

2021 Wellbeing Market and Trends

Created in partnership with
Josh Bersin

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As much we would like to forget the calamities of 2020, no one can deny the significant focus these issues brought to the topic of wellbeing inside and across organizations around the world. The corporate wellness (or more broadly the corporate wellbeing) market is now estimated to be around \$61 billion, according to Grandview Research (February 2020 industry report publication). Grandview estimates this market growing at a CAGR of 6.9%, while the Global Wellness Institute estimates it to be closer to 4.8%. Regardless of the stats, this category is undeniably exploding with new entrants and vendors who are looking to address a wide range of employee needs from physical fitness to mental health to financial care to fulfillment and better community connections in the workplace.

The bottom line is that organizations in 2020 experienced an accelerated need to address a myriad of health and wellbeing challenges that their people will continue to experience into 2021 and beyond. This is in part being dictated by an ever-evolving social contract, requiring organizations to pay more and more attention to the role they play in the lives of their employees - inside and outside of work.

Through Josh Bersin's Big Reset initiative as well as our connections with HR leaders around the world, we have identified a set of trends that we believe will significantly change the way employers think about wellbeing vis-a-vis employee experience and organization culture for some time to come. Additionally, we have studied the current marketplace of wellbeing solution providers, and are providing a lens into some interesting vendors offering support to address a wide range of health and wellbeing needs that employers are now scrambling to address. These offerings, in the context of the below wellbeing trends, provide an interesting dynamic for employers and vendors to navigate in the years to come.

Top 11 Trends

1. The late adopters are catching up as more companies expand from "wellness" to "holistic wellbeing."

Organizations have been thinking about employee health and safety since the dawn of the industrial revolution. Workplace wellness emerged [in the late 1980's](#) when many major organizations were starting to focus on physical health and related healthcare costs. In 2010, Gallup published "Wellbeing: The Five Essential Elements," a book co-authored by Tom Rath and Jim Harter, which expanded the definition of wellness to encompass more holistic elements of wellbeing such as career, social, financial, and community. It wasn't until the last several years, however, that more organizations began thinking more holistically about their programs and resources to address total employee wellbeing. In 2020, the term wellbeing has become much more mainstream and organizations are now thinking more expansively about the many elements that impact the health and happiness of their employees - well beyond physical or even mental and emotional health.

This shift means that instead of just adding on wellness programs outside of work. Think step count challenges, corporate fun runs, heart walks or smoking cessation programs. Companies are rethinking the work for wellbeing and identifying problems and opportunities in the work itself. In [Deloitte's 2020 Human Capital Trends report](#) of about 10,000 executives around the globe, wellbeing was rated as the most important issue on C-Level executives' minds (even before the pandemic hit).

2. Wellbeing has crossed the benefits team barrier and has reached the boardroom and C-suite. 2020 brought about a stark shift in the conversations happening inside boardrooms and executive management teams around the world. The global pandemic not only made employee health and safety a priority agenda item for boards and leadership teams, but ongoing civil and social unrest brought psychological safety, community belonging and inclusion front and center for a lot of companies. Many boards were focused on the pandemic response of leaders in supporting essential workers as well as considerations for effective work from home set-ups, return to office plans and ensuring ongoing attention to employee health and safety. C-suite leaders were more proactively engaged in

employee listening sessions and addressing the ongoing and ever-evolving needs of their people.

And this shift has impacted leaders at all levels. From non-profit organizations like Make-A-Wish to small life sciences companies like Voyager Therapeutics to massive telecommunications giants like Deutsche Telekom, the conversations in the boardroom and the C-suite are addressing the ongoing health and wellbeing needs of employees, especially as needs shift and evolve. We believe these topics will continue to have a place on business agendas for some time to come as executives have been jolted into the criticality of wellbeing on their people's performance and productivity.

In [Josh Bersin's research study on the pandemic responses](#) of more than 1,400 companies, we saw that a holistic focus on wellbeing correlates with high performance. Companies that see wellbeing not as an optional employee add-on benefit but as a business necessity are much more likely to accomplish superior financial results, satisfy customers and deal effectively with change. For example, organizations that help workers take care of their families are 5.2 times more likely to achieve outstanding results than those that don't.

3. Wellbeing has become an essential leadership capability, and leaders must really own wellbeing if they care about the overall employee experience and want to positively impact productivity. In just about every leadership conversation this last year, empathy was one of the most frequently used terms to come up as the key to what underpins an effective wellbeing leadership focus. Leadership behaviors that support personalized wellbeing include paying attention to the individual needs of employees, interest and inquiry into their unique situations and circumstances, listening for understanding, and acknowledging the personal and professional challenges being experienced by all. In Sprint 3 of the [Big Reset initiative](#) we focused on human-centered leadership with this in mind. During one of these discussions, an HR leader from Canada underscored what we have heard from so many. The shared experience of navigating the pandemic, sheltering in place and working from home gave leaders a newfound appreciation for the struggles and challenges of those working remotely in their employ. Essentially - they were now able to share and better understand the feelings of their employees - the definition

of empathy. The ongoing opportunity for leaders is how to share and understand those feelings without direct shared experience. For example, at Autodesk, managers are encouraged to take the employee's family life into account when providing career counseling because it helps them tailor their support to what the employee really needs.

4. Wellbeing acumen is now an essential HR capability.

This requires HR to be adept at facilitating wellbeing in a comprehensive way - not just through program and resource offerings, but also by embedding wellbeing into company culture and operating norms. HR's ability to facilitate culture change and develop the leadership behaviors that support wellbeing has become an increasingly important component of the people strategy and people agenda inside many organizations.

Historically, the wellbeing program started as a benefit to reduce insurance expense. Over the last decade it became focused on employee fitness, mindfulness, sleep, and focus ([Google's course on mindfulness in 2014](#) was one of the hottest topics in HR). Since then, the concept has expanded: today HR teams think about wellbeing in the context of physical and mental health, workplace safety, inclusion and diversity, and even career and rewards. It's the new integration point for many of the things HR leaders think about.

A good example of this is the recent discussion we had with the CHRO of one of the world's largest high tech manufacturing companies. The CHRO, who is a very senior hard-charging executive, told us that her biggest challenge is the burnout of her senior HR team. Several of her operations and talent leaders are not getting enough sleep, not eating well, and are missing deadlines because they're overworked. She told them to take time off and slow down, and started working closely with them to reduce their workload and help them prioritize. She told us this story in late November, and after only a few weeks her HR team began to feel better. HR professionals have to not only provide wellbeing solutions, but also learn how to slow down, check-in, and prioritize. This is a new theme of wellbeing and productivity, and it's now becoming an essential skill for every HR leader and business partner.



Figure 1: Impact of Wellbeing on Performance

5. No barriers. You don't go to work. work comes to you.

Thanks to the pandemic, people are working everywhere. And this has created a new level of transparency, exposure, and authenticity.

It's very common for senior business people to openly share their kids, pets, and home offices online. Living places and spaces are on display for all to see. Even the choice of virtual backgrounds can reveal something about personal preference or personality. This amalgamation of work and home provides new ways of connecting with employees and their families - not only in direct support of their wellbeing but how that enables strengthened community connections and company culture.

As one example, Banco Santander brought employees and their families together virtually with other Banco Santander families to simply make music together. Pat Wadors, chief people officer at Procore and former chief talent officer at ServiceNow, orchestrated video conference meetings in a "show and tell" format in which people would take turns bringing something meaningful to them from inside their home and sharing it with their colleagues as a way to know teammates more deeply. Through the Big Reset, we have seen countless other examples of strengthened connections given the dismantling of the work/life barrier. Like it or not, our work and our lives are even more tightly intertwined and visible to others. Acknowledging this integration - even in a

post pandemic workplace setting - will continue to help people appreciate each other's uniqueness and build stronger work relationships in the process.

6. Family health and wellbeing is no longer optional. It is now more critical than ever for organizations to recognize and support family wellbeing beyond providing medical and dental insurance to dependents. Caretaking responsibilities of working parents AND those supporting aging parents or the elderly became a major source of stress that many employers had to figure out how to alleviate in 2020. Beyond caretaking, the intricate connections between work and home life now revealed made the case for employers to incorporate resources, programs and support for not only those who are employed but also for those that are deployed at home. As an example, companies like Chubb and Autodesk used internal Slack channels to create family and friend caretaking tools, tutoring aid, and cooking classes. Chubb also held family hours online as well as movie nights for employees and their families. Novartis even expanded its Coursera library to families to access and utilize. Reliance Industries, a large Indian conglomerate, saw a massive uptick in the use of its COVID app by family members of their employees, with as many as two thirds of the use coming from that population. All of these organizations embraced expanded support and care beyond their employees to include their wider community of families.

7. Mental and emotional health concerns are beginning to lose their stigma, and proactive mental health support is becoming more mainstream. This is not to say that stigma no longer exists. But in 2020, more organizations and leaders opened up genuine dialogues on mental health. This is the silver lining to the unfortunate realities brought about from increased stress and anxiety stemming from social isolation, financial insecurity and racial injustice among other causes. We are seeing more companies opening up dialogue with a simple statement that “it’s ok not to be ok.” Leaders and employees at one life sciences company shared personal stories of their own struggles or that of family members to normalize mental health challenges like bipolar disorder, depression and living with anxiety. This led to expanding its counseling and therapist offerings beyond what was available through its EAP and making support more accessible and affordable to not only employees but their families as well.

8. Life coaching is taking on an expanded role and importance.

Organizations are moving beyond “EAP” and “counseling” to support the mental and emotional needs of their people and their families. Coaching is also taking many different forms from peer support to dialogue circles to broad-based coaching through digital solutions as well as virtual and live therapy. Some vendors like Imperative and Wisdom Labs combine the power of their digital platforms with peer resources inside organizations to create supportive one-to-one relationships or small community groups to support learning and application of new skills.

Aurecon, an international engineering, design and advisory company, implemented a proactive leadership coaching approach to support leaders as they navigated the challenging restrictions of the second lockdown in its Melbourne office. The approach was designed to translate the challenges being faced by their leaders into opportunities for growth and development. Aurecon leaders were provided an opportunity to have a one-on-one coaching conversation to reflect on their personal experiences, their leadership and how they adapted during these challenging times. Approximately 80% of the targeted audience voluntarily elected to participate in this coaching experience, indicating strong demand. Another company, Legendary Entertainment, one of the most successful

movie and comic publishers in the industry, hired life coaches to help creative and executive staff learn to meditate, practice yoga, and embark on vigorous exercise regimens at home. Deutsche Telekom provided significant support to managers for leadership in crisis, with online interactive workshops and three toolkits, so that managers could serve as coaches for their team members. We see more companies expanding their coaching support and leveraging it as something as normal and necessary as going to the dentist for employee health.

9. Digital strategies now need to intentionally account for wellbeing. The digital wellbeing space is one of the hottest markets in the world. New research shows that [\\$8.4 billion of equity flowed into privately held digital health companies](#) this year, and this is paying off quickly. Everything from telemedicine, e-coaching, online diagnostics, and managing symptoms is now taking place online. Today 25% of Americans manage their prescriptions online, 23% have shared symptoms online, and almost 20% have had doctor visits online.

And the new digital life we lead is expanding the wellbeing agenda. The term “Zoom fatigue” didn’t even exist before 2020. Without video conferencing platforms like Zoom, 2020 would have been even that much more difficult for companies to keep their employees connected. That said, we all know that sitting in front of a computer all day can have many negative effects on our health and wellbeing. Organizations are beginning to consider policies, practices and operating norms to employ in concert with their digital strategies so that digital adoption doesn’t result in digitally-induced disabilities.

