

# Workplace Wellbeing Suppliers: Market Scan

Dr. Jay Spence for Westpac | October, 2024

# Executive Summary

- A broad review of 126 suppliers was conducted to identify best in class for key buyer criteria. 26 vendors met Westpac's buyer criteria and were included in a narrow review.

❖ *EAP vendors could meet several criteria while specialised vendors met one key criteria at equivalent or higher standards than EAP vendors.*

❖ *Several EAP vendors met best in class criteria on for multiple features, including Unmind, Converge, Modern Health, Telus and Clearhead.*

❖ *Specialised vendors with high quality offerings in a single domain could be used to compliment the features provided by EAP vendors*

❖ *Further analysis is required to determine how existing internal Westpac resources could be used to compliment external vendors.*

# Project scope and objectives

- Westpac is seeking a market scan that provides recommendations for a digitally enabled wellbeing offering that has value for the majority of 40,000 diverse employees and that also includes access to counselling services.
- Westpac's current internal capabilities (allied health and injury management teams) were noted to prevent overlap but suppliers were included for situations where they could increase capability, capacity flex and cost efficiency.
- Selection criteria:
  - Access to high quality clinicians
  - Strong critical incident response including 1:1 and team, virtual and onsite
  - Solution to include mental health and wellbeing content for a large, diverse workforce that can enable them to manage their own wellbeing.
  - Anytime, anywhere, any device access to resources and services (multi-channel)
  - Additional focus for market scan is to provide insights into emerging providers and services that would further add value to our mental health strategy e.g. are there are alternatives to traditional EAP services that add value to our workforce.
  - *Price was not included as a criterion and pricing data was only collected from a minority of vendors as most declined to provide costs until at the procurement phase*



# WORKPLACE HEALTH AND WELLBEING LANDSCAPE 2024 - AUSTRALIA

## OCCUPATIONAL HEALTH AND INJURY MANAGEMENT

[Jobfit](#)  
[Konekt](#)  
[Vitality Works](#)  
[Leap Forward](#)  
[More Good Days](#)  
[Direct Health Solutions](#)  
[Navigator](#)  
[IPAR](#)  
[Injurynet](#)  
[BodyGuide](#)  
[Hubpass by Midnight Health](#)  
[Healthworks](#)  
[Recovre](#)  
[EOL](#)  
[Triivo](#)  
[Ethos Health](#)  
[Desk Coach](#)  
[Arriba Group](#)  
[Executive Health Solutions](#)

## DIETETICS, WOMEN'S HEALTH, SLEEP AND PERFORMANCE

[Digital Wellness](#)  
[Second Nature](#)  
[Uare](#)  
[Fuel Your Life](#)  
[Body Guide](#)  
[Sleepfit](#)  
[Vively](#)  
[Metluma](#)  
[The Growth Initiative](#)  
[Essentio Health](#)  
[Wexer](#)

## FULL SERVICE EAP

[Access EAP](#)  
[Assure](#)  
[Telus Health](#)  
[Caraniche](#)  
[Centre for Corporate Health](#)  
[Converge](#)  
[PeopleSense](#)  
[Carfi](#)  
[Drake](#)  
[WPO](#)  
[Acacia](#)  
[The Mind Room](#)  
[ORS](#)  
[Leapwell](#)

## DIGITAL FIRST EAP

[Clearhead](#)  
[Leora](#)  
[Uprise](#)  
[Sonder](#)  
[Foremind](#)  
[Lysn](#)  
[Talked](#)  
[Unmind](#)  
[Allico](#)  
[CU Health](#)  
[MindFi](#)  
[MindFit at Work](#)  
[Performance Story](#)

## WELLBEING CONTENT LIBRARIES

[Sanctuary Health](#)  
[Rethink Care \(Whil\)](#)

## CLEARING HOUSES

[Beyond Blue](#)  
[Mentally Healthy Workplaces](#)  
[Thrive At Work](#)  
[Safework](#)  
[Black Dog Institute](#)  
[The Parent Well](#)  
[Flourish](#)  
[Superfriend](#)  
[Centre for Transformative](#)  
[Work Design](#)  
[Workwell](#)  
[Everymind](#)  
[Comcare](#)

## FREE GOVT. MENTAL HEALTH TREATMENT PROGRAMS

[Mindspot](#)  
[ThisWayUp Clinic](#)  
[Blackdog Online Clinic](#)  
[eCentreClinic](#)  
[My Compass](#)  
[Smiling Mind](#)  
[Sleep Ninja](#)  
[Mood Gym](#)  
[Centre for Clinical Interventions](#)  
[Bite Back](#)

