



WELLCERT

THE PREMIER WORKSITE WELLNESS CERTIFICATION PROGRAM

You deserve a medal

Let's face it: wellness is really hard. Changing the health behaviors of hundreds or thousands of humans is no picnic. But this critical mission gets a whole lot more doable when you know how to use every weapon you have at your disposal.

You probably aren't in wellness for your health. We are all in this to drive results—to empower people to make healthy changes. But it takes a sophisticated approach to create behavior change that generates measurable results year after year. Like any other tough challenge, it takes mastering a wide range of skills and methodically going after the right vision.

With no sacred cows, we narrowly focus on results—that's why we get to train the best. Other national organizations offer wellness training, but they have to be all things to all people. Building over 1,000+ wellness programs, we've learned to avoid the theory, fluff, and fads, and get right to what works. Top consultancies, health plans, brokerages, wellness councils, and firms of all sizes choose WellCert when they want to drive results.

What is WellCert?

WellCert is a four-level professional certification program, completed by **thousands** of wellness and benefits professionals. Each level covers **12 key skills** necessary for results-driven programming:

Level 1: Certified Wellness Program Coordinator (CWPC)

Level 2: Certified Wellness Program Manager (CWPM)

Level 3: Certified Wellness Program Director (CWPD)

Level 4: Certified Worksite Wellness Program Consultant (CWWPC)

Level 1 is a foundation for all wellness and benefits professionals. Health plan account managers, brokers, HR consultants, and benefits staff get wellness skills and frameworks they need in today's environment. Level 1 and 2 together—Certified Wellness Program Manager—is a must for all full-time wellness program professionals. Levels 3 and 4 are critical for wellness staff in complex organizations and consultants. Experienced professionals can take an exam to move to Level 2.

Each level of WellCert requires two days of instruction, readings, and an exam. Grads receive a certificate and a listing on our online professional registry.

Skills in Level 1:

1. *How to build strong senior management support for wellness*
2. *How to assess your employees' wellness needs*
3. *How to use a Health Risk Assessment (HRA)*
4. *How to set your wellness strategy*
5. *How to design your organizational infrastructure*
6. *How to design your technology infrastructure*
7. *How to design effective wellness communications*
8. *How to design your health management process*
9. *How to design group activities*
10. *How to create a supportive environment for wellness*
11. *How to design onsite programming*
12. *How to perform a simple evaluation of your program*

We deliver certification training live in-person, live online, and pre-recorded online. Participants receive a 250+ page course workbook with all slides, readings, exercises, and additional tools. WellCert also requires completion of two hours of online continuing education each year.

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WellCert grads are highly satisfied



Grads rate WellCert an **average** rating of 9 out of 10. Here's what they say about WellCert:

"I have worked in corporate wellness for more than 20 years and I was amazed at how useful the Level 1 training was. It's a 'must' for everyone in the field."

"The WellCert Level 1 CWPC exceeded all my expectations! Thank you for the valuable concepts, practical strategies and the great Course Workbook. I know I will use it often!"

"I was a little skeptical about the two days of training at Level 1 but you have made me a believer! The material and the case exercises have enhanced my knowledge significantly!"

"The fast pace of the training and the variety of learning activities kept my attention."

"I found the Certified Wellness Program Coordinator (CWPC) course to be extremely well-organized and practical. It's great to now have some proven frameworks and tools to approach worksite wellness programming."



Our philosophy

We come to wellness with a specific point of view: **Wellness programs must drive measurable results.** To sustain and grow investments in wellness, programs need to demonstrate how they deliver important benefits to their organizations. This includes ROI in many cases, but it doesn't have to be limited to economic variables.

Wellness drives measurable results by changing the health behaviors of many people each year. Creating sustained behavior change requires maximizing the impact of every available tool and resource. It requires that we select the right success metrics and continue to optimize our wellness programming based on our own data.

To help you do this, we look for best-practices from outside wellness. We are students of organizational behavior sciences, marketing, behavioral economics, data analysis, and technology—we are always looking for best-practices to apply to wellness to drive results.

What differentiates Results-Driven Wellness?

#1 Measurement: We believe in the management maxim: "you get what you measure." We integrate measurement and evaluation strategies in every level of WellCert, including ROI.