To foster mental wellbeing and digital disconnection, Banco Santander stopped all emails, messages, or meetings during the lunch hour to give people a chance to rest. A consumer products company shortened 30-minute meetings to 25 minutes and 60-minute meetings to 50 minutes in order to encourage breaks and movement in between those meetings. Some companies increased the number of company-wide days off to include once-a-month mental health days. Patagonia even implemented an every-other-Friday-off policy. A number of leaders at a variety of companies are now doing walking meetings over the phone instead of in front of the screen.

Many of our clients are greatly reducing the number of meetings scheduled and telling employees that video is optional and it's permissible to skip meetings when too busy. Both PepsiCo and AB InBev found that their performance management practices were burning hundreds of thousands of hours in talent reviews. Both companies radically simplified the process just to help people save time. Both report that the results are excellent.

10. Silo busting holds the potential for real impact. We have seen stronger integration of wellbeing efforts across all enterprise areas including learning and development, diversity, equity, and inclusion, corporate social responsibility, environment, health and safety, and facilities. These team integrations hold the key to effectively developing comprehensive and effective wellbeing solutions for greater return on value inside large enterprises. For example, Herc Rentals sees diversity and inclusion, health and safety, engagement and experience all part of the bigger picture of wellbeing. When people are well, they can perform well. So the company helps leaders, managers and employees understand that connection with examples and stories. Some organizations have added to leadership teams a chief health officer to look out for health and wellbeing across the entire supply chain, from suppliers to employees, contractors, gig workers to customers and partners. This position is designed to bust silos and hold leaders accountable for wellbeing behaviors. In some companies, responsibilities even encompass DEI, as it can be seen as part of wellbeing in the widest sense.

11. Putting it all together: the future of work and wellbeing is about moving beyond employee experience to a new horizon that is more about the overall life experience of employees. We are seeing a handful of corporate leaders who are thinking more progressively about their role in their employees' lives and are starting to think beyond employee experience to how they can positively impact the lives of their employees at work and after hours.

For example, Oshkosh Corporation has a people-first strategy. Not only is the first section of the company's overall business strategy about its people, but the senior leadership team starts every boardroom discussion with a focus on people. Patagonia is beginning to think about how it can be a regenerative

company - not only in giving back to the planet to reverse climate change, but in how it can give back to employees beyond engagement. Recently, Patagonia decided to close every other Friday to give employees more time off to rest and recover from stress and anxiety and maybe spend some time outdoors. After this change went into effect, employees reporting they had better relationships with their spouses and kids and that they finally had time to do mundane but important things like scheduling check ups. Essentially this one change for Patagonia employees helped make their lives better overall.

Companies are beginning to realize what Jeffrey Pfeffer wrote about in his book, "Dying for a Paycheck." Organizations can be a source of good in people's lives or they can be the cause of illness and poor health in people's lives. Progressive companies are now thinking differently about how to be the former and stave off the later.

The Wellbeing Market

The overall corporate wellbeing market now comprises thousands of vendors and solution providers ranging from technology platforms to consultants to coaching and support providers. A sample snapshot is provided below to highlight just some of the more interesting vendors we have found in this space. We categorized these vendors into market segments specific to the area of wellbeing that they address (in some cases directly, in other cases indirectly). While some vendors cut across two or more segments, we categorized them into a primary segment that best reflects our view of their core services. There is also a market segment that is more broad based, providing solutions across many or all of the wellbeing elements identified. We refer to these vendors as "holistic wellbeing" vendors, indicating an ability to bring together multiple wellbeing solutions across three or more elements.

The Framework

Our framework is comprised of six wellbeing categories in addition to the holistic wellbeing category as defined below:

- **Fulfillment and Citizenship:** Doing things that bring a sense of happiness, citizenship, and positive impact
- **Human Connection/Social Wellbeing:** Having trusted valued relationships and interactions in one's life
- **Financial Wellbeing:** Having and managing resources to live one's desired independent life
- **Physical Health:** Having good health and energy to do the things one desires through body wellness
- **Mental Health and Mindfulness:** Having good health and energy to do the things one desires through a focus on the mind
- **Caretaking Support:** Support for working parents or those caring for aging relatives

Our Maturity Model

As we talk with many hundreds of leaders about their wellbeing strategies, we realized that there is a maturity model to their strategies, so your selection of vendor partners will vary based on your focus and maturity status.

Level 1: Healthcare Benefit: At this level, companies focus on healthcare outcomes. Here companies look at various health and fitness programs focused on reducing insurance costs, increasing overall employee health, and helping employees stay energetic and able to work.

Level 2: Personal Improvement: At this level, companies start looking at wellbeing as a way to help employees stay engaged, energetic, and personally healthy. This is where programs like mindfulness, yoga, sleep programs, general mental and physical fitness, and group health and counseling become important.

Level 3: Business Performance: Here the company sees the wellbeing as a way to help keep people engaged and productive. Better workplace benefits, programs to provide on-the-job work aids, and general focus on helping people “come to work ready to work” are all part of this stage. Also included is a focus on financial health which helps people avoid worry or family stress.

Level 4: Wellbeing for Social Good: Level 4 companies look at the entire experience at work as part of wellbeing and realize that social responsibility, philanthropy, DEI, and local volunteerism are also part of wellbeing. [Companies like Workday, for example, integrate this together](#) so local wellbeing managers develop local citizenship programs at each location around the world.



Figure 2: Maturity Model for Wellbeing, Josh Bersin, 2020

This evolution takes time. In many cases the first thing to do is just make the workplace safe and productive, and then as employees become familiar with your solutions, you can move up the maturity curve.

Vendor Listings

For each wellbeing category, we spotlight some of these vendors to highlight how organizations are leveraging their solutions to address the growing wellbeing needs of employees. We begin each category with a deeper dive on a few of these vendors, including some of the ways they have impacted their customers' employees. Then we include a set of shorter descriptions on some additional vendors offering services in this space.

Holistic Wellbeing Vendors

Today's corporate wellbeing market comprises a number of vendors who are offering solutions across multiple categories - all within one platform or solution offering. Many of these vendors provide direct solutions while others provide these solutions vis-a-vis ecosystem partners, and some do both. Some of the key players in this space include VirginPulse, THRIVE Global, Castlight Health, Limeade, meQuilibrium, Accolade, League and Sprout. The knowledge that their digital platforms gather enable them to push, nudge, and essentially encourage users to perform a variety of activities in support of their overall health and wellbeing.

Here is a closer look at a few of these solution providers:

[Castlight Health](#) was founded in 2008 as a health data transparency company and has since evolved into a full health navigation platform. Castlight now connects with a curated list of health and wellbeing vendors, benefits resources and plan designs to provide comprehensive support to their users. The company has approximately 200 customers, including PepsiCo, ArcBest, Ferguson and Westrock. Castlight now offers an even more personalized approach to support through its care guides which offer one-to-one live support to connect employees to the right benefits and care, combining personalized health navigation technology with clinician-led, high-touch service.

An employee from a large manufacturing customer recently leveraged care guide support to learn more about an adult wellness campaign email that she received. Castlight sends these messages to members who haven't had a primary care visit in more than a year. During their conversation, the care guide was able to uncover a number of struggles that this employee was facing. These included discomfort navigating the healthcare system as a primarily Spanish-speaking person, a much-higher-than-expected bill for a visit to her doctor, a persistent shoulder pain radiating into her hand, trouble sleeping and the recent traumatic death of a family member. All of this was accompanied by sky-high medical bills for her care and overwhelming feelings of sadness and grief. Over the course of several weeks, the care guide helped this employee tackle each issue. Ultimately from a simple phone call about a wellness program, the guide was able to advocate on behalf of this employee in her native language and help her take positive steps toward better physical, emotional, and financial wellbeing. This trusted and valued interaction ultimately provided a sense of social wellbeing for someone desperately in need of care.

[League](#) was founded in 2014 with a mission to empower people to live healthier, happier lives every day. League brings together all elements of health, benefits and wellbeing into a single open-architecture platform that employees leverage, using predictive data to help employees make meaningful behavior changes - what League calls their Health Operating System (HBX). They have hundreds of customers, including Uber, Unilever, Shopify and Lush.

We believe League will be quite a disruptive vendor as it builds out its data-driven open platform for insurance providers, wellbeing platforms, assessments, testing, and education. Clients view League as their "integrated health platform," which not only gives employees an integrated place to assess their health benefits and find the right provider, it also gives the company detailed analysis of provider costs, so the HR department can continuously refine and readjust providers.

[Limeade](#), founded in 2006, has evolved to an employee experience software company, unifying employee wellbeing, engagement and inclusion solutions. Limeade takes a "whole

person, whole company and whole ecosystem” approach to addressing physical, emotional, financial and work wellbeing. The company has approximately 175 customers, including ABB, Iowa State University, Allina and Puget Sound Energy. It leverages a proprietary wellbeing survey that informs relevant activities that are customized and personalized to the individual’s needs. The platform is easy to navigate and includes featured activities for all employees within a given organization as well as employee subsets (i.e., specific to different geographic segments), top activities for the individual that are served up based on history and what the platform learns as it goes, and finally resources that are “trending now.” In 2018, Limeade acquired the employee communications platform Sitrion, expanding Limeade’s employee listening and communication capabilities. These capabilities have become even more critical through the pandemic and during social unrest.

One customer, Iowa State University, was able to shift its focus in response to the pandemic with the support of the Limeade platform. Leaders and managers listened to employees and created space, support and resources to care for their people through this difficult time. They were able to utilize Limeade to reinforce their messages of care through weekly communications, sharing of resources and more. Here are a few specific examples of what ISU did to support the wellbeing of their faculty and staff, consistent with many of the trends we identified earlier:

- **More mental health support:** New mental health awareness training for all employees. An on-site counselor and regular written communications from a counselor via the Limeade platform.
- **More connection:** Creating small networks of support for employees (i.e., wellbeing Wednesday conversations) to listen to employees and encourage connections.
- **Leveling up childcare and family resources:** Conducting family forum discussions every two to three weeks for parents with school-aged children to connect and support each other. These discussions resulted in teacher-led pods, family swaps and other creative solutions.

[meQuilibrium](#) was founded in 2011 and based on 25 years of research on the key ingredients of resilience and how to boost the competencies that enable it. As a digital coaching platform, meQuilibrium helps people improve their ability to manage stress, to grow, prosper and succeed with life’s various challenges. The company has approximately 60 customers, including PepsiCo, Ford, Goldman Sachs and IBM. Like many aggregator solutions, meQuilibrium can point users to specific solutions that are relevant to their identified needs. Through its proprietary assessment, it creates a personalized skills journey for users and then deploys multiple support mechanisms that include cognitive behavioral therapy, AI and human coaching (through mentors and peers within an employer customer) and ongoing self reflection. Through the pandemic, meQuilibrium has continued to add and adapt solutions to address user’s needs such as dealing with uncertainty and easing loneliness in addition to supporting customers with return to workplace strategies and ongoing COVID response. meQuilibrium’s platform, insights, and dashboard afford organizations the opportunity to impact their employees’ resilience and boost their overall wellbeing.