## COACHING, MENTORING & PEER SUPPORT

[Peoplcoach](#)  
[Tandem](#)  
[The Mintable](#)  
[BetterUp](#)  
[MentorLoop](#)  
[ByMindSide](#)

## RISK ANALYTICS

[InCheq](#)  
[FlourishDx](#)  
[Mibo](#)  
[Mindmuse](#)  
[Pioneera](#)  
[Let's Talk](#)  
[Moodfix](#)  
[Groov](#)  
[Canopy](#)  
[Skodel](#)  
[Readiness](#)  
[YourCall](#)  
[Rely](#)

## PLATFORM AS A SERVICE

[Intervengine](#)  
[Cogniss](#)  
[Springday](#)  
[Lifestreet](#)  
[Wellify](#)

## CONSULTING & TRAINING

[Black Dog Institute](#)  
[Communicorp](#)  
[Aust. Psychological Services](#)  
[AP Psychology](#)  
[Rise](#)  
[Worklogic](#)  
[GLWS Wellbeing](#)  
[Applied Positive Psychology](#)  
[Learning Institute \(APPLI\)](#)  
[Club20](#)  
[The United Project](#)  
[Human Leadership Consulting](#)  
[Aust. Sustainable Wellness Academy](#)  
[Phoenix Australia](#)  
[Grow Together Now](#)  
[Transitioning Well](#)  
[FBG Group](#)  
[Mercer Marsh Benefits](#)  
[Advisory](#)  
[Mapien](#)  
[Elemental](#)  
[Thrive Advisory](#)  
[Aspect Group](#)  
[Insight Health Advisory](#)  
[HSE Global](#)  
[Workplace Mental Health Advisory](#)  
[Workplace Health Centre](#)  
[En Masse](#)  
[Anna Feringa](#)  
[Wellbeing Outfit](#)  
[Corp. Health Insurance Consulting \(Medibank, BUPA, NIB, HCF\)](#)



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# Shortlisted vendors included in review

- Broad feature vendors in the EAP class could meet several critical buyer criteria:
  - Criteria met: Virtual Provider Network, In Person Provider Network, Global, Reporting, 24/7 Phone Line, CIR, Wellbeing Check Tool, Digital Content, Multiple Entry Points, Stepped Care, Executive Specialists, Psychosocial Risk Assessment & Advisory, Trainings & Workshops
  - EAP Vendors: Centre for Corporate Health (CCH), Intellect\*, Converge, Assure, Telus Health, Modern Health, Uprise, Jobfit, Acacia, Workplace Options (WPO), Unmind, Clearhead, Mindfi, Sonder.
- Narrow feature vendors focus on meeting a specialised buyer criterion:

Wellbeing Content	Psychosocial Risk	Trainings	Exec. Specialists
School of life	Mibo	Aspect	Mindstar
Big Think	InCheq	Human Leadership	
Rethink Care	FlourishDx		
Sanctuary Health	Groove		
	Pioneera		

# Table stakes priority features

# Virtual Provider Network

	1. Modern	2. Unmind	3. Clearhead	4. Uprise
Virtual network size	930 in Aust and NZ, 1k+ internationally	2k internationally	1k+ internationally	
Avg time to appointment	0.7 days	1 day	1 day	
Network composition	TBC	10% psychologists, <3% interns, 20% multilingual	30% psychologists, <3% interns, multilingual	
Real-time booking & matching algorithm	Real-time calendar, highly personalised matching or browse	Real-time calendar, highly personalised matching or browse	Real-time calendar, basic matching or browse	
Minimum standards	TBC	TBC	TBC	



# In-person provider network

	1. Converge	2. Clearhead	3. Telus	4. Acacia
In-person network size	930 in Aust and NZ, 95% of population within reach	1k+ in Aust and NZ, 95% of population within 20 mins	1k+ in Aust and NZ, 95% of population within reach	
Avg time to appointment	3 days (metro), 5 days (regional)	3 days (metro), 5 days (regional)	3 days (metro), 5 days (regional)	
Network composition	Psych, social workers, counsellors	TBC	Psych, social workers, counsellors	
Real-time map-based booking & matching algorithm	No real time booking, map based search by presenting issue	Real time booking, map-based booking, basic search by presenting issue	Real time booking, map-based booking, basic search by presenting issue	
Minimum standards	TBC	TBC	TBC	





