



An Implementation Process Designed Around You

Getting started with IncentFit is simple, flexible, and designed to fit your team's timeline and capacity. There's no rigid rollout model, only the support you need, when you need it. Whether you choose to handle setup in-house or opt for full onboarding support, our process ensures a smooth experience from setup to launch.

What to Expect: Step-by-Step

Below are common examples of what the setup typically includes – though the specific steps may vary based on your program selections.

Step 1: Finalize Your Program Specifics

- Choose your IncentFit product(s)
- Define which activities are rewarded or reimbursed, and set incentive amounts
- Pick a challenge calendar
- Select your fulfillment methods
- Setup escrow or third-party integrations

Step 2: Set Up Eligibility

- Upload your eligible employee list
- Set up a file feed or HRIS integration

Step 3: Launch Your Program

- Do a final review in our pre-launch call
- Set your official go-live date
- Announce the program to employees

Optional Add-On Steps:

Procurement

Contract or Security Reviews

User Experience Enhancements

SSO, Handouts, Webinars, Pre-Launch Presentations, File Feeds, Integrations

Choose the Implementation Style That Fits Your Team

Every organization's rollout needs are different. Whether you're looking for a fast and flexible setup or a fully supported onboarding experience, IncentFit offers two options to match your goals and resources:

Standard Implementation

Our standard implementation is the most common path customers take, designed for teams who are comfortable with managing program setup on their own. With access to a comprehensive onboarding toolkit, project task list, and responsive support you'll have everything needed for a successful launch.

Perfect for:

- HR team with internal capacity and experience.
- Straightforward wellness program designs.
- Faster self-managed timelines.

Guided Implementation

For those looking for a hands-on partnership, our Guided Implementation provides white-glove service from our team. From program planning to launch-day communication support, we'll handle the project management and customizations, so you can focus on outcomes, not logistics.

Ideal for:

- Complex or custom programs
- Larger or highly distributed workforces
- Team with limited internal capacity



	Standard Implementation	Guided Implementation
Finalize Program IncentFit will give a program recommendation.	IncentFit Benefit Specialist will give a recommendation and up to 3 meetings for adjustments.	Additional meetings or strategy sessions.
Eligibility Setup Determine which employees are eligible and how data will be delivered.	Self-service online.	IncentFit engineers assist with implementation.
Fulfillment Setup Configure how rewards will be delivered, including data feeds and/or escrow accounts.	Self-service online.	IncentFit engineers assist with integrations or escrow.
Launch Communications Access to pre-made flyers, FAQs, and guides.	Self-service online.	Custom materials, webinars, and branded communications.
Pre-Launch Call Confirm and finalize everything with a kickoff meeting with our Customer Success team.	Included.	Included.
Post-Launch Call (optional) Optional check-in to review early performance, answer questions, and refine program details.	Not needed for most clients.	30-day follow-up call with a Customer Success team member.
Contract (optional) Choose between a standard agreement or a custom one, depending on procurement needs.	No contract, guided by online terms of service or standard IncentFit contract.	Contract modifications review or custom contract.
Security Review (optional) Review IncentFit's security posture or complete a custom questionnaire.	Security posture document and access to online trust center.	IncentFit engineers answer security questionnaires.
User Experience (optional) Enhance user experience with single sign-on, file feeds, or third-party integrations to automate data flow.	SSO, file feeds, and integrations available via self-serve setup.	SSO and file feeds set up with assistance from IncentFit engineers.

Implementation cost depends on the level of support and complexity of your program. Whether you need full onboarding assistance or just help with specific components, you can select the services that best fit your needs, and only pay for what you use.

Not sure which option is right for you?

Let's talk through your goals and timeline, our team is here to help you launch with confidence.