One of meQuilibrium’s differentiators is the predictive nature of its analytics and identification of various risk factors across a company’s population (and subpopulations) such as productivity impairment, anxiety, depression and burnout. Such information has helped to inform customer’s people strategies, programs and service offerings. An employee from one of meQuilibrium’s customers in the financial services industry highlights personal benefits: “The app, in particular, has been wonderful—you can track things, add activities right to your calendar, and so on. I especially love having meditations right on my phone, and I really like the ‘Trap It, Map It, Zap It’ tool. Adding an entry is easy and causes me to think about the situation more as I write it. I can catch myself and then talk myself out of negative thinking. It really helps to look at a situation and say ‘Everything is not wrong. I am going into that negative mindset again. Let me stop myself and think about a solution.’ When I get the notification from meQ asking me how I’m feeling, I think to myself, ‘Am I really that stressed?’ and the answer, after some reflection, seems to be ‘no’ more often than not. I also am surprised that I usually feel more motivated than I thought.”

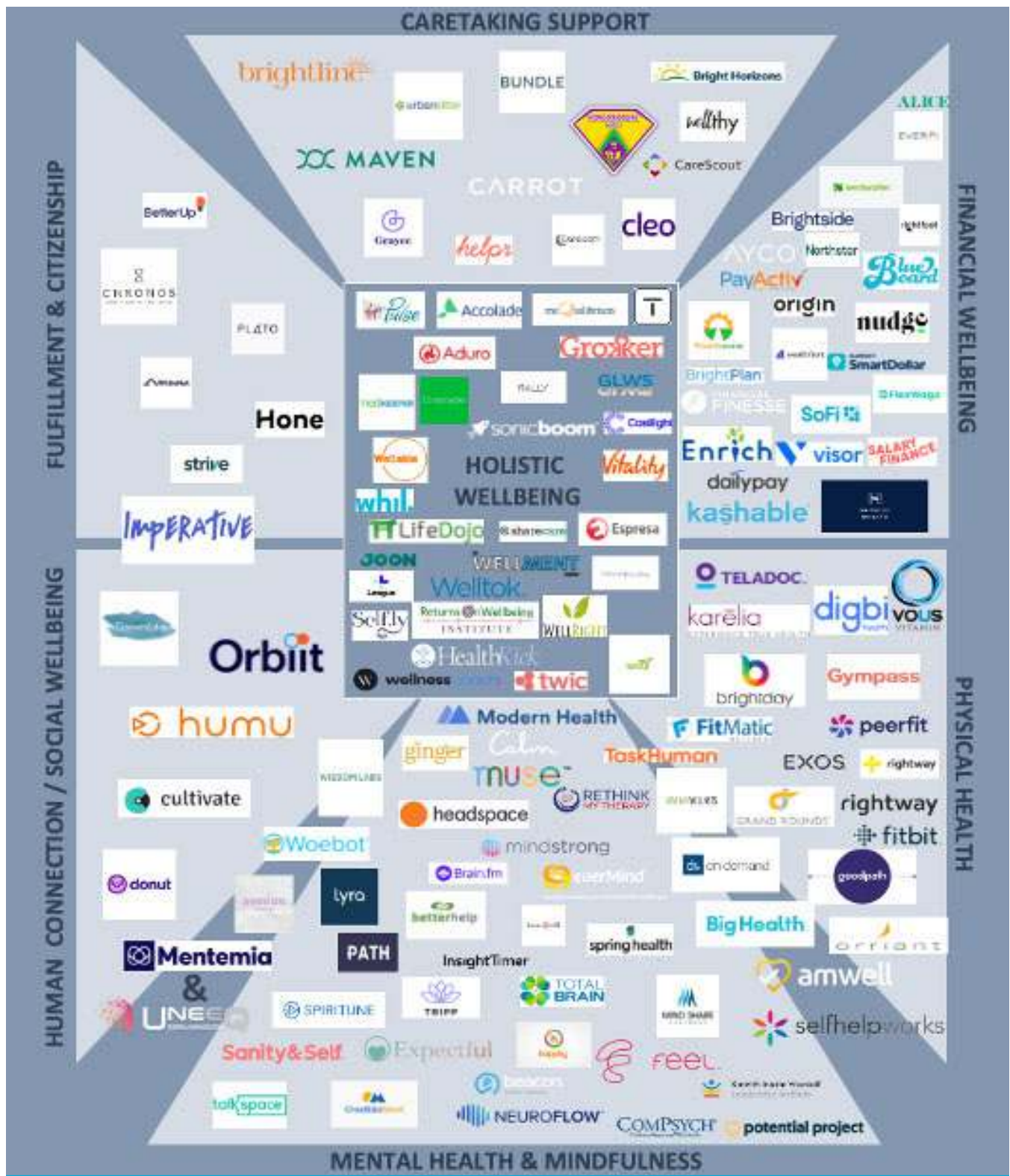


Figure 2: Representative Wellbeing Vendors

[Virgin Pulse](#), founded in 2004, is one of the long-standing providers of corporate health and wellbeing solutions, delivering total population and whole person care for better health and cost outcomes. Through Homebase for Health,TM Virgin Pulse helps employers' address critical health and wellbeing challenges through a single platform as individual members engage their personal "homebase" of digital health tools and resources, coaching services, and partner apps to build long-lasting healthy habits and reduce, manage, or reverse the impact of chronic conditions. Today, Virgin Pulse has over 4,000 clients including Northern Arizona Healthcare Corporation and Central Michigan University and is one of the largest solution providers in corporate health and wellbeing both by total number of customers and annual revenue.

One of its members, Daysha, began her journey in 2018. Daysha was unhappy, lacked energy, smoked tobacco, and was overweight. One email notification prompted Daysha to sign up, activate her Virgin Pulse account, schedule her first coaching session, and begin changing her life for the better. Daysha finally had the tools and resources to change what she did not like about her life, but the real resource that she credits with her biggest impact was VP Live Coaching. Within two weeks of enrollment, Daysha began her coaching journey that led to her quit smoking, lose weight, and improve her life outlook. Today, Daysha has a bubblier personality, has more energy in her daily routines, has been smoke free for more than a year, and has lost 70 pounds. Daysha in turn inspired and motivated her mother and brother to share in her journey with both quitting smoking and her mother losing 100 pounds.

Daysha's story is inspiring not just because of the goals she was able to achieve but because her engagement with Virgin Pulse changed her entire outlook on life. While Daysha had certain habits that she wanted to kick and certain aspects of herself that she wanted to change, her story demonstrates how the elements of wellbeing are interconnected, such as when different life outlooks impact habit development in smoking, weight gain, and lethargy. Daysha's journey with her coach not only built good habits but changed her entire life outlook, giving her back her energy and her zest.

Other Holistic Wellbeing Vendors:

[Accolade](#) offers various programs that aim to increase employee engagement with benefit programs, guiding employees to their best care providers and improving a population's health while reducing healthcare costs. The company provides access to health assistants and nurses for questions regarding bills, coverage, or general health.

[ADURO, Inc](#) describes itself as a provider of a human performance approach to wellbeing. Its platform supports a client's employees in six interrelated aspects of life. These aspects include lifestyle and health, mindset and resilience, money and prosperity, development and growth, relationships and community, and purpose and contribution. The company also offers coaching, interactive content and peer-to-peer connections on its digital platform.

[Espresa](#) was founded in 2015 by Alex Shubat and Raghavan Menon. The company is a culture benefit SaaS platform and mobile application for administering employee engagement programs. The platform offers rewards and recognition, employee resource group support, wellbeing and fitness, meetups and events, reimbursements and allowances, and challenges. The platform is modularly based, with most clients starting out with a single module and adding additional modules as they grow. Espresa is currently working on ways to improve the employee experience even further. It is continuing to onboard new wellness providers and fulfillment partners to allow for more options for HR and people teams. Clients include Tesla, Nationwide, and ServiceNow.

[GLWS](#) offers evidence-based virtual and in-person solutions to leaders in order to achieve one or all of their four goals. The goals include understanding wellbeing in a practical way, promoting and enabling wellbeing for those that they lead, model high levels of self-care, and provide cost effective resources for rollout across the organization. The company distributes a GLWS survey to each of its clients to understand both the positive and negative drivers that affect leaders' wellbeing and that of their teams.

[Grokker](#) was founded in 2012 by Lorna Borenstein after she became frustrated by the lack of high-quality instructional wellbeing videos available. The company is built on five pillars

of engagement: personalization, video, expert guidance, motivation and community. Its video collection offers selections on fitness, nutrition, mental health, sleep and financial wellbeing.

[Healthkick](#) was founded by Erika Zauner, a former finance professional who experienced a one-size-fits-all wellness program that she felt didn't benefit her. The company offers a personal wellbeing hub, a digital wellness wallet, challenges and experiences, and a wellness concierge. Clients also work with a dedicated account manager who will act as an extension of their wellness teams.

[Joon Wellness](#) was founded by Sebastian Elghanian and Jonathan Shooshani with a goal of helping organizations show their people that they care. The company offers a customizable platform with the following wellbeing categories: work from home, health and wellness, food and groceries, learning and development, student loan repayment and family. Users can choose any vendor within any category and the company's algorithm will automatically approve and reimburse eligible transactions, encouraging users to self-direct their wellness benefits.

[LifeDoJo](#) is a platform that utilizes behavior change theory to help individuals make lasting changes within their lives. The company engages employees around the following topics: healthy eating, exercise, stress, the science of happiness, sleep, smoking cessation, and financial skills. Some of their clients include Airbnb, GoodYear, and Adobe. This platform allows clients access to 24/7 health coaching with individuals certified in behavior change. Each program implementation from this company follows the same four steps: pre-launch, motivation, choose a habit, make it stick. This process is meant to produce sustainable behavior change as it encourages small yet effective changes.

[Medikeeper](#) was founded in 2003 as a way to allow patients to access their personal health information in a secure way. It is now a tech company which designs customizable portals for its clients. These portals allow employers, benefits providers, health plans and wellness companies to manage corporate health. It has three offerings: a health risk assessment, a wellness portal, and an enterprise health portal.

[Rally](#) offers four different solutions: Care, Well, Coach, and Reward. The Care solution is about reducing complexity of healthcare, easing access and lowering costs. The Well solution supports wellbeing through everyday engagement. The Coach solution helps individuals better themselves, whether through self-directed online learning, personalized weight loss or supporting health changes that can reduce risk of chronic disease. Lastly, the Reward solution motivates individuals at every step of their health journeys with relevant incentives.

[Returns on Wellbeing Institute](#) was founded by Jim Purcell after he retired as CEO of Blue Cross & Blue Shield of Rhode Island in 2012. The company facilitates high employee participation in focused programs which lead to higher employer returns. It focuses on where healthcare claims are coming from - the chronically ill and those at risk of becoming so - both areas in which lifestyle change can reduce chronic illness claims. It also highlights financial wellbeing, focusing on short-term needs and putting more money into lower-paid employees' pockets by reducing their expenses.

[ShareCare](#) was founded in 2010 by Jeff Arnold and Dr. Mehmet Oz. Their goal is to simplify, improve and transform the digital health experience. The company offers a comprehensive platform that allows people to go from assessment to action, with the help of personalized information, evidence-based programs, benefits, community resources and health services. It utilizes coaching and partner programs to help users manage all aspects of their health. The following features come standard for each individual client: a proprietary health risk assessment (Real Age Test), digital coaching, access to a content library of clinically validated articles, healthcare search support via Find-a-Doctor, a personal health record, AI to help personalize the experience, and a financial wellbeing assessment. From there, the company also has additional services beyond its digital platform. It offers programs covering lifestyle management, disease management, tobacco cessation, unwinding anxiety, COVID return to work, maternity and family management with Ovia, Quest Diagnostics on-site screenings, and diabetes prevention.

