

# Checklist for Selecting Health Promotion Vendors

Developed by John Harris, M.Ed., FAWHP and James F. McKenzie, Ph.D, M.P.H.

## CODE:

Yes = Yes, the vendor does/did this.  
No = No, the vendor does not/did not do this.  
NA = Not applicable  
NS = Not sure

## 1. Initial Experience With The Vendor

- A. Did the vendor present a good professional image?  
Yes  No  NA  NS
- B. Did the vendor do the necessary homework on your company prior to the initial meeting?  
Yes  No  NA  NS
- C. Is the vendor's philosophy of health promotion consistent with your company's philosophy?  
Yes  No  NA  NS
- D. Can the vendor explain why and how its product/service can meet the needs of your company?  
Yes  No  NA  NS
- E. Did the vendor appear responsive to your company's needs?  
Yes  No  NA  NS
- F. Was the vendor willing to listen to you or was its representative too busy trying to sell?  
Yes  No  NA  NS
- G. Is the vendor willing to make a proposal or presentation to your company?  
Yes  No  NA  NS
- H. Did the vendor demonstrate expertise with regard to the product/service?  
Yes  No  NA  NS
- I. Did the vendor provide you with a reference list of other customers?  
Yes  No  NA  NS
- J. Did the vendor leave written materials that summarize its product/service?  
Yes  No  NA  NS
- K. Does the vendor enjoy a good reputation in the field?  
Yes  No  NA  NS

## 2. Product Quality

- A. Did the vendor provide an overview of its product/service content?  
Yes  No  NA  NS
- B. Did the vendor provide careful documentation of its product/service health or cost impact?  
Yes  No  NA  NS
- C. Does the vendor have evaluative data to support the product/service?  
Yes  No  NA  NS
- D. Does the vendor have data to compare success rates of its products/services to those of its competitors?  
Yes  No  NA  NS

E. Can the vendor provide data which show the adequacy of its products/services with a population similar to yours?  
Yes  No  NA  NS

F. Does the vendor have a written continuous quality improvement plan?  
Yes  No  NA  NS

G. Does the vendor demonstrate sensitivity to the culture of your organization?  
Yes  No  NA  NS

H. Can the vendor provide several different integrated products/services or does it just specialize in one area?  
Yes  No  NA  NS

I. Did the vendor explain the art and or science that produces the results associated with its products/services?  
Yes  No  NA  NS

J. Will the vendor "customize" the product to meet the needs of your company?  
Yes  No  NA  NS

K. Can the vendor offer products/services which meet the special needs of your employees (e.g., reading levels, various levels of health status, languages, cultural diversity, etc.)?  
Yes  No  NA  NS

L. If written informational materials are provided, are they written clearly and presented in an attractive way?  
Yes  No  NA  NS

M. Are the products/services of the vendor up to date with current research, technologies, industry trends, etc.?  
Yes  No  NA  NS

## 3. Professionals Involved With Delivery

- A. What type of education and training do the professionals involved with the product/service delivery have?  
Yes  No  NA  NS
- B. Do the professionals involved in product/service delivery belong to recognized professional associations?  
Yes  No  NA  NS
- C. Are the professionals involved certified by a professional and/or health organization?  
Yes  No  NA  NS
- D. Are the professionals involved required to update their training periodically?  
Yes  No  NA  NS
- E. Is training specific to the products/services the professional delivers provided by the vendor?  
Yes  No  NA  NS
- F. Are the professional-to-participate ratios reasonable?  
Yes  No  NA  NS
- G. Is the performance of professionals delivering products/services audited by the vendor for effectiveness, efficiency, accuracy, etc.?  
Yes  No  NA  NS

#### 4. Product/Service Delivery And Customer Satisfaction

- A. Can the vendor clearly state in writing the products/services that will be provided?  
Yes  No  NA  NS
- B. Can the vendor clearly state in writing the roles and responsibilities of both parties in product/service delivery?  
Yes  No  NA  NS
- C. Is the vendor willing to establish a contract with your organization?  
Yes  No  NA  NS
- D. Is the vendor willing to help market the product inside your company as part of its service?  
Yes  No  NA  NS
- E. Does purchase of the product include measurement, evaluation and reporting?  
Yes  No  NA  NS
- F. Can the vendor appropriately serve the size of your company's population?  
Yes  No  NA  NS
- G. Can the vendor provide the product/service at all sites desired?  
Yes  No  NA  NS
- H. Can the vendor provide the product/service at the times desired?  
Yes  No  NA  NS
- I. Does the vendor provide you with an "account manager" who will take full responsibility for your complete customer satisfaction?  
Yes  No  NA  NS
- J. Does the vendor have a track record of providing similar services effectively to other organizations similar to yours?  
Yes  No  NA  NS
- K. Has the vendor been in business/providing the product/service for at least five years?  
Yes  No  NA  NS
- L. Is the vendor's company well managed and financially sound?  
Yes  No  NA  NS

#### 5. Vendor Technological Capability

- A. Does the vendor possess the technology necessary for the delivery of the product/service?  
Yes  No  NA  NS
- B. Is the vendor up-to-date with the technology it uses?  
Yes  No  NA  NS
- C. Is the computer system and software of the vendor compatible with yours?  
Yes  No  NA  NS
- D. Does the vendor utilize Web-based applications in the delivery of its products/services?  
Yes  No  NA  NS
- E. Are web based applications personalized, interactive, easy to navigate and secure?  
Yes  No  NA  NS
- F. Does the vendor have an adequate "Information Services" department to support the products/services provided?  
Yes  No  NA  NS

#### 6. Evaluation And Reporting

- A. Does the vendor collect adequate and accurate data on the product/service activity and outcomes?  
Yes  No  NA  NS
- B. Is the data the property of the vendor or the customer?  
Yes  No  NA  NS
- C. Does the vendor have written procedures to protect the integrity and confidentiality of the data (including HIPAA compliance)?  
Yes  No  NA  NS
- D. Can the vendor adequately convert data into meaningful reports?  
Yes  No  NA  NS
- E. Can the vendor provide reports and other aggregate data to the customer in appropriate electronic formats?  
Yes  No  NA  NS
- F. Can the vendor accommodate customized data and reporting requests?  
Yes  No  NA  NS

#### 7. Product Cost And Value

- A. Is the cost of the product/service competitive with the cost of other vendors?  
Yes  No  NA  NS
- B. Will the vendor participate in a competitive bidding process?  
Yes  No  NA  NS
- C. Is pricing all-inclusive (no hidden costs)?  
Yes  No  NA  NS
- D. Does the cost per unit go down when the volume of work increases?  
Yes  No  NA  NS
- E. Does the cost per unit go down if additional products/services are purchased from the same vendor?  
Yes  No  NA  NS
- F. Will the vendor agree to performance guarantees (where costs to the customer are reduced if set standards are not met)?  
Yes  No  NA  NS
- G. Does the results of the product/service justify the price? (Is there an adequate value proposition?)  
Yes  No  NA  NS

#### 8. General Concerns

- A. Does the vendor carry adequate liability insurance (as determined by the customer's Risk Management professionals)?  
Yes  No  NA  NS
- B. Does the vendor provide "added value" assistance such as reasonable consulting with senior professionals, without the customer incurring additional charges.  
Yes  No  NA  NS
- C. Is the "chemistry" good between the staff of the vendor and the staff of the customer?  
Yes  No  NA  NS

*For more information contact John Harris at Harris HealthTrends, Inc. at 419-885-5100*