

Making Your Job Easier

What It's Like to Work with Navigate

Maybe you already have a wellbeing partner but aren't completely happy with your vendor. Or maybe you've been thinking of starting a wellbeing program and are worried about the extra burden on your admin team.

Whatever your situation, we thought it might be helpful to give you an idea of what it's like to work with Navigate. What we would do for you (quite a lot!), what would be required of you (as little as possible—that's what we're here for) and how our process works.

Our philosophy: Making it easy for you

We believe that it's our job to adapt to being your wellbeing partner—not the other way around. By configuring your needs, we help to create a wellbeing program that's the right fit.

Our responsive, above-and-beyond service will lighten your load as much as possible—so you can focus on other responsibilities. We don't leave your clients hanging after launch—we set regular touchpoints with every client to ensure we're meeting their needs (and reducing your workload while we're at it).

To make the experience even better, each client is assigned a dedicated Account Manager throughout the relationship with Navigate. That Account Manager—supported by a dedicated team—is the main contact during the implementation process and during our ongoing service.

Getting started

The difference starts right away—beginning with our success-focused implementation process. This process usually takes about 90 days and includes six key milestones. Most of this process is done by the Navigate team.

Discovery and kickoff. This is where we learn more about your needs and goals for a client's wellbeing program. They will get to know their Client Services team, including a Navigate Account Manager and Account Coordinator. Throughout the process the team provides strategic recommendations, confirms program specifics, and provide regular updates.

Portal and program design. Onboarding is a collaborative process that supports the need of the client. Our platform is configurable to make it reflect an organization's culture, organizational values or goals, branding and more. Our custom resource hub allows clients to add links to other important organizational information.

We'll also take a deeper dive into what you want to accomplish with your program and determine program requirements to meet those goals.

Marketing and communications. We want each program to succeed from the start. So, we provide communication materials to help promote a new wellbeing program. We also provide year-round program communications to keep employees engaged all year long.





Review, testing and sign-off. Once a platform is set up, the account management team will provide a live demo of the portal. We'll also answer questions, finalize launch details and finish the communication plan.

Administrative training. Our account management team educates each client on how to use the dashboard to pull real-time data and analytics.

Go live! We'll make the platform live on an agreed-upon date. Of course, our account management team will be in close contact to answer any questions and ensure a successful launch.

“Our organization’s program has lots of details and quirks, and we had multiple questions throughout the process. Our account manager and team were fantastic and always responsive to our requests.”

Tyler Miller, SSOE

Ongoing Support

The implementation process is only the beginning of the support you receive from Navigate. We connect throughout your program to build on the foundations created during implementation. We'll also share details about any upcoming platform enhancements.

The Navigate team will continue to provide year-round support after the portal launches so the transition to the maintenance mode is seamless. They'll also serve as a liaison to our marketing and technology teams.

We're here to support our participants, too. From login assistance to questions about program requirements, using the Navigate app and more, our in-house customer service team provides friendly, confident solutions to participant emails and calls.

“Our Account Manager was very available and helpful if we had questions or needed guidance.”

Kerry Corner, Security Services FCU



At Navigate, our mission is to spread optimism and better the lives of our employees, our customers and the communities we serve.



Let's talk about how we can help your clients.

Contact me to schedule a demo.

www.navigatewell.com

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Wellbeing Solutions