SELF.LY was founded by a healthcare journalist who experienced a personal wakeup call about prioritizing her sanity and health. Self.ly is a “lifestyle platform, digital resource and supportive community dedicated to making self-care simple and accessible for busy executives, entrepreneurs and business leaders.” The company provides information on industry trends, advice and tips for how to avoid burnout and foster one’s own emotional, physical, and psychological wellbeing. It also provides a 10-week burnout solution program, complete with coaching, mental health assessments, guidance through cognitive behavioral therapy (CBT) activities and access to an online support community. In addition, Self.ly publishes a quarterly magazine designed to help individuals develop their own self-care routine to combat burnout and become sustainably high performing.

Sonic Boom was founded in 2007 by Danna Korn and Bryan Van Noy because they were frustrated with the lack of participation in corporate wellness programs. Sonic Boom’s wellness programs offer an engagement module, incentive management, and clinical measurement tools. It focuses on social connection with gaming mechanics as well as customization and segmentation as a few of their key differentiating factors.

Sprout was founded in 2012 by Martha Switzer and Christina Ford after their experiences with employee burnout in Fortune 500 companies. The company was created with the commitment to focus on simple, consistent routines that will help individuals feel better, more energized and happier. Its mobile platform uses a gamified approach to wellbeing by identifying and rewarding healthy behaviors. Social connection and collaboration with colleagues are encouraged, as social engagement aids in making lasting behavior change.

The Wellment Company focuses on three specific elements of wellbeing. First, Care focuses on personal wellbeing. Second, Community is about building relationships and understanding others around you. And lastly, Meaning focuses on living out personal and organizational values in the world. The company delivers weekly video challenges that are tailored to its clients’ employee demographics.

Thrive Global was founded in 2007 by Arianna Huffington after she suffered a personal collapse from sleep deprivation and exhaustion due to overworking. Offering a variety of programs, Thrive Global works to improve work performance, mental resilience, the onboarding experience, working parenthood and workplace culture. It focuses on doing this through data-driven storytelling and offer clients the opportunity to “be the chief wellbeing officer” of their own lives.

TIGNUM teaches tactical and pragmatic solutions to build team members’ performance habits on three levels. The first level is performance that supports your body systems so that an individual can boost their immune system and solve muscle imbalance. The second is habits for daily challenges, providing mental models for solving problems, recovery plans for fatigue and more. And the third is habits for peak moments, helping individuals identify critical events and create detailed debrief plans.

Twic offers its clients accounts for various benefit areas, including wellness, rewards, lifestyle, HSA, FSA, HRA and commuter. The company aims to allow employers to offer diverse options that are tailored to their employee demographics and employees to select even more personalized benefits. Through partnerships with vendors, Twic offers discounts to products and services. They also feature a Twic card for employees of clients so that they might reduce some of the anxiety that usually surrounds reimbursement claims.

Vitality Group has a mission to make healthy choices the easiest choices. It offers a behavior change solution with three different options: Vitality One, Vitality Elevate, and Powered by Vitality. Vitality One is focused on bite-sized habit formation for a workforce on-the-go, designed with incentives to sustain engagement. Vitality Elevate is tailored for a more traditional workforce, focusing on overall health status. Powered by Vitality is targeted towards companies looking to retain employees through an emphasis on health.

Wellable, founded in 2013, offers direct integration with leading consumer wellness apps and wearable devices. Its wellness experiences are customizable to address the specific needs of an organization and its people. The company offers each client access to a wellness account manager who

leverages best practices, research and lessons learned from other clients to make sure programs put in place are set up to succeed. A bulletin board is created for each client as a space where its leadership can broadcast what challenges are happening when, as well as what incentives might be involved. As data is collected, Wellable analyzes and publishes the results to provide insights for clients.

[Wellness Coach](#) is a digital wellness platform that provides coaching and tools for mental, physical, social, and financial wellbeing. Its app offers new on-demand practices, replays of past live community classes, courses for stress, resilience and leadership, bedtime stories and guided sleep practices. It also provides users with customized usage reports and custom wellness challenges. There is both a free and paid version of this app that companies can provide for their employees.

[WellRight](#) is a Chicago-based wellness platform company that strives to help employees uncover why they want to be healthy. Their program is entirely customizable and built to meet employees where they are. Employees have access to gamified challenges, meaningful rewards, and unlimited free coaching to stay motivated. Employees start out with a biometric health screening to establish a baseline level of health. These can also identify areas of focus for preventative health care going forward.

[Welltok](#) aims to motivate individuals to take an interest in their physical, mental, social and financial wellbeing through proprietary data and advanced analytics. The company offers a database of determinants of health, machine learning analytics, personalized engagement, high level privacy and security, and deep expertise in healthcare systems. It offers solutions for increasing retention, closing gaps in care, adhering to medication plans, and total wellbeing. Clients include Aetna, Chipotle, Magellan Healthcare, and Spectrum Brands.

[Whil](#) was founded in 2014 by Joe Burton, former president of Headspace. Whil develops digital training programs to help people improve their mental wellbeing, performance, relationships and sleep. Many of their programs are activity-based and fit into two groups: mindfulness and wellbeing and performance and relationships. Some examples of programs include learn to meditate, take one-minute breaks, build emotional intelligence and thrive at work.

Fulfillment and Citizenship Vendors

There are many solution providers that get at various elements of fulfillment, but broad-based fulfillment “providers” or more appropriately “enablers” are scarce in the market. For example, there are coaching providers such as BetterUp and Coach Source and learning and development curators such as Cornerstone on Demand and LinkedIn Learning. Using assessments, StrengthsFinder helps identify strengths and then helps us understand how to better leverage those day to day. The market includes many consultants who can help to develop a clear organization/team vision and mission as well as leadership development vendors focused on grooming next-generation leaders. Strive and Hone are interesting entrants into this segment. All help to enable employee fulfillment through different facets of learning, coaching, increasing self-awareness and connecting to a higher purpose. That said, few vendors explicitly get at the core of bringing all of these elements together in a way that enables individuals inside organizations to be more fulfilled in their day-to-day lives, including outside of work.

One organization with a platform cuts across two key wellbeing categories - fulfillment and human connection/ social wellbeing — is [Imperative](#), which was founded in 2019 with a mission to empower everyone to be fulfilled at work and in life. Its peer coaching platform helps to increase engagement and wellbeing of employees by facilitating meaningful conversations focused on specific actions that hold peers accountable for their own engagement and growth. Its platform and approach helps to build cross-functional relationships, and reduce the burden on managers (as well as HR) by uncovering personal insights as peers engage with one another in a 1:1 setting. No coaching certifications or prep required is required of users; the platform guides participants to get to know each other and support one other through inquiry and insight. One of its core key differentiators is the social accountability its platform enables greater employee engagement and fulfillment. Imperative has over 25 customers, including Zillow, Casper, and Boston Scientific.

One customer, Code for America, had a peer coaching participant who experienced a change in her role due to COVID-19. Now working independently, she was feeling

isolated and less connected to the organization and had lost a sense of purpose. With guidance from the Imperative platform, her peer coach helped her organize her thinking, reflect on the core issue, and ultimately take action. In short, she figured out what she needed to do and built up the confidence to do it. “It’s reignited a little bit of fire that’s been missing for a while,” she said. Peer coaching “helped me walk away knowing what makes work meaningful for me,” she added. “It helped put things into perspective and focus on the positive.”

Other Vendors Addressing Fulfillment and Citizenship

[BetterUp](#) uses behavioral sciences to create their approach for organizational transformation. They aim to increase productivity, agility, resilience, retention and engagement. Its platform has three key components: Identify, Transform and Measure. Coaches help to identify who in the organization will benefit most from coaching. These individuals can take self-assessments to create their personalized plans for lasting behavior change. BetterUp then provides analytics on individual behavioral outcomes and also organizational-level impact.

[Chronus](#) is a mentoring platform that was founded in 2007. It aims to help individuals expand career options, develop skills and gain job related knowledge. When a client joins Chronus, they follow along the company’s process of enroll, match, guide, measure and grow. The company offers training and technical support for client’s program administrators and also coaches them on piloting and launching any Chronus-based programs.

[Hone](#) is a leadership and people skills platform that offers live training solutions. Live training is featured due to its ability to allow for practice, feedback and social learning. Honehq allows for rollouts of global training or individual selection for a few classes, depending on what goals the client company has. Some examples of classes offered are: Overcome Resistance to Change, The Dangers of a Culture of Conformity, and Ask Powerful Questions.

[Plato](#) is a platform where individuals can customize their learning experiences. PlatoHQ has a network of mentors that clients can choose from in areas like problem solving, continuous improvement, career advice and unknown unknowns. The company brings in mentors from some of the following companies: Eventbrite, Lyft, Medium, and SurveyMonkey. The company offers options such as 1:1 meetings for short-term issues, live Q&A, and long-term mentors.

[Strive](#) aims to transform managers into leaders through its training solution. The company offers a social learning platform built on the concept of learning by doing. Strive has a learning cycle that they utilize that starts with reflection and a self-assessment, moves to absorption and traditional learning, continues with practice in Zoom-based classes, and ends with application challenges.

[Whitehat](#) is a tech startup designed to accelerate careers and develop a diverse group of future leaders. The company aims to ensure that young people have access to career-focused apprenticeships. Whitehat works with companies such as Warner Bros, Google, Expedia and Facebook. Whitehat offers apprenticeships in areas such as accounting, IT support, business administration, software engineering, and project management.

Human Connection/Social Wellbeing Vendors

Human connection received a deluge of attention in 2020 as employers worked hard to combat the effects of social isolation and the significant reduction in face-to-face interactions that enable social wellbeing. Even in a virtual, work-from-anywhere world, human connection can be strengthened through intentional approaches, and some wellbeing providers in this category offer a continuum of solutions. Convers(ate) focuses on guiding meaningful conversations, the key ingredient to human relationships. Sidekick provides “always on” displays, enabling teams to be “present together” throughout their workday, virtually, as if they were in the same room. Following are examples of vendors addressing some facet of social wellbeing inside organizations.

[Cultivate](#) was founded in 2017 out of the co-founders' curiosity and interest in defining relationships via the written word (emails, texts, IMs) so that they could help managers improve team member connections and communications. Through personalized AI-coaching - without the use of traditional surveys and user feedback - leaders receive continuous feedback from the Cultivate platform. This feedback includes observed behavior via digital channels like email and chat in order to help managers strengthen their workplace relationships. Cultivate passively models an employees' specific needs and then offers tailor-made insights, coaching and smart tools to their managers in order to help improve overall team member communications. Cultivate is early in its lifecycle with only 20 enterprise customers, but these include some larger enterprises such as SAP and McKesson.

Cultivate's biggest differentiator is its ability to deliver personalized coaching on "observed behavior," working passively behind the scenes. Through this coaching and behavior adaptation, customers have seen improved relationships between managers and their employees. One customer, Andy Harrison, senior director of leadership development at McKesson, said, "Cultivate has been a very engaging development tool for us, providing unique insights for our people leaders on their workplace relationships, which is tremendously important at a time when team effectiveness is critical to the new workplace." Managers at McKesson who actively use Cultivate give 90% more recognition to their direct reports and over 80% report better self-awareness of how they treat their teams, which includes insights on behaviors like after-hours messages, responsiveness, and sharing opinions.

