WBI Setup and Management Timelines

WELL-BEING index

Administrative Time Involved

The administrative time necessary to successfully use the Well-Being Index with your organization varies from organization to organization, and depends mainly on the size of your organization and how often you are going to reassess your participants. We've broken down the use of the WBi into 3 categories - Initial Setup & Launch, First Reassessment, and Ongoing Management, and listed estimated admin time during each phase. All times are intended as examples and can vary depending on group size, organization size, number of versions (physician, nurse, resident/fellow, etc) being deployed, etc.

Initial Setup & Launch (7-10 hours)

We suggest about 4-6 weeks to prepare communication, resources, and testing before invitations are sent out. Below is an example timeline, but timing is flexible and will be adjusted to meet each organization's needs.

Phase I: Initial WBI Rollout Plan

Milestone	Duration
Project Kickoff Meeting	Week 1
Communication Planning Meeting	Week 2
WBI Account Worksheet Completed	Week 2 or 3
WBI Account Updated	1-2 days
Invitation Sent To Test Group	Week 3 or 4
Pre-Invite Check-In Meeting	If Necessary
Pre-Invite Communication Completed	1-7 days prior to launch
Live Invites Sent	Week 4-5
Initial Assessment Window	30-45 Days
Account Training Meeting	Week 5-6
Post Assessment Check-In	TBD

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First and Ongoing Reassessment Campaigns (3-5 hours)

We recommend a re-engagement campaign every 6-12 months to compare against the baseline/previous data. The Well-Being Index team will assist with the setup and launch of the first reassessment campaign. The sample timeline below shows this process.

Phase II: WBI Reassessment Plan

Milestone	Duration
Reassessment Pre-Launch Meeting	Week 1
WBI Account Updates Communicated	Week 2
WBI Account Updated	1-2 days
Pre-Assessment Communication Completed	Week 3
Live Invites Sent	Week 4
Reassessment Window	30-45 Days
Reassessment Followup Meeting	7-10 Days after window closes

Ongoing Management (Varies)

Ongoing management time is one of the hardest things to estimate because each organization uses the Well-Being Index differently. Our most successful clients have a team of individuals dedicated to well-being work at the organization (ex. Chief Wellness Officer, wellness coordinator, etc) who use the WBI as an important tool to help with that work. Depending on your organization and needs, ongoing management could be anywhere from a few hours a year to dedicating one or more full-time positions to wellness work with the WBI a core part of their responsibilities.

Regardless of how your organization decides to use the Well-Being Index or how many people are on the wellness team, there are some important tasks to keep in mind for whomever will be responsible for administration of your account.

1. You will want to begin monitoring your data and process improvement question responses (if available) immediately following the Account Training Meeting. Process improvement responses can add up quickly, particularly if you have a large group of participants, so it is important to stay on top of tagging/categorizing those.

2. The initial setup of advanced reports (if available) can take some time. Your Client Success Representative will walk through this process during the account training meeting, but it is important to dedicate some time to learning the report creation tool and setting up the reports that will be most helpful for your organization.

3. Reporting results back to key stakeholders and participants is a key component for success with the Well-Being Index. Your Client Success Representative will review this process during your post assessment check-in meeting, but it is important to repeat this process each time you do an organizational reassessment with the Well-Being Index.

4. We recommend reviewing and updating your account on an annual basis at minimum, and preferably prior to each organizational reassessment. This includes tasks like reviewing your resources to see if information has changed (phone numbers, websites, etc), if you have new resources to upload, and updating process improvement questions if available on your account.

The Well-Being Index team is committed to the success of our clients. Each organization will work with a dedicated Client Success Representative during the initial setup and launch of the Well-Being Index, and that individual will be your main point of contact for as long as you are using the WBI. Questions and ongoing support can be submitted to our entire team using the support button located at the lower right of the administrator area.