

**At-A-Glance:****Keys for an effective incentive strategy****Identify clinical/health goals and objectives**

- Review population data to determine health needs, gaps and opportunities
- Set goals for participation expectations (e.g., 10% increase in health survey completion)

**Prioritize opportunities and identify activities and outcomes**

- Identify high-priority opportunities (e.g., low participation in preventive exams)
- Select the activities and behaviors that best align with the opportunities (e.g., get an annual exam, complete an age/gender appropriate cancer screening, etc.)
- Consider weighting activities according to their impact potential (e.g., more “value” for completing a preventive wellness exam vs. completing an online health survey)

**Identify potential barriers to success**

- Project what obstacles (history, time, knowledge, etc.) might limit success of incentive strategy
- Start by offering simple fundamental health actions (e.g., health survey) moving towards an approach that encourages health ownership such as incenting for cancer screenings, biometric targets, etc.

**Determine incentive and budget**

- Identify a “meaningful” incentive by getting input from your employees (consider gathering incentive preferences from an employee interest survey etc.)
- Determine total budget for incentives including administration, fulfillment and communication costs each year

**Define incentive rules**

- Determine eligibility requirements, activity start and end dates, amounts to award and reward type (e.g., gift cards, premium reductions, Health Savings Account contributions, etc.)
- Keep it simple—An effective incentive strategy is simple in design, simple to communicate and simple to understand
- Work with your legal counsel to ensure strategy is compliant with existing rules and regulations

**Launch with strong communication plan**

- Design an effective launch plan
- Do not “launch and leave it”... communicate early and often throughout the year