[Wisdom Labs](#) was founded in 2013 with a goal to address rising stress, anxiety, and loneliness in the workplace, using the science of mindfulness, resilience, and compassion. Wisdom Labs' Wise@Work product suite uses peer-to-peer mindfulness and resilience training to build healthy working habits for employees. Many of its meditation practices revolve around work, which is a unique focus among meditation apps. In light of its approach, we see their solution falling into two areas of wellbeing - human connection/social wellbeing and mental health.

During the pandemic, Wisdom Labs expanded its platform content to include a focus on crisis management and diversity and inclusion in response to the ongoing effects of the pandemic and socio-economic environment on employees. Customers include LinkedIn, Salesforce, Merck, Intuit, and The Kauffman Foundation. A clinical researcher from Merck commented, "Wisdom Labs provide evidence-based teachings and high-quality guided mindfulness meditations. In a survey we conducted in 2017 among participants of our weekly community meditations, 96% of the responders reported benefits. Most common benefits were reduced stress, more positive mood, and being less reactive."

Other Vendors Addressing Human Connection/Social Wellbeing

[Convers\(ate\)](#) is a company built to spark conversation. The company was launched on Kickstarter in 2017 by Mollie Khine and Taylor Buonocore Guthrie. Its main product is a box set of cards with conversation topics. It comes with guidelines for how to have meaningful and productive conversations, including tips for facilitating. It also comes with takeaway cards for individuals to capture their personal insights during the conversations. Some topics included in the set are family, generosity, failure, endurance, food, time and differences. Convers-ate also offers keynotes and facilitated workshops.

[Donut](#) is a platform that aims to allow coworkers to connect virtually, regardless of where each individual is physically situated. The company offers intros via Slack for co-workers that have never met as well as a virtual watercooler to recreate the office environment of casual conversation. For the watercooler, Donut posts topics that inspire conversation and friendly debates between coworkers. Some companies utilizing Donut's services are Netflix, Okta and Revunit.

[The Foundation for Art & Healing](#) is a non-profit that uses arts and expression to primarily address loneliness through its signature initiative called [The UnLonely Project](#). It offers strategic consultation and program support to HR professionals to customize and deliver a portfolio of awareness campaigns, intervention activities and measurement strategies. Programs include group workshops and events

for the workplace to help employees feel less lonely through creativity and connection. Offerings not only support human connection and social wellbeing but can also help address mental health.

[Orbiit](#) is a virtual networking platform helping managers connect members for 1:1 conversations. The company started in 2018 as a job shadowing marketplace for peer-to-peer connection across companies and industries. Now, it offers a space where people within an organization can get connected with people that they might not normally have a chance to connect with. The artificial intelligence-powered platform matches people based on goals and experiences.

Technology for Human Connection

Can AI replicate human connection in a way that supports our wellbeing? People do interact with their Google Nest, Apple Siri and Amazon Alexa as if they were at times somehow human. Even back in 2018, [this Fast Company article](#) underscored this relationship. According to the report that this article references, Google surveyed more than 1,600 voice assistant owners and “41% of folks who have such a system say that using it feels like talking to a friend, or at least another person.”

While we question the degree to which AI can truly replicate meaningful human connection in order to nurture our social wellbeing, there are modern-day technology solutions that seem to be having a positive impact in this realm, even though their focus may primarily be on supporting other aspects of wellbeing like mental health. Vendors such as [Woebot](#) are supporting mental health at a time when demand and need is at its highest and at the same time seem to be enabling a degree of human-like connection through its AI-powered CBT chatbot. Woebot was founded by Alison Darcy, a Stanford-trained clinical research psychologist. The Woebot phone app aims to help individuals reduce stress, discover patterns in their moods, and live happier through brief conversations and check-ins, as the app is available “to talk” at any time day or night.

Similarly, digital human company [UneeQ](#) recently announced a partnership with mental wellbeing platform [Mentemia](#) to create a unique digital human mental health coach.

UneeQ's intelligent Creator platform enables the design and build of interactive experiences through digital humans. It helps organizations create real-time, human-like conversations that are more accessible and engaging with users and customers. The Mentemia workplace wellbeing platform was created by rugby legend and long-time mental health advocate Sir John Kirwan, tech entrepreneur Adam Clark, and a team of medical expert advisors. Primarily delivered through an app, Mentemia provides employees practical tips and techniques to help them take control of daily stressors and their overall mental wellbeing. UneeQ enabled the design and build of a human-like Digital John Kirwan (or DJK), who will be available to talk to and guide people who need mental health support. This collaboration allows Mentemia to expand its mental health platform and provide personalized care and wellbeing tips to users wherever they may be.

Financial Wellbeing Vendors

In a December, 2018, pre-pandemic survey of mid-sized and large U.S. firms, [the Financial Health Network uncovered these key insights](#):

- Less than one-third of employees report having access to any given financial guidance benefit, even though a majority of employees express interest in these benefits.
- Emergency savings benefits from employers are still rare, with only 23% of employees indicating that they currently have access to an employer match for emergency savings. Yet emergency savings is the most in-demand benefit of any offered in the survey, with 61% of employees expressing interest.
- Debt-related benefits are of interest to employees across the income spectrum – even higher-income employees want support for managing their debt. Yet less than 20% of employees say that they have access to any given debt or credit benefit.
- Nearly three-quarters of employees say it's important that employers offer financial wellness benefits, but few have access to holistic options – highlighting the opportunity for employers to differentiate themselves.

With this backdrop, we explore here a number of vendors looking to address these very needs.

[BrightPlan](#) was founded in 2016 after its founder (Marthin De Beer) experienced a financial gap in the marketplace (up close and personal) after his wife suddenly fell ill and he decided to take a one-year leave of absence. His desire - born out of his experience - is to address the universal need for financial wellness, which led to today's BrightPlan digital platform in partnership with experienced financial advisors who actively work with employees on their financial plans. Their offering is based on four pillars that include education (Learn), a roadmap (Plan), savings (Invest), and finally money management (Manage). Brightplan has over 30 customers, including Synopsys, Ellucian and Pure Storage. Brightplan is the first digital advisory company certified for fiduciary excellence by the Center for Fiduciary Excellence (CEFEX).

One customer - a 5,000 employee technology company headquartered in California - leverages BrightPlan to provide broad financial support for all of its employees, addressing the diverse needs of both long-tenured/retirement age as well as early career employees. This customer employed BrightPlan's full spectrum of solutions, including both digital coaching and face-to-face personal financial advice. An employee of this customer was already actively managing his day-to-day finances, but found manually updating excel spreadsheets stressful and time consuming. The employee was also struggling with advanced questions such as figuring out the right balance between paying off debt and investing, asset allocation on his 401(k), and whether to contribute to a Traditional or a Roth 401(k). After hearing about BrightPlan through his employer, the employee signed up. BrightPlan automated the way he analyzed his day-to-day spending and how he managed his financial goals. The employee also took advantage of the access to financial advisors. After working with one, he made significant changes to his long-term goals in order to get them on track. In addition to taking advantage of the digital platform and access to financial advisors, the employee regularly attends BrightPlan's educational sessions to increase his financial literacy. He continues to partner with BrightPlan on his personal financial journey.

[BrightSide](#) was founded in 2017 to support better financial health for employees. The company considers its solution a "financial care platform" that makes paychecks go farther, making it also easier for employers to protect their employees and reduce employees' financial stress. Brightside's holistic solution drives user engagement by being a single point of contact for employees, presenting options and offering partner products and solutions that employees can't find elsewhere. Since 2018, Brightside has helped thousands of families save an average of \$1,200 a year, improving emergency savings and reducing debt. Employers whose average employee makes less than \$100,000/year is its ideal target today, but the company has plans to expand its solutions and impact more broadly in the future. Brightside is a young company with approximately ten customers, including Accolade and BJ Services.

Brightside's approach is to build long-term, engaging relationships with employees in order to drive both employer ROI and employee financial health. A call center employee at one customer found immediate value after just one initial conversation with a Brightside financial assistant. The financial assistant learned that the employee's mother had stolen her car, and she couldn't afford her children's daycare any longer after losing her second job as a driver. She was now unable to get to work and had a subprime credit score. The Brightside financial assistant was able to navigate the employee to her EAP program for support on the relationship with her mother, helped the employee get a no-credit-check loan to buy a used car that the financial assistant researched ensure it was in her budget, and then did research on daycare in the neighborhood identifying a local scholarship program that saved the employee \$400 a month for daycare expenses. The employee was able to return to work with her new used car and with her children back in a daycare she could afford. She then started saving in a Brightside savings account to be better prepared for any future emergency after having paid off the loan.

At first glance, [Blueboard](#) might seemingly be misplaced in the category of financial wellbeing, but its approach to rewards and recognition is consistent with years of [research from organizations like Gallup](#) that shows we get a higher boost in our wellbeing when we spend money on experiences versus

material things. Blueboard was founded in 2014 as a rewards and recognition platform to help deliver thoughtful recognition through personalized and curated experiences for employees, unlike competitors which leverage cash and gift cards to reward employees. Its big differentiator is their continued investment in the ability to deliver a personalized experience to anyone, anywhere, focusing solely on experiential rewards. Today, Blueboard has approximately 200 customers including Abbott, USI and The Trade Desk.

Customers like Tradeshift are sharing stories, photos and feedback from employee experiences to build stronger connections while employees are working remotely. Before COVID-19, Tradeshift employees were primarily redeeming their Blueboard rewards for unique travel adventures, creating priceless memories and once-in-a-lifetime experiences. Today, employees choose from a menu of both in-home experiences (from mindful leadership coaching to virtual calligraphy lessons) and out-in-the-world adventures (from kayaking trips to bouldering lessons to getting PADI-certified in Mexico). The company's menu of curated adventures are designed to cultivate wellbeing - whether in the form of indulging a passion, challenging one's comfort zone, or fostering quality time with friends and family. Kaylan J., an employee at Tradeshift, commented, "I don't even want to think about what life would look like without Blueboard. I'd probably be trying to manage different reward amounts, handling cash in multiple countries, working with finance, and it would be such a mess. Blueboard has made it so much easier."

Other Financial Wellbeing Vendors

[Alice Financial](#) was founded by Avi Karnani and Paul Barnes-Hoggett. Employers connect their payroll and enable Alice as their benefits administrator. Alice connects with employees via email, text, Facebook, Instagram and Slack. Employees connect their own bank cards so that Alice can identify pre-tax eligible expenses. Employees will receive text messages to confirm their expenses or answer questions to stay compliant.

[AYCO](#) is a Goldman Sachs company that was developed by Bill Aydelotte in 2000 around the concept of fee-based financial accounting. Its digital platform offers employees financial

counseling services for each career stage such as coaching of personal finances and longer-term planning.

[Daily Pay](#) is an on-demand pay platform that delivers early access to earned wages and works with all HR/HCM/payroll systems. It was founded in 2015 by Jason Lee and Rob Law, a financial advisor and engineer. Its Payex platform allows users to access their earned income before payday, send their wages straight to savings, receive bonuses and incentives, and receive off cycle payments.

[Enrich Financial Wellness](#) was founded in 2009 and is a financial wellness platform. It offers interactive courses, budgeting tools, retirement modeling and more. Users get personalized dashboards where they can view their action plans. This platform is mostly sold to financial institutions, employers, and colleges.