# Global Offering

	1. Modern	2. Intellect	3. Telus	4. Mindfi
Local / in country provider networks	Coverage for all major countries (including all Westpac locations) except China.	Coverage for 60 countries with providers in 20 countries.	Coverage for most Westpac locations (except Fiji and PNG)	
Large virtual multilingual provider network	Yes	Yes	TBC if available within app	
Consistent/matched global offering for all employees	Yes	Yes	TBC	

# Reporting

	1. <b>Unmind</b>	2. <b>Telus</b>	3. <b>Modern</b>	4. <b>Mindfi</b>
Clinical outcomes	Pre- post-therapy score changes using proprietary measure	Pre- post-therapy claimed but not cited	Pre- post-therapy score changes using industry standard measures	
Psychosocial risks	Basic risk screener in wellbeing check (non Aust. standards)	Flourish-Dx screener available	No psychosocial risk screener	
Utilisation	Detailed utilisation data by business unit, location with presenting themes	Detailed utilisation data by business unit, location with presenting themes	Detailed utilisation data by business unit, location with presenting themes	

# 24/7 Phone Line

	1. CCH	2. WPO	3. Telus	4. Acacia
24/7 (no voicemail or after-hours restricted service)	Yes	Yes	Yes	Yes
Avg time to transfer to therapist 24/7	Immediate	30 sec	Immediate for non-severe, same day for non-severe	50 mins
Operators mental health trained	Yes	Yes	Yes	Yes



# Critical incident response

	1. Converge	2. Sonder	3. Telus	4. CCH
Quality assurance process	Detailed risk management + regular accreditation checks	Process not clear, no evidence of accreditation checks	Detailed risk management + regular accreditation checks	Detailed risk management + regular accreditation checks
In-house vs associate	90% via in house	100% via in house	80% via in house	100% by in house
Specialist CIR leaders + managers	Yes	Yes	Yes	Yes
Minimum standards	3 yrs, Psych First Aid trained	TBC	TBC	TBC

# High priority features



# Wellbeing check tool

	1. <b>Unmind</b>	2. <b>Modern</b>	3. <b>Telus</b>	4. <b>Intellect</b>
Brief & easy to use	<15 questions, good UX/UI	<20 questions, good UX/UI	<15 questions, good UX/UI	
Psychometrically valid/sound	Moderate	Very high	High	
Instand results and feedback	Yes	Yes	Yes	
Recommendations	Yes	Yes	Yes	

# Wellbeing content

	1. <b>School of life</b>	2. <b>Big Think</b>	3. <b>Hey Lemonade</b>	4. <b>Modern</b>
Entertaining	High	High	Low	Low
Evidence-based	High	High	Moderate	High
High production value	High (video)	High (video)	High (audio)	Moderate (video and audio)
Cost	Free-via Youtube	Most free-via Youtube, some paywall content at high cost	Moderate	TBC
Diverse content	Moderate	Moderate	Low	Moderate

# Multiple entry points

	1. Converge	2. Telus	3. Acacia	4. Assure
Phone	Yes	Yes	Yes	
Live chat	Yes	Yes	Yes	
SMS	Yes	Yes	Yes	
Whatsapp	Yes	No	No	
Email	Yes	Yes	Yes	
App	Yes	Yes	Yes	
Teams	Yes	Yes	No	



# Stepped care

	1. Modern	2. Clearhead	3. Intellect	4. Uprise
Low-, mod-, high-intensity triage	Yes	Yes	Yes	Yes
Personalised treatment pathway	Yes	Yes	Yes	Yes
Forced choice, coercion, opacity	No	No	No	No
Emergency/acute pathway	Yes	Yes	Yes	Yes

# Moderate priority features

# Executive specialists

	1. Mindstar	2. CCH	3. Assure	4. Converge
Experienced provider micro-network	Yes	Yes	Yes	Yes
White glove onboarding and support	Yes	Yes	Yes	Yes
Coaching and therapy	Yes	Yes	Yes	Yes

# Psychosocial risk assessment

	1. TBC	2. TBC	3. TBC	4. TBC
Risk questionnaire + analytics dash				
Personalised psychoeducation / user feedback				
Human coaching				
Chatbot coaching				
Human consulting				
Data ingestion / triangulation				



# Trainings and workshops

	1. School of life	2. Aspect	3. Human Leadership	4. Craig Semple	5. Club20	6. Transitioning Well	7. Black Dog
Entertainment	Very high	High	High	Very high	Very high	Moderate	Moderate
Quality / evidence	High	High	High	Moderate	Moderate	High	High