#2: Nudges matter: We integrate behavioral economics into all aspects of incentive design and employee communication topics.

#3: Give them their own 'numbers': We integrate a health management process into every level of WellCert. That means we teach you how and when to feed personalized data back to your program participants.



#4: Infrastructure is vital: Many programs cover only the clinical side of wellness. We set you up to build the organizational and technology infrastructure to make your program successful.

#5: We prepare you for influence: To create effective, sustainable programming, you have to have senior leaders deeply bought-in to wellness. Our successive levels of certification build deeper influence skills and put you in a place to secure the management support to drive results.



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Building wellness expertise: WellCert skills in detail



Level 1: Certified Wellness Program

Coordinator. This course covers key skills that professionals need to build a foundation for results-driven wellness programming. Level 1 covers the scope of wellness programming typically present in smaller organizations with limited resources, while

laying the groundwork for higher certification levels. Our approach is highly practical, focusing instructional time preparing you to deliver results with the development of these skills:

1: How to build strong senior management support: This skill covers the process for crafting rationales for wellness that fit your organization. It provides a summary of ROI expectations found in scientific literature, and how to use this evidence when speaking with C-level leaders. It also covers biases commonly held by managers that need to be overcome.

2: How to assess your employees' wellness needs: This skill covers the top prevention targets most commonly included in wellness programming, and the interventions that address them. It also identifies and details how to use many data sources that can inform your wellness needs assessment.

3: How to use a Health Risk Assessment (HRA): As a continuation of the needs assessment and planning topics, this skill covers the understanding of the potential of the HRA, the evolution of HRAs, as well as their key role in comprehensive wellness programming. It also provides practical tips on how to use HRA data, and how to select HRA vendors.

4: How to set your wellness strategy: This skill covers key program models and how to choose the right one for your organization, depending on your goals and needs. The skill also provides guidance on what stakeholders should be involved in setting the direction of your programs.

5: How to design your organizational infrastructure: This skill covers key topics like program staffing, objectives and metrics, working with stakeholders and wellness champions. It provides key checklists that will help you build your program launch plan, budget, and select vendors and the program's infrastructure.

6: How to design your technology infrastructure: This skill helps wellness program staff understand how key technology fits together to deliver effective programming. It outlines data flow between components, and helps wellness people argue for technology investment.

7: How to design effective wellness communications: This skill distills marketing best practices and pitfalls. It outlines the core components of an effective employee communications plan, while also digging into key communications channels like email. It also provides creative ideas you can use to spice up your wellness communications.

8: How to design your health management process: This skill covers the levels of targeting and personalization needed to provide targeted

interventions. It also outlines the various ways to feedback personal health metrics to individuals to provide motivation for change.

9: How to design group activities: This skill provides helpful templates and creative ideas for group programming. It provides participation strategies and rationales for selling investment in group activities to your leadership.

10: How to create a supportive environment for wellness: This skill lays out ways an organization demonstrates or sabotages its commitment to wellness. It covers key policies, physical environment factors, management messaging, value dynamics and other strategies that must be aligned in order to create a real culture of wellness.

11: How to design onsite programming: This skill covers major event-planning pitfalls and considerations when providing onsite programming. It covers a range of key planning questions applied to eight common onsite wellness activities.

12: How to perform a simple evaluation of your program: This skill provides an overview of the most important methodologies used to measure the results of wellness programs. It provides evaluation strategies, methodological issues to address, and nine suggested evaluation modules that answer common senior management questions. The range of concerns here vary from simple survey approaches to complex HRA matched cohort analysis.



Level 2: Certified Wellness Program

Manager. This course builds on skills laid down in Level 1 to scale your impact. Level 2 covers key topics more senior wellness program staff face every day.

Key topics include producing results, increasing participation, using technology wisely and measuring ROI. Our approach is highly-practical. All instructional time prepares you to deliver results by developing these skills:

13: Enhancing program results through AMSO: This skill provides a working model of how to apply the ground breaking insights of AMSO into the basic requirements of results-driven wellness programs. Beginning with O'Donnell's seminal work we examine the four major requirements of effective behavior change programs. We dig into the ramifications of Awareness, Motivation, Skill acquisition, and Opportunity to practice (AMSO) and how to build each into your programming.