[Everfi](#) is an edtech company that offers education around key life skills. Financial literacy and education is a primary focus area but other wellbeing topics include health and mental wellness, digital wellness, and social emotional learning. The company also provides access to a variety of networks and coalitions, including its Financial Capability Network (FCN) which is a coalition of over 750 financial institutions committed to improving the financial capability of consumers and communities.

[Financial Finesse](#) is a financial wellness company founded by Liz Davidson. Its program offers a benefits-integrated online platform, unlimited access to personal CFP professionals, employee assessment and workforce analysis, and live interactive coaching engagements. Client companies also receive an ongoing program concierge to monitor the program's success.

[FlexWage](#) is an app for budgeting and financial support. Users receive a starter budget, daily prompts to build confidence and access to financial coaching. The company focuses on helping its users cover their day-to-day expenses, put away 10% of their income for retirement, and have a cushion so that they can have the occasional indulgence.

[Harness Wealth](#) was founded in 2018 by David Snider and Katie Prentke English. It is a financial wellness platform that

offers financial, tax and estate advisers to deliver financial education to their clients. Users identify their opportunities and risks as they set up their own personal program. The company's algorithm then matches users with financial services and specialists to best help them achieve their goals.

[Kashable](#) provides low-cost loans for employees. It has partnered with many HR platforms and benefits administration systems so that they can be easily added to a company's benefits portfolio. Kashable gives employers the opportunity to reduce loans, supplement health plans, alleviate financial stress and provide a financial safety net for their employees.

[Nerdwallet](#) is a free service that provides financial tools and advice to consumers. It offers advice on credit cards, investing, insurance, student loans, mortgages, personal loans and savings. Individuals who have a Nerdwallet account can receive alerts to track their cash flow, find out how to get the most out of their current credit cards, and get insights into how they can save more going forward. An important key disclosure is that their partners compensate them. This may influence how products are reviewed (and where those products appear on the company's site), but Nerdwallet claims this does not affect recommendations or advice and that partners cannot pay them to guarantee favorable reviews of their products or services.

[Northstar Money](#) was founded in 2016 by Will Peng and Matt Matteson on the belief that you shouldn't need money to make money. The company gives unbiased financial advice, access regardless of background, and simple explanations of complicated financial topics. Clients get a dedicated CFP to help develop a step-by-step plan to understand the tradeoffs between daily finances and long-term goals.

[Nudge](#) was founded in 2013 by Jeremy Beaumont and Tim Perkins. It is a financial wellness company that utilizes data and behavioral science to help people understand and manage their money better. Users receive access to a personalized financial social feed complete with money management tools. They educate on multiple areas of money, including budgeting, children & family, debt and borrowing, divorce and separation, holidays and travel, insurance, investing, life after work, mortgages, pension, and savings and tax.

As the name implies, the company uses behavioral nudges built on behavioral science to change behaviors for a healthier financial life, and include social recognition, sharing of insights and gamification into the (sometimes dry) area of financial wellbeing.

[Origin](#) was founded by Matt Watson and Joao de Paula. They set out to provide financial planning for employees to help them reach their financial goals by providing advice, resources and tools. Users can see all of their accounts on Origin's platform and are guided by Origin advisors as they build their own financial journey. Clients include Nextdoor, Modern Health and Fuze.

[PayActiv](#) is a financial wellness company that was founded to level the playing field for lower-income workers who struggle with 'between paychecks' cash flow timing issues. It offers a financial wellness platform, earned wage access and payroll cards. An employer portal is available to clients to offer cash rewards, give employee recognition, run employee surveys, and measure results with data-driven reports.

[Rightfoot](#) is a financial wellness program for student debt repayment. It takes care of student loan data partnerships, banking partnerships, and student loan servicer partnerships to facilitate student debt repayment. Clients include Stanford University, New York Magazine and Lightspeed.

[Salary Finance](#) was founded in 2015 by Aresh Sarkar when he had a personal experience with a friend in crippling debt who had no access to anyone for help understanding finance. The platform focuses on the lack of employee savings that often stems from high levels of high interest personal debt. Their users pay down their existing debts by replacing them with a single, low interest loan that is repaid directly from their paycheck.

[SmartDollar](#) is a financial wellness company that aims to help individuals reach true financial wellness. The company defines this as sticking to a budget, having a fully funded emergency fund, holding no debt and having planned for retirement. It does this by providing step-by-step plans for their clients, focusing on one goal at a time. A dedicated client services team creates tailored promotional materials and contests to keep employees engaged.

[SoFi](#) was founded in 2011 by Stanford business students. Originally that platform used an alumni-funding lending model to connect graduates with alumni in their community. It now has a goal of helping its members reach financial independence. The philosophy includes the following elements: attack debt with a plan, always have a safety net, put your money to work and save for retirement.

[Visor](#) is a financial company that files taxes for their clients. It uses machine learning to identify deductions that help advisors understand how to maximize a client's savings. Users have to answer a few questions, upload some financial documents through their secure dashboard and then advisors take over from there.

[Wealthfront](#) aims to optimize finances and take the work out of banking, investment, borrowing and planning. Users deposit their paychecks and then Wealthfront's software decides what the best financial move is for their money. With its Self-Driving Money function, the software can top off an emergency fund, pay bills, or make direct investments.

Physical Health Vendors

A growing number of vendors have been focused on physical wellbeing for a long time. Some vendors such as Big Health and TaskHuman have expanded focus to encompass other areas of wellbeing as well.

[Big Health](#) was founded in 2011 after its CEO recovered from insomnia using a self-administered cognitive behavioral training protocol and decided that more people should have on-the-ready, lower friction access to this type of help. Big Health's first two products, Sleepio and Daylight, are designed to manage symptoms of poor sleep, anxiety and worry by delivering cognitive and behavioral techniques. Sleepio is backed by 55 peer-reviewed clinical papers including 13 randomized controlled trials, one of which showed Sleepio is effective in helping 76% of poor sleepers achieve healthy sleep. Similarly, Daylight is a digital therapeutic for worry and anxiety and was developed in collaboration with leading experts from Boston University, UCLA, and UT Austin. Daylight has two published clinical trials. Big Health has more than 50 customers, including Home Depot, Target and Google.

[TaskHuman](#) was founded in 2017 out of its founder's desire to make 1:1 wellness coaching more accessible via mobile technology. Its mobile app offers 1:1 sessions with live wellness coaches via video call. TaskHuman coaches address a wide range of wellness topics, including exercise, sleep, meditation/ mindfulness, parenting, stress management and more. TaskHuman has more than 25 corporate customers as well as a growing base of direct consumers. Enterprise customers include Purdue University, Medidata, Twic and TrueCar. One of TaskHuman's differentiators is the instant access and engagement it provides to live coaches in a 1:1 setting.

One enterprise client, BTS, is a consulting firm that is offering the TaskHuman app to 300 of its employees. Since launching TaskHuman, BTS has seen 55% engagement, with the average user making over seven calls to TaskHuman coaches, totalling over three hours of coaching per caller. Some of the most popular topics that BTS employees pursue with coaches are strength training, yoga, and weight loss. BTS has seen many individual success stories since launching TaskHuman, including its COO, Todd. Since being introduced to TaskHuman, Todd has reprioritized his health, become more flexible, improved his posture, increased his energy and overall, feels better than ever. He now uses the app daily to support his personalized needs. Todd recounts, "I had a 20-minute break between meetings, so I actually did some stretching and foam rolling with one of the coaches." TaskHuman has made coaching more accessible to Todd and many other BTS employees.

Other Physical Health Vendors

[Amwell](#) is another telehealth solution that provides the implementation services, marketing, analytics, and user support for clients. The company offers direct-to-patient modules and provider-to-provider modules. It supports many use cases, including urgent care, pediatrics, telestroke, population health management, telepsychiatry and chronic disease management.

[Brightday](#) is a software application that aims to help users improve their posture. The app uses artificial intelligence and augmented reality through a user's webcam to teach people

better posture habits. Posture is important for many aspects of life, such as reducing pain, looking taller, staying focused longer and having more energy. Corporate customers include Airbnb and People Tech Partners.

[Digbihealth](#) is a gut microbiome and genetic risk-based precision care program. It uses AI with the evidence-based science of gut microbiome, genetics and behavioral therapy. Its main program, Digbi Cares, is a four-month gut biome and genetics-based program for weight loss and the reversal of obesity related illness.

[Doctor on Demand](#) offers virtual healthcare visits. The company has doctors, psychologists, therapists, psychiatrists and medical experts available on demand. From urgent care and behavioral health to preventative health and chronic care, this platform aims to address the full mind and body health needs. This service is available across the U.S. to individuals with and without insurance. Clients include companies like Forbes, Time, and Elite Daily.

[EXOS](#) was founded in the late 1990's with the idea that human performance is for everyone. The company focuses on helping individuals improve in four pillars of human performance: mindset, nutrition, movement and recovery. The company does this by learning about its clients, designing tailored solutions based on the population's needs, delivering that solution, and then measuring results and refining the program.

[FitBit](#) was founded in 2007 when the co-founders, James Park and Eric Friedman, realized that sensors and wireless technology were far enough advanced that they could bring them to the health and fitness industry. The company offers solutions for employers, health plans, and health systems. The technology allows customers to engage more meaningfully throughout the day to help achieve health and fitness goals.

[Fitmatic](#) is a SaaS platform which aims to help companies adapt to their employees' wellness desires and goals. The company starts by creating awareness of the client's wellness program and identifying pain points. Then it attempts to drive adoption, implement variety, and build trust by introducing, emphasizing, and engaging using six daily habits (hydration, nutrition, sleep, exercise, lifestyle and reflection). Fitmatic also integrates with digital devices, such as fitness trackers and smart watches.

[Goodpath](#), founded in 2019, is a telehealth provider of personalized and doctor-approved self-care programs designed to help people manage common health conditions such as sleep, back pain, and IBS. Programs can include nutrition coaching and supplements; movement and lifestyle (like online yoga or strengthening exercises); mindfulness and meditation (like guided meditations and journaling), and coaching and guidance (1:1 coaching and other guidance to help people reach their goals).

[Grand Rounds](#) was founded in 2011 by Owen Tripp and Dr. Lawrence 'Rusty' Hofmann with a goal to raise the standard of healthcare. Grand Rounds offers on-staff clinical expertise, a provider-quality measurement platform that adjusts with each search, and a complete care experience for a customer's employees and their families. The company helps employees understand their health benefits and connect with trusted doctors matched to their needs with personalized support.

[Gympass](#) is a platform that connects users to a network of fitness and wellness providers. Employees gain access to gyms and studios, in-person and live-streamed classes, personal training sessions, fitness and wellness apps — all with one membership. Clients include Etsy, Citizens Bank and Activision/Blizzard.

[Karelia](#) was started in the 1980s as Health Navigators. It offers risk reduction programs for diabetes, heart disease and obesity. Most of its programs are typically offered at worksites and utilize lessons on healthy nutrition, food label reading, portion control, and identifying healthy choices.

[Marino Wellness](#) offers services such as in-office massage, meditation and fitness. The company also offers seminars and 1:1 coaching. Clients can select a frequency of service that aligns with individual strategy and budget. A dedicated program coordinator manages onsite providers, creates digital marketing materials to increase usage, and sets up digital scheduling solutions.