# EAP Vendors: Feature Heatmap

	Unmind	CCH	WPO	Acacia	Converge	Clearhead	MindFi	Sonder	Jobfit	Uprise	Telus Health	Assure	Modern Health	Intellect
Average Score (Essential + High + Moderate Criteria / Low not incl.)	3.4	2.6	2.6	2.1	3.3	2.7	2.3	2.3	2.1	3.0	3.6	2.8	3.3	3.2
Virtual Provider Network	4	2	2	3	3	3	4	2	4	3	4	3	4	3
In Person Provider Network	0	2	2	3	4	4	2	2	2	2	3	3	2	2
Global	5	2	5	2	2	0	4	1	0	0	5	2	5	5
Reporting	4	2	3	3	3	4	2	2	2	3	3	2	4	4
24/7 Phone Line	4	5	5	4	4	3	3	3	4	4	5	3	5	3
CIR	3	3	3	3	4	2	2	5	3	3	4	3	4	3
Wellbeing Check Tool	4	2	1	1	3	4	4	3	0	5	4	2	4	5
Digital Content	4	1	1	2	2	2	3	3	3	4	3	3	4	3
Multiple Entry Points	3	3	3	3	4	3	2	3	2	3	3	3	3	4
Stepped Care	3	0	0	0	0	4	0	3	0	4	1	0	3	3
Exec Specialists	4	5	4	0	5	0	2	0	3	3	4	5	0	0
Psychosocial Risk Assessment	3	4	2	1	5	3	0	0	2	2	4	4	1	3
Care Navigators	0	0	0	0	0	0	0	1	0	0	0	0	0	3
Dietitians	2	0	0	2	2	0	0	0	3	0	3	1	1	3
Coaching	3	0	0	2	2	0	2	0	1	3	1	1	4	3
Nurses	0	0	0	0	1	0	0	4	0	0	3	0	0	0
Doctors	0	0	0	0	0	0	0	3	0	0	0	0	0	0
Exercise Phys.	0	0	0	0	0	0	0	0	3	0	0	1	0	3
Peer Support	0	0	0	0	2	0	0	0	0	0	4	0	0	0
On Site Availability	1	3	3	3	4	0	0	0	1	1	5	5	3	0
Continuity of Care	0	3	0	0	2	0	0	0	0	1	2	3	0	1
Injury Management	1	4	4	0	5	0	0	0	1	0	0	5	3	0

# People Leader Support



Features:  
 general  
 primary

A slide where  
 team can present  
 to other leaders  
 about the support  
 and services they  
 will get to help  
 them or to help  
 with the strategy.  
 Which suppliers  
 can provide  
 services relevant  
 to a leader

	Target User
Average Score (Essential + High + Moderate Criteria / Low not incl.)	
<b>Virtual Provider Network</b>	Staff
<b>In Person Provider Network</b>	Staff
<b>Global</b>	Staff
<b>Reporting</b>	Leader
<b>24/7 Phone Line</b>	Staff
<b>CIR</b>	Leader
<b>Wellbeing Check Tool</b>	Staff
<b>Digital Content</b>	Staff
<b>Multiple Entry Points</b>	Staff
<b>Stepped Care</b>	Staff
<b>Exec Specialists</b>	Leader
<b>Psychosocial Risk Assessment</b>	Leader
<b>Care Navigators</b>	Staff
<b>Dietitians</b>	Staff
<b>Coaching</b>	Staff
<b>Nurses</b>	Staff
<b>Doctors</b>	Staff
<b>Exercise Phys.</b>	Staff
<b>Peer Support</b>	Staff
<b>On Site Availability</b>	Staff
<b>Continuity of Care</b>	Staff
<b>Injury Management</b>	Staff

# Appendix



# Scan methodology

- A callout was sent via LinkedIn to identify all workplace wellbeing suppliers for the Australian market combined with a web search.
- The initial search found 126 suppliers across 11 major categories (see following slide for a list of suppliers by category)
- From the 126 suppliers, 27 vendors met the inclusion criteria as capable of fulfilling Westpac's buyer requirements (both table stakes and high priority features). These vendors were in the Comprehensive EAP or Digital EAP space and were the primary focus of this review.
- Data in this report was verified via interviews with the suppliers, interviews with industry experts who have used the suppliers, supplier website research, online reviews and published research papers from the suppliers.