinars
- White papers.



For starters, provide unique, valuable wellness content on whatever platform you use to communicate with employees. You may not have a stash of great articles, but you or another leader can start an internal well-being blog that offers perspectives your target population is hungry for. Check your company's policies — you may be able to blog on your intranet or a freely available platform like WordPress® or Facebook®.

If a blog isn't in your future, write and post articles. As another alternative, you may be able to customize content provided by vendors.

Make the most of lunch 'n learns, webinars, and white papers. Most well-being practitioners think of these as stand-alone programs, but they should be viewed as content and used as inbound marketing opportunities.

Here's an example. Last year, my colleague Kim told me about her initial disappointment with enrollment in an online sleep-health program — we'll call it *Snoozzz* — launched at her large employer.

After the program languished for a few weeks, she held a 20-minute webinar about healthy sleep — convenient and no big commitment. She used information collected from the CDC and Sleep Foundation. It attracted hundreds of participants. Near the beginning and again at the end, she announced: "To learn more about our new program, *Snoozzz*, visit our well-being home page." The population of sleep-deprived employees responded and enrollment in *Snoozzz* skyrocketed over the next few weeks.

Creating content — whether it's an article or a webinar — may seem like it would be a drain on your time. That's where repurposing comes in. Kim converted the webinar to a podcast and posted it on the intranet. It continued to funnel large numbers of participants into *Snoozzz* over the next 6 months.

By default, Kim's webinar platform and *Snoozzz* generated participant rosters. Next time she implements a similar program, Kim can contact employees on the rosters (past participation is the leading predictor of future participation) with a more personalized message.

She could publish a simple white paper (3 or 4 pages) based on information gathered for her webinar — again, repurposing it — with a sidebar promoting *Snoozzz*. With a little design assistance and refresh, Kim could post the white paper so it shows up in intranet searches and post it to the company's internal social media. She also could share the white paper with *Snoozzz* participants and suggest they pass it along to coworkers.

In this scenario, Kim masterfully integrates inbound marketing with repurposing, personalized messaging, and word of mouth.

## AUTOMATIC MARKETING

Automatic marketing is exactly what its name implies: automation of recurring marketing tasks that would be too time-consuming to implement manually. This modern model streamlines your efforts and is the natural complement to inbound marketing. Individually or combined, these techniques do more than increase participation rates. They unobtrusively target participants who are most likely to engage in a program and achieve solid outcomes.

Targeted outreach — triggered by a specific date, event, or activity — is the most common automatic marketing practice.

If you shop on the web, you may experience automatic marketing when, for example, you receive an email from an e-commerce site that reminds you, "Product X is still in your shopping cart. Did you forget? You may also be interested in these similar products..." It's an automated message, personalized to your circumstances, triggered by an incomplete purchase.

Large-scale marketing automation requires specialized software, but you can be creative with email rules and — if it's okay with your organization — multiple email inboxes. Here's an example:

- Have a generic email address: *help@xwell-being.com*. Set auto-replies so that employees seeking help get a simple message saying they'll be contacted within 24 hours and "Have you visited our FAQ page?"
- Create a specific email address: *snoozzz@xwell-being.com*. The autoreply, in addition to acknowledging receipt and thanking the sender, can link to other programs or resources likely to interest them.

Create email addresses and auto-replies for other major programs and, for your convenience, have all incoming messages directed to 1 manageable inbox. This automation spares you from having to personalize marketing messages to individual employees based on their initial interest, and as a bonus can organize messages based on subject.

With autoreplies, you can get fancy and link, for example, to the financial wellness program if the original sender's message includes the words "fee," "charge," or "money." But don't go overboard. You'll sacrifice efficiency if you get too granular.

## YES, YOU CAN

Dedicate 1 morning a month to work on content for inbound marketing and to experiment with automatic marketing. It will save you time in the long run and improve your program.

Full-time marketers combine inbound marketing and automated marketing with a host of other techniques, some of which I'll share in a future column. But don't bite off more than you can chew. *Think* like a modern marketer, and soon you'll create your own methods to optimize the tools available to you. 🚀



# THE POWER OF OPEN-ENDED QUESTIONS IN WELLNESS PROGRAM EVALUATION

Many organizations survey employees too much. How do you know if you're one of them? If you don't do anything with data you collect other than say "Hmm... that's interesting" or you simply allow yourself to say the data confirms what you already knew. In both instances you've wasted resources and your employees' time. And if "management wants the information" but doesn't ask what's going to happen as a result of what you learned, then your leaders are guilty of wasting an opportunity as well.