[Orriant](#) was founded in 1996 by Darrell Moon. It is an opt-in program where employees commit to living healthier lifestyles and keeping fitness and wellness goals. Employees who are able to meet their goals will enjoy better health and pay a lower premium for their health insurance. Other employees who choose not to participate in the program or complete their goals

end up paying a little more for their health insurance premiums. The employees not participating end up funding the discounts for both the healthy employees and the business as a whole.

[Peerfit](#) is a digital health tech company that aims to make active lifestyles social and easy. Peerfit organizes social gatherings to capitalize on the social connection aspect of habit building. Their users can access a wide variety of different types of exercise classes at fitness studios and gyms across the country.

[Rightway Healthcare](#) is a healthcare tech platform that aims to optimize expenditure through advocacy for patients and a personalized navigation team. Clients include Custom Ink, King's College and Sequoia. Rightway uses artificial and human intelligence to help employees make optimal healthcare choices. It also sets up a historical baseline for each client's population in order to develop plans for identifying and eliminating preventable healthcare spending.

[Avidon Health](#) is a platform that serves employers, wellness vendors, health plans and healthcare providers. The company offers programs in many health areas including smoking cessation, resilience and stress management, alcohol management, nutrition and weight management, exercise, diabetes management, and sleep management. SelfHelpWorks' online video programs employ a proprietary cognitive behavioral training process that combines the tenets of cognitive behavioral therapy with health coaching best practices to retrain both the brain and the body. SelfHelpWorks was recently acquired by MedPro Wellness and the two companies will soon be launching Avidon Health as they transition over the next months.

[Teladoc Health](#) is a virtual healthcare provider aiming to create a comprehensive suite of care solutions. It has combined the capabilities of several consumer brands, including Livongo, Betterhelp and Healthiest You. Livongo offers personalized tools and support for total chronic condition management. Betterhelp is focused on making mental health counseling available to everyone. Healthiest You is an app that allows users virtual access to doctors and therapists. Users can also search for providers, get a second opinion, compare prices, and connect with their insurance providers.

[Vous Vitamin](#) was founded by two doctors who wanted to help individuals access personalized vitamins. Their system is based on the founders' experience in endocrinology, metabolism, and preventative health. Users take a quiz regarding lifestyle, diet, fitness, health issues, and demographics. The results determine where individuals might be deficient and offer a personalized plan for supplementation with Vous vitamins.

Mental Health and Mindfulness Vendors

With proactive mental health support becoming more mainstream coupled with increased demand on the employer side, mental health providers are seeing the potential for significant impact. Vendors who can help employers reduce the common access barriers for employees such cost, convenience and complexity have the potential to get employees and their dependents the proactive support they need through life's ongoing challenges.

[Ginger](#) was founded in 2010 by entrepreneurs and data scientists at the MIT Media Lab who wanted to design a platform using smartphone-based technology to identify patterns of anxiety, stress, and depression and to then alert patients and their healthcare providers to deliver care. Today, Ginger brings on-demand mental health support within seconds to those in need. Members can connect with a coach via text, 24/7, 365 days a year. For those who need additional support, a therapist or psychiatrist can be added to their care team through video sessions. Ginger has over 200 customers, including Delta Airlines, Sephora, Survey Monkey and Domino's Pizza. The median time for a member to get access to a coach is 44 seconds, and the median time for a member to get access to a therapist or psychiatrist is 10.5 hours.

Getting employees quick access to support was particularly important to Chegg, an education and technology company, whose CEO had been contacted by several employees about suicide attempts and overdoses involving either the employees themselves or their dependents. With less than 2% of the company's population utilizing the EAP, Chegg needed a partner that could help address employees' mental health concerns. After three years of partnering with Ginger, 21.4% of Chegg employees are Ginger members and 65% of those employees actively engage with the platform at any given time.

An employee from another Ginger customer underscores how important quick access and convenience is when managing mental health challenges. This employee said, “Searching for a therapist is overwhelming. Coordinating with my insurance, searching for convenient locations, cross referencing credentials – all that is stressful, especially when you need help. It was very easy to use the Ginger app and meet my coach. No appointment is needed. I can even reach out late at night when I can finally take a moment to myself.”

Lyra was founded in 2015 with an original goal of reimagining the employee assistance program and transforming the mental health system by combining technology with a human touch to enable people to lead emotionally healthy lives at work and at home. Today, Lyra has expanded its services by allowing customers to integrate their benefits with a customer's existing health plan. Through Lyra's digital platform, users can receive personalized matches to the right providers with the right expertise for their needs. Appointments are booked online for in-person or lvideo visits, ensuring members get the clinically appropriate amount of care they need to get better. Lyra coaches, therapists, and physicians also leverage the platform to incorporate digital exercises, activities, videos, and between-session messaging to help people get better faster (what Lyra calls its Blended Care Platform). Lyra has approximately 50 customers, including Starbucks, Facebook, Morgan Stanley and Genentech.

One of Lyra's customers, a manufacturing company, partnered with Lyra in 2019 to ensure employees and their families had fast access to high-quality care when they needed it. Their partnership reduced their mental health care costs by 39% in just two years while increasing the number of employees getting mental health support. One employee commented about their experience with Lyra, “Without it, I wouldn't have found my path forward. Without it, I wouldn't have found a person/therapist who actually cares. Without it, I don't know where I would've been or gone.” Here are some interesting results from this particular customer:

- \$1.15 million mental health-related savings in two years after launching Lyra
- 79% of members clinically improved or recovered based on clinical assessments (PHQ9, GAD7)

- 3.4% of members in care
- 93% of members are highly satisfied with Lyra

Total Brain was founded in 2000 when its founder created a neuroscientific consensus with 200-plus institutions globally, concluding that the brain could be measured by 12 core capacities. He spent 18 years of R&D to build and validate tools to measure these 12 brain capacities that define mental health and the corresponding screening, support, tools and courses that ultimately help individuals to nurture their mental health. Today, Total Brain is a mental health and brain performance self-monitoring and self-care platform. Total Brain has approximately 35 corporate customers, including Boeing, Nationwide, Kaiser Permanente and AARP.

One customer, a healthcare IT company, began working with Total Brain about three years ago. The company sought to monitor stress levels among its employees to reduce overall healthcare costs and improve employee performance and productivity. Using Total Brain's robust workforce analytics, the company was able to correlate an increase in employee stress levels with specific times of the year and determine that more than 7% of their population was highly stressed. By using Total Brain's self-care tools, the company saw its employees' overall brain performance improve by 6 points (at the high end of the expected range), with 94% of users noting that they found Total Brain effective in improving their brain health and 12% reporting that they felt less overworked and were performing better at their job. According to one employee, “The meditation exercises have been very helpful. I deal with anxiety and they come in handy whenever I am feeling overwhelmed or starting to feel anxious. I will always resort back to this workshop to do these exercises. I also really love the exercises with positive thinking and reinforcement.”

Other Mental Health and Mindfulness Vendors

Beacon Health Options provides behavioral health solutions by offering access to a broad network of behavioral health providers and facilities. They offer programs specifically for mental health and substance use disorder management,

specialty programs for autism and depression, work/life support and a comprehensive EAP.

[Betterhelp](#) is an online counseling platform aiming to make counseling more accessible for all. The company works with licensed psychologists, marriage and family therapists, clinical social workers, and board licensed professional counselors.

[Brain.fm](#) is a company that aims to improve a user's focus with functional music. The company holds patents on key processes for creating functional music, including technology to elicit strong neural phase locking allowing neurons to engage in various kinds of coordinated activity and technology to remove distraction in sound. Brain.fm is a collaboration between scientists, musicians and developers who believe that the best approach to functional music is not through curation of existing music, but through research, testing, and crafting music with function first.

[Calm](#) is an application for sleep and meditation. It was founded by Alex Tew and Michael Acton Smith. It offers insight into many aspects of mindfulness including meditation, sleep, music and mindful body movement.

[ComPsych](#) was founded in 1984 by Dr. Richard A. Chaifetz as a provider of employee assistance programs. It has since expanded to include absence management, FMLA administration, behavioral health programs, work-life services, organizational support, and health and wellness services.

[CredibleMind](#) was founded in 2018 to help individuals navigate through the noise that exists in finding appropriate mental healthcare. CredibleMind offers a large collection of expert-vetted, AI-captured mental health and wellbeing resources. Beyond its library of resources, assessments and symptom checkers help people identify potential trouble areas.

CredibleMind delivers evidence-based approaches populated with content that make it easy for people to engage and access resources specific to their needs and preferences. It can be easily customized to integrate benefits, point solutions, and network providers to boost engagement.

[Evermind](#) leverages technology originally developed to help astronauts in space to provide solutions for broader mental health challenges. Its first product, ePST was designed to

deliver problem-solving treatments to combat depression. The platform offers a full suite of computer-guided mental health solutions that go beyond treating depression and include managing health, family issues, and more.

[Expectful](#) is a meditation and sleep app for fertility, pregnancy and motherhood. Its CEO, Nathalie Walton, discovered meditation during her own pregnancy after she was told that she needed to reduce stress for the sake of her baby's health.

[focus@will](#) started in Los Angeles in 2011 when founders Will Henshall and John Vitale became interested in why people like to listen to music while at work and studying. Research showed two out of three people like to listen to music while they work or study, but it's difficult to find and manage sounds that consistently work well. So the founders created a neuroscience-based music service that helps increase focus by reducing distractions and helping people hit their deadlines.

[Happify](#) was founded in 2012 by three entrepreneurs. Happify focuses on providing mental health activities from the fields of positive psychology, mindfulness, and cognitive behavioral therapy. The company makes these activities available on multiple devices including smartphones, tablets and computers. Users can measure their positive thoughts before and after use of Happify to see their progress.

[Headspace](#) was co-founded in 2010 by Andy Puddicombe, who trained as a Buddhist monk for over 10 years in the Indian Himalayas. His training inspired him when he met his fellow co-founder, Rich Pierson, who needed help dealing with the stress of the advertising world. The company started as an events company, but the attendees wanted to take what they learned home with them. It is now a mindfulness application aimed at helping professionals build healthier, more productive organizations through guided meditations, animations, articles and videos.

[Insight Timer](#) is an app for sleep, anxiety and stress, offering support and meditation practices on topics ranging from stress and anxiety to health and happiness to recovery and healing. The company has a catalog of over 65,000 guided meditations as well as live events and yoga classes.

Mindshare Partners is a nonprofit company aimed at increasing positive mental health in organizations. It offers three different training and advising solutions through customizable packages, including a culture package, a manager training series, and executive strategy development. It has also created free toolkits and guides for clients to offer to their employees. Clients include Nerdwallet, Genentech and Verizon Media.

Mindstrong is a platform for virtual mental healthcare, providing virtual therapy and psychiatric care. The company partners with users' health insurance plans and matches users with therapists. Therapy happens over messaging, phone calls or on its mobile app. Mindstrong therapists utilize cognitive behavioral therapy, coping and emotional regulation, psychoeducation, crisis management, reflective listening and empathy.

Modern Health aims to provide a full spectrum of support for an individual's mental health. It starts by identifying personalized needs and helping with goal setting and then matches individuals with a care plan (encompassing digital content, coaching, and therapy) and providers. Customers include Pixar, Eventbrite, Credit Karma, Postmates and Lyft.

Muse aims to improve an individual's meditation practice through technology. The company sells headbands with built-in EEG hardware giving users feedback on their changing mental state and working in conjunction with a guided meditation app. As a user's mental state changes, they receive real-time feedback. The company's app also includes sleep content to help users prepare for a more restful sleep.