14: Overcoming stakeholder objections: This skill helps you identify the various internal and external stakeholder groups, their needs, biases, and top objections. Along with these important insights we will cover how to develop your own stakeholder relations management (SRM) approach.

15: Managing vendors: This skill helps assure that you select the best vendors and manage their relationships effectively. We also cover strategies for preventing unauthorized disclosures of IHI and PHI, how to keep and maintain confidentiality. We also cover strategies for establishing and maintaining healthy vendor relationships and building your annual Vendor Report Card.

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16: Maximizing participation: This skill provides a step-by-step approach to maximizing program participation. We cover ten key strategies for maximizing participation along with a discussion of the four major recruitment strategies and what you can expect from each.

17: Using wellness incentives: This skill covers an understanding of how to use short-term and long-term incentive features within a wellness program and best practices for how to structure incentives that can help assure 90%+ levels of participation. We also cover how to get the highest level of motive force from your incentives.

18: Using self-service technology for wellness: This skill provides participants with an understanding of the strategic and operational uses of key self-service technology in worksite wellness programs. This technology includes wearables, commitment aids, mobile apps, online trackers and e-Health platforms. Learn how these tools can help you reach deep into your population.

19: Using biometric screening and coaching: This skill covers the key issues in the effective use of biometric screening and coaching. Limitations and future strategies for getting the most out of screening and coaching interventions are also covered. Participants will also learn how to get the most out of both of these core interventions.

20: Budgeting for wellness: This skill provides participants with a set of budgeting principles and guidelines and demonstrates a method for estimating budgets for key components of wellness programs. We also consider funding strategies and selected industry benchmarks along with key budgeting tactics.

21: Measuring ROI/VOI: This skill covers how to structure the economic analysis of worksite wellness programs—including a Value on Investment (VOI) style evaluation of their wellness program. We go deep on two key methods for determining your program's economic return: a non-claims based approach and a claims-based approach. The combination of the ROI and VOI gives you the ability to deliver a balanced scorecard for wellness.

22: Increasing ROI/VOI results: This skill examines more than a dozen programming approaches that can significantly increasing the ROI of your wellness program and others that will quickly lift its VOI. These program modifications are discussed with reference to their cost, difficulty, and fit.

23: Addressing well-being: This skill distills a definitional framework, pros and cons and possible points where well-being can be used to position the wellness program with the population involved. We ground this topic in the findings of important national surveys and studies and how to layer well-being into your approach.

24: Building employee trust: This skill helps practitioners increase user trust by dealing effectively with volunteers, using FAQ resources, core user messaging strategies, changing organizational culture and user referral philosophy. We cover how to build and circulate answers to difficult questions employees have. We also cover how to attract, select, and empower wellness champions throughout your organization.



Level 3: Certified Wellness Program

Director. This course builds on the foundations of Levels 1 and 2, putting the focus on further scaling your impact to complex organizations. It also focuses on Health and Productivity Management (HPM) methodologies to scale your impact by developing

these skills:

25: Implementing wellness in large employer organizations: This skill provides a useful operational perspective for the major differences that characterize large employer organizations, integration points, implementation tips and personal characteristics associated with success.

26: Raising awareness for non-employees: This skill emphasizes a deeper understanding of the AMSO framework and how to use it to help assure a results-driven perspective. Also covered are key differences in awareness strategies, most effective awareness interventions and strategies and how to enhance novelty effects.

27: Building motivation for wellness in large organizations: This skill begins with a detailed look at the major programming strategies that large employers can use to augment the innate intrinsic motivation that exists in virtually all work populations. We present strategies for converting extrinsic motivation into intrinsic motivation along with relevant positioning strategies.

28: Building programs that enhance wellness skills: This skill helps participants become adept with the various methods to programmatically building for wellness behavior skills. We also cover retention strategies and behavioral economic adaptations.

29: Building opportunities to practice new wellness skills: This skill helps the participant use strategies that will provide participants opportunities to practicing new wellness behaviors. We make connections to other program interventions and cover how to convey the importance of practicing skills to populations.

30: Using educational interventions to maximize HPM results: This skill teaches participants which educational interventions produce the most health and productivity management results. We cover relevant metrics and measurement as well.