## DO LESS

It goes against our instincts to ask for less input because most wellness pros are pleasers... we *want* to know what people think so we can do it better. That's laudable. But if you're collecting so much feedback — in annual audits, end-of-program surveys, focus groups, contact requests, pilots — that you can't *act* on what you're learning, what's the point?

Is your goal continuous improvement, doing a better job of creating a health culture, and providing resources where those you serve can achieve their best physical, mental, and emotional well-being? Then you may have to do *less* data collection so you can do *more* with it.

## MOST, LEAST, BETTER

Multiple choice questions are easy and efficient. They're also the least useful because you're giving responders the answer. If you really want to know what they're thinking, why would you do that? At HES we wrap up each pilot program for a new product with 3 questions: What did you like *most*? What did you like *least*? What can we do *better*? In each we're looking for trends:

- **Most.** We want to know what's working well so we can do more of it, figuring out ways to leverage it in the new campaign as well as other products.
- **Least.** Finding out what annoyed people is the best way to smooth

out the rough spots. Many will tell you straight up, but others have a hard time offering criticism.

- **Better.** For those who find it difficult to say what they liked least, we can often get a response about what we can do better; it feels more constructive. So we look for crossover trends between least and better.

Most, least, better may not be the right open-ended questions for what you're evaluating, so look at each service for the vital feedback you really want to elicit. Keep the questions simple, with a single topic; asking 2 questions in 1 is confusing and makes analysis near impossible. Limit your total number of open-ended questions to 5 (4 is better and 3 is best). Fatigue begins to set in after 3, and after 5 forget it — any data you do get will likely be useless.

## ANALYZING OPEN-ENDED QUESTIONS

Confirmation bias is the biggest risk here. We're all biased and gravitate toward responses that align with our view, overweighting them relative to the big picture. In our experience, people who claim total objectivity the loudest succumb most easily to confirmation bias.

To limit this problem, we give our survey responses to 3 different people — the more distance and less knowledge of the project, the better. They independently sort the answers into similar buckets, then look for a natural break in the number of people commenting. Usually 2-4 like-minded answers float to the top for each.

Every time, we end up with at least 1 item all 3 reviewers agree on as something to address; that's the first thing we work on, then we move on to the rest. It's not perfect, but this process has never failed us — we've always come away with at least 1 significant thing to change. And that's a lot better — for you and participants — than "Hmm... that's interesting." 📧

# SUMMER SCHOOL



## RESEARCH TAXES.

When a summer job requires a W-4 form, use a withholding calculator to see if the earner may be exempt or should file a tax return. Generally, when under-18s are household employees in jobs such as babysitting or lawn mowing, they don't have to pay income tax. Ask an expert about your specific situation.

Remember your first summer job? Were you saving up for a car, college, or video games? If the kids in your life have summer work, chances are they could use some money management guidance. Pass along these tips.



## SAVE SOMETHING.

A simple budget helps divide paychecks into spending money and savings for a larger goal. A compound interest calculator [[investor.gov/tools/calculators/compound-interest-calculator](http://investor.gov/tools/calculators/compound-interest-calculator)] shows how putting away a little each month can really add up over time.

## You can help a young person become more money savvy.

Help create a monthly budget, putting the difference into a savings account or Roth IRA:

Income	Income Estimate	Actual Income	Difference
<b>Wages/income</b> (including paychecks, allowance, birthday money, etc.)			
<b>Interest income</b> (from savings account)			
<b>Income subtotal</b>			



## INVESTIGATE INVESTING.

Savings and checking accounts are a must, but additional options are worth exploring. With a Roth IRA retirement fund, qualified withdrawals are tax-free. After a 5-year waiting period, the account holder can use some of the money for a first home purchase or college expenses. A 529 is another way to invest money specifically for college savings.

Expenses	Expenses Estimate	Actual Expenses	Difference
<b>Savings account</b>			
<b>Bills</b> (rent/mortgage, cell phone, etc.)			
<b>Car</b> (payment, insurance, gas)			
<b>Shopping</b> (clothes, snacks, etc.)			
<b>Entertainment</b> (movies, video games, etc.)			
<b>Other</b> (clubs, subscriptions, etc.)			
<b>Expenses subtotal</b>			

<b>Net income</b> (income minus expenses)			
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## TAKEAWAY



COMING SOON!



Send participants on an action-packed adventure to better health with this exciting pirate-themed wellness campaign.

[HESonline.com/products/yo-ho-ho](https://HESonline.com/products/yo-ho-ho)

In the deep crevices of The-Caves-No-One-Dares-Enter lives Grim Gus Battaraz. Known for his looting and raiding, Gus is at it again, but this time he's ransacked *your* treasure... and he's on the run. Unlock new scenes and story developments as you track healthy habits.



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