NeuroFlow, a platform for technology-enabled behavioral health integration, was founded by Christopher Molaro after he returned from serving in the Army and noticed a gap in the behavioral health system. The company combines workflow automation, an engagement platform, and applied artificial intelligence to simplify remote patient monitoring, deliver risk stratification and facilitate collaborative care.

Path is a network of mental health and addiction treatment providers. The company has partners in behavioral health treatment hospitals, partial hospitalization programs, intensive

outpatient programs, therapists, psychiatrists, case managers, coaches and peer support programs.

Potential Project is a global leadership training, organizational development and research firm providing customized, organizational effectiveness programs based on mindfulness. Its mission is to enhance individual and company performance, resilience and creativity. The company has brought mindfulness training to 100,000 individuals in over 500 companies across North America, Asia, Europe and Australia. Solutions span leadership development as well as organization-wide training for individuals and teams.

Rethink My Therapy is a platform that helps individuals find the right mental healthcare specialist to address their needs. The platform allows for video calls, phone calls, secure messaging and record transmission primary care doctors. The company offers individual and couples' therapy and psychiatric services.

Sanity & Self is a guided self-care app specifically for women's mental health. It offers bite-sized multi-part journeys in self-healing, self-discovery and self-empowerment, all led by experts in relationship therapy, mindfulness, sex, sleep, personal development, women's empowerment, personal training, breathing, meditation and more. Experts in various areas are available to users for support and advice via text or video chat.

Sentio Solutions develops biomarkers and digital therapeutics. It focuses on developing proprietary algorithms, software and hardware solutions that recognize human emotions. The company offers two programs: Feel, designed for people who face ongoing mild to moderate mental health disorders such as depression, anxiety, panic attacks and require long-term continuous monitoring and support; and Feel Relief, for people who require short-term mental health support during the COVID-19 outbreak to better handle excessive fear and stress, social distancing, parenting anxiety, remote working, financial uncertainty and grief management.

Session Together is an online platform providing mental health support by enabling members to anonymously share what they are dealing with and connect with others who have dealt with a similar challenges. Mental health experts also provide

talks on topics that affect everyday life. Session Together looks to leverage connections with people who share common struggles to help them manage through difficult times and provide human connections.

[SIYLI](#) was founded in 2005 by a Google engineer as a course to help Google employees develop mindfulness, empathy, compassion, and overall emotional intelligence. In 2012, it was spun off as a non-profit educational institute and took on the name Search Inside Yourself Institute. SIYLI now offers programs, tools and content on mindfulness-based emotional intelligence, empathy, compassion, resilience, leadership and more to its clients which include companies like SAP, Procter & Gamble and Salesforce.

[Spiritone](#) was started in 2017 and began operations in January 2019 after the completion of a pre-seed fundraise. The founder, Jamie Pabst, struggled with anxiety and stress for years while she was working in finance; music was one of the only things that could immediately help her feelings of stress subside while getting work done at the office. Spiritone is music reimagined for health outcomes as an iOS music-based application. It combines principles of music therapy and neuroscience to help users achieve their emotional goals.

[Spring Health](#) was founded in 2016 by April Koh after she saw a friend struggle with trying different types and dosages of antidepressant medications. The company now has a mission to eliminate all barriers to mental health. It combines its platform with a diverse provider network and offers the full spectrum of care - from self-guided CBT exercises to therapy sessions to medication.

[Talkspace](#) is dedicated to online therapy. Clients start by taking a brief assessment and then they select from a list of therapists with which they are matched. Therapists are available 24/7 and clients can easily switch therapists at no extra cost. Talkspace accepts many insurance plans. Companies that use Talkspace include Cigna Health, Swarthmore College and Sleep Number.

[TRIPP](#) was founded in July of 2017 by Nanea Reeves. It is a platform that uses interactive and immersive virtual reality and mobile experiences to improve mental health. The company is available to both consumers and enterprise customers and has several patents pending on its technology.

Caretaking Support Vendors

Caretaking support vendors are getting a lot of attention these days as family support benefits have taken center stage, particularly those supporting working parents who are dealing with closed daycare facilities and/or schooling from home while working from home.

One group that hasn't received as much attention is working caretakers of aging parents and elders. This group will likely see more attention in the future as employees open up further about their personal struggles and needs.

[Grayce](#) is a caretaking solution provider that was founded in 2019 when its co-founders experienced the challenges that families have in navigating care for aging and vulnerable loved ones. Grayce is a navigation solution for family caregivers, going beyond referrals or coordination. Its mission is to empower families by providing expert guided support coupled with a digital experience that addresses a member's needs along their individual care journey.

An employee from one of Grayce's member companies called about his parents who'd fallen ill with COVID overseas. They had subsequently recovered, but continued to have significant ongoing comorbid health concerns. This employee was extremely anxious, and he was considering leaving his job to fly to his parents in the midst of the pandemic. The Grayce expert was able to assuage his anxiety and help him deal with the situation. The two discussed his parents' medical status and comorbid conditions, their care ecosystem, ways to coordinate care with his sibling, and tools to monitor vitals and care needs from afar. The Grayce expert helped the employee create a workable family plan and enabled him to stay engaged at work.

Other Caretaking Support Vendors

[Bright Horizons](#) is a U.S. based childcare provider and the largest provider of employer-sponsored child care. The company began in 1986 by providing on-site child care centers for organizations. Solutions today cover a host of family needs, including onsite and backup childcare, elder care, college coaches, special needs resources and other family support.

[Brightline](#) was founded in 2019 by Naomi Allen and Giovanni Colella with a goal of making it easier to get behavioral health care for children. Brightline is looking to address barriers such as long waiting lists and scheduling multiple appointments with providers. Brightline's services include behavior therapy, evaluation and medication support, speech-language therapy, and coaching support for parents.

[Bundle Benefits](#) is a benefits company founded by Kayla Lebovits who set out to provide quality, worry-free, subsidized virtual care so parents can be confident, focused, and excel at work. Bundle's main product is bundle breaks, said to offer employees the break they need to better focus and recharge from their everyday life. These bundle breaks can be made specifically for kids, teens or elders so that employees can have time to focus on work or get a task done. Bundle also offers employee designed breaks to learn a new skill or enjoy a hobby they love. Clients include BCG, Airtable, and Oberland Capital.

[Care.com](#) helps families find child care, senior care, special needs care, tutoring, pet care and housekeeping support. Individual caregivers can create a profile, be rated by families that they have worked with, and display their specific skills and experiences. Care@Work is the workplace benefit offering employees flexibility and choice to address their caretaking needs.

[CareScout](#) was founded in 1997 and is a provider of elder care management support services. It is a Genworth Financial company and provides service solutions for seniors, families and companies beyond traditional insurance. Services include caregiver assessments and facility evaluations as well as care advocacy and discount programs.

[Carrot Fertility](#) is a fertility benefits company that aims to provide fertility benefits for employers. The company delivers a care team, a global provider network, a services payment card, and financial and benefit administration. Other services include donor-assisted and third-party reproduction, fertility planning and care, and adoption assistance. Clients include Box, Stripe and Back on My Feet.

[Cleo](#) is a benefits platform for working parents that aims to fill the gaps in traditional benefits for families. The platform comes with 1:1 guidance with experts (i.e., lactation

consultants), evidence-based programs and a personalized app. The company has a variety of programs to help employees through different needs at different stages of parenting – planning to become a parent, pregnancy/birth/baby, kids, return to work, career coaching, and management training.

[Helpr](#) is an app for providing parents high-quality, affordable back-up care. The app provides a selection of in-network, screened caregivers to its users. During the pandemic, Helpr is also connecting people within a community for care arrangements through care share pods.

[Homeschooling Heroes](#) is a loosely organized group of families committed to teaching their children outside of the traditional school structure. They have free resources as well as discounted resources from their various partner businesses, colleges, artists, and technology leaders. Offerings include group classes, field trips and events, family trips, volunteer opportunities and “mom's night outs.” While this organization is not a typical corporate vendor, it does provide relevant resources for working parents during these unprecedented times.

[Maven](#) was founded by Katherine Ryder and is a telemedicine network focused on women's health. Maven aims to fill the gaps in care surrounding fertility, pregnancy and postpartum care. It offers programs on planning, egg freezing, fertility, adoption, surrogacy, maternity, breast milk shipping, child care support and pediatrics.

[Urban Sitter](#) is a babysitter and nanny network that allows parents to search for, book, pay, review, and recommend babysitters and nannies. All babysitters and nannies are background checked and can be reviewed and rated by families that they have worked with. Urban Sitter helps with occasional childcare, full-time childcare, backup childcare, pet care and soon will add household help for elder care and errands.

[Wellthy](#) was founded by Lindsay Jurist-Rosner and Kevin Roche with a mission of caring for the sick and elderly in a seamlessly human and tech-powered way. Its platform is personalized to each individual to help them take care of their loved ones, including support for them as caretakers. The company helps users deal with health conditions, special needs, aging, mental health, veteran support, and financial hardship.

Conclusion

The corporate wellbeing market is exploding with solutions ranging from ways to find greater purpose and meaning to support for mental and physical health to helping fill gaps in financial/family care and more. While offerings are plentiful, so are the needs of employers. 2020 brought focus to gaps in health and wellbeing needs of employees around the globe. The key to navigating this crowded market is to gain an understanding your people and the challenges they are facing. These insights will then help you establish priorities and think more holistically about the role your organization can play to help people be better their best selves at work and at home.

Nancy Vitale

Managing Partner, Partners for Wellbeing



Nancy Vitale is a senior HR executive with 25-plus years of experience driving culture transformation, organization change, and profitability for industry leaders, including Genentech/Roche, Procter & Gamble, CIGNA, and Deloitte Consulting. Through people, culture and strategy, she has delivered business growth and transformation while building recognized great places to work.

Nancy founded Partners for Wellbeing, a boutique consulting firm that integrates total wellbeing into company culture so that people can better manage stress and anxiety, build greater resilience and ultimately be at their best. In addition to her work at Partners for Wellbeing, Nancy is on the advisory board of several high-tech startups and is a board director for Voyager Therapeutics, a gene therapy company focused on treating patients with neurological diseases. She is also on the national board for the Make-A-Wish Foundation and is a senior faculty member of the Josh Bersin Academy.

Ann Stevens

Global Sourcing Manager, Mondelez International



Anne Stevens is a global workforce and mobility expert with 14 years of experience, particularly in total rewards and HR Operations. Most recently she has spent the past two years leveraging her cross-functional and human capital strategy experience to negotiate cost-saving opportunities and bring best-in-class external suppliers to Mondelez International's HR function. As a life-long learner, Anne is fascinated how to bring out the best work of employees by leading complex organizational strategy initiatives. She holds an M.A. in migration studies from the University of Kent and an M.B.A. from Northwestern University's Kellogg School of Management.

Victoria Morgan

Marketing and Communications Associate, Worksite Wellness Council of Massachusetts



Victoria Morgan has a masters from Tufts University focusing on communication, intervention and behavior change. She holds a personal training license from the National Federation of Personal Trainers and an aPHR certificate from the Human Resource Certification Institute. She has been involved with many aspects of corporate wellness including physical fitness, nutrition, psychological well-being, and culture change. She strives to be a part of the positive shift that many companies are now making to focus more on their employees' health. She has done this through work with the Josh Bersin Academy, the Worksite Wellness Council of Massachusetts, and her own personal blog.

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