31: Designing health plan benefits to maximize HPM results: This skill gives participants the ability to make targeted health plan design modifications to drive health and productivity management results. We cover strategies for activating health consumers, utilization choices, point-of-use cost sharing, and preventive medical benefit optimization.

32: Using individual interventions to maximize HPM results: This skill connects the dots between HRA and selected claims data, and effective individual intervention strategies. We cover each of the major categories of individual intervention and their corresponding metrics and likely impact.

33: Using employee incentives to maximize HPM results: This skill covers the design and configuration of long term criteria-based wellness incentive programs. Strategies for use of sentinel features, criteria options, verification choices and evaluation measures.

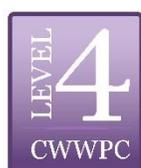
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34: Addressing presenteeism in wellness programs: This skill covers definitional issues, measurement options, intervention strategies, linkage points and positioning methods for organization wide presenteeism efforts.

35: Integrating wellness deeply into an organization: This skill covers how to integrate wellness activities at three different levels. First, we cover how to link various wellness interventions together. Second, we cover links between the wellness programs and other internal organizational functions and services. Third, we discuss linkage with external resources and services.

36: Evaluating an employee wellness program in a large organization: This skill provides the ability to identify evaluation objectives, develop an evaluation plan, plan data collection, analyze data, formulate interpretation, develop recommended program modifications, and plan for utilization of evaluation findings.



Level 4: Certified Worksite Wellness

Consultant. Wellness leaders who complete level 4, Certified Wellness Program Consultant will have a comprehensive understanding of wellness topics.

Level 4 is intended for individuals who serve a diverse set of organizations, customizing wellness program best practices to a range of unique needs. Building on the previous three levels, Level 4 shifts the focus to vision and strategic issues in wellness, as well as deeper coverage of executive influence and the skills to operate across organizations:

37: Building a disability management program in your organization: This skill covers how to examine the various types of leave and how they inform an integrated approach to disability management. We also cover wellness-oriented leave policies, and how to evaluate integrated disability management.

38: Conducting a health plan claims analysis: This skill prepares the participant to know what to request of claims payers, the implications of the data, the normative expectations, analytic pitfalls, presentation tips and progressive ways of using the claims data to improve the wellness program.

39: Creating a wellness-oriented work culture: We take a long-term perspective on cultural norms and the best strategies for modifying them over time in this skill. We cover the organizational requirements for changing cultural norms for wellness decision-making and behavior.

40: Using positive psychology in wellness programming: This skill provides grounding in the conceptual and science base for positive psychology and how to integrate these concepts into your employee wellness program and organization.

41: Understanding the relationship between health risks and health costs: This skill familiarizes participants with the historical evidence, methodological options, and consensus positions in the scientific literature. We also focus on how to use this data to influence stakeholders.

42: Facilitating a wellness planning process for large organizations: This skill provides to participants a step-by-step approach to facilitating

wellness program design teams and how to develop consensus on how to move forward.

43: Building “C-suite” relationships for wellness: This skill covers more techniques to develop solid relationships with executive leaders in your organization. We cover strategies for providing education on wellness topics to senior leaders to build credibility and influence.

44: Building a long-term vision for wellness: This skill covers how to envision and analyze likely program outcomes and scenarios, and use forecasting techniques to help predict outcomes. We also make recommendations on how to using staff and volunteer retreats to develop a future vision for wellness.

45: Integrating work-life balance into wellness programming: In this skill, we cover work-life balance programming, and how a vision for how to integrate work-life balance into existing wellness programming and organizational values.

46: Estimating budget requirements for complex employee wellness programs: This skill provides participants with practical methods for budgeting and for estimating the financial needs of large and complex wellness programs. We also cover strategies for presenting the financial needs for wellness in the most favorable organizational light.

47: Insuring your wellness program produces behavior change: This skill operationalizes the AMSO framework to assure wellness program produces long-term behavior change. We highlight techniques and tools for applying the AMSO framework and provide a step-by-step approach.

48: Improving your personal effectiveness as a wellness consultant: This skill provides participants with a philosophy for consulting, a look at helpful personal attributes, practical preparatory steps, tips for effectiveness, business principles. We also cover ways to marketing wellness consulting services and build a robust practice.

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