

B1

Corporate Wellness ONBOARDING SOP

Internal Standard Operating Procedures

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1. Pre-Sales Checklist

Complete these steps before your first meeting with a prospect:

Company Research

- Review company website and About page
- Check LinkedIn for employee count and demographics
- Search recent news/press releases
- Identify industry and wellness challenges
- Note any existing wellness programs mentioned

Stakeholder Identification

- Find HR Director / VP of HR name and contact
- Identify Benefits Manager (if separate)
- Note CFO/CEO for final approval discussions
- Check for Wellness Committee or Champion

Materials Preparation

- Customize proposal template with company name
- Prepare industry-specific talking points
- Calculate preliminary pricing based on employee count
- Prepare ROI projections using their estimated data
- Have case studies ready (if available)

TIP: Spend at least 30 minutes researching before any call. Knowledge of their business builds credibility.

2. Discovery Call Script

Use this framework for initial discovery calls. Adapt tone and questions based on the conversation.

Opening (2-3 minutes)

"Thank you for taking the time to meet with me today. Before we dive in, I'd love to learn more about [Company] and what prompted you to explore corporate wellness options. What's happening in your organization right now?"

Pain Point Questions (10-15 minutes)

- What wellness initiatives do you currently have in place, if any?
- What's working well? What's not meeting expectations?
- What are your biggest concerns about employee health and wellbeing?
- How is absenteeism or turnover affecting your organization?
- What would success look like for a wellness program at [Company]?
- Who else would be involved in this decision?
- What's your timeline for implementing a solution?

Budget Discussion (5 minutes)

"Many companies we work with invest between \$10-20 per employee per month for comprehensive wellness. Have you allocated budget for wellness initiatives? What range would be comfortable for your organization?"

Solution Overview (10 minutes)

Briefly explain BodyF1RST based on their stated needs. Focus on features that address their specific pain points. Don't overwhelm with every feature.

Next Steps Close (2-3 minutes)

"Based on what you've shared, I think BodyF1RST could be a great fit for [Company]. My next step would be to put together a customized proposal showing exactly how we'd approach this for your team. Would [date] work for a follow-up call to review that together?"

IMPORTANT: Listen more than you talk. The discovery call is about understanding their needs, not selling features.

3. Proposal Presentation Guide

Before the Call

- Customize proposal PDF with company name and employee count
- Prepare screen share with proposal document
- Review notes from discovery call
- Have pricing calculator open for live adjustments

Presentation Flow

Slide/Section	Time	Key Points
Recap Discovery	2 min	Summarize their goals and challenges
The Problem	3 min	Industry stats that resonate with their situation
Our Solution	5 min	Focus on features matching their needs
Industry Approach	3 min	Show you understand their specific industry
Pricing	5 min	Show comparison, explain value
Timeline	2 min	Emphasize quick implementation
Q&A	10 min	Answer questions, handle objections

Common Objections & Responses

"It's too expensive"

"I understand budget is a concern. Let me show you how this compares to industry rates—we're actually 40-70% below average. Plus, with the ROI from reduced absenteeism and turnover, most companies see this pay for itself."

"We need to think about it"

"Of course. What specific concerns would you like to discuss with your team? I'm happy to provide additional information or even join a call with other stakeholders."

"We're not ready right now"

"I understand. Many companies start with a pilot program of just 50-100 employees. Would that be more manageable as a starting point?"

"We tried wellness before and it didn't work"

"That's valuable context. What specifically didn't work? Our platform is designed differently, with AI personalization and gamification that drives 85%+ engagement."

4. Contract Execution

Required Documents

Document	Required?	Notes
Master Services Agreement (MSA)	Always	Standard terms, 12-month minimum
Business Associate Agreement (BAA)	If HIPAA data	Required for health metrics
Data Processing Agreement (DPA)	If EU employees	GDPR compliance
Purchase Order	Some companies	Their internal requirement

Pricing Negotiation Boundaries

Use your judgment, but here are general guidelines:

Employees	Standard Rate	Max Discount	Floor Price
1-99	\$15/mo Standard	5%	\$14.25/mo
100-249	\$15/mo Standard	10%	\$13.50/mo
250-499	\$15/mo Standard	15%	\$12.75/mo
500-999	\$15/mo Standard	20%	\$12.00/mo
1000+	Custom Quote	25%	Contact leadership

Signature Process

1. Send contract via DocuSign to primary contact
2. CC their legal/procurement if they request
3. Follow up within 48 hours if not signed
4. Once signed, send welcome email within 2 hours
5. Schedule kickoff call within 48 hours of signature

5. Technical Setup

Complete these steps in the backend after contract signing:

Organization Setup

1. Create new Organization in admin dashboard
2. Set organization name, logo, and branding colors
3. Configure subscription tier and employee limit
4. Generate organization referral code
5. Set contract start and end dates

Coach Assignment

- Assign primary coach based on industry expertise
- Brief coach on company profile and goals
- Ensure coach availability for launch period
- Set up coach introduction in welcome flow

Content Configuration

Select content library based on industry:

- **Entertainment/Media:** Desk-friendly workouts, eye strain exercises, meditation
- **Manufacturing/Engineering:** Safety stretches, lab ergonomics, focus techniques
- **Construction:** Jobsite workouts, injury prevention, mental health
- **General Office:** Standard library with desk-based options

Referral Code Generation

Generate bulk referral codes for employee signup. Format: COMPANY-XXXX (e.g., CATFACE-2024). Provide codes to HR for distribution via their preferred channel.

6. Launch Coordination

Pre-Launch Communications

Work with HR to prepare employee communications:

- Announcement email (send 1 week before launch)
- App download instructions (iOS/Android links)
- Referral code and signup process
- FAQ document for common questions
- Lunch-and-learn scheduling (if requested)

Launch Day Checklist

- Verify all employee codes are active
- Test signup flow end-to-end
- Confirm coach is available for questions
- Monitor signup rates throughout the day
- Send end-of-day summary to HR

First Week Activities

- Day 1:** Launch announcement, initial signups
- Day 2:** Follow-up email to non-signups
- Day 3:** First team challenge begins
- Day 4:** Check engagement metrics
- Day 5:** Weekly summary to HR

Target Metrics (First 30 Days)

- **Signup Rate:** 50%+ of employees within first week
- **App Opens:** 3+ per user per week
- **Challenge Participation:** 40%+ of signed users
- **Coach Interactions:** 20%+ booking intro session (Premium)

7. Ongoing Management

Weekly Tasks

- Monitor engagement dashboard
- Address support tickets within 24 hours
- Check challenge participation
- Update internal CRM with account notes

Monthly Reports

Send monthly usage report to HR contact by the 5th of each month. Include:

- Active users vs total enrolled
- Engagement metrics (sessions, duration, completion)
- Challenge participation and winners
- Coach session bookings
- Recommendations for improving engagement

Quarterly Business Reviews (QBRs)

Schedule 30-minute QBR with HR stakeholders each quarter:

- Review metrics vs goals
- Discuss ROI and health outcomes
- Gather feedback and suggestions
- Preview upcoming features/content
- Discuss expansion opportunities

Renewal Process (Start 90 Days Out)

- 90 days out:** Send renewal reminder, schedule review meeting
- 60 days out:** Present renewal proposal with updated pricing
- 30 days out:** Final follow-up, escalate if needed
- Contract end:** Auto-renew or process termination

Appendix A: Email Templates

Initial Outreach Email

Subject: Employee Wellness at [Company] - Quick Question Hi [Name], I noticed [Company] is growing quickly—congratulations! I'm reaching out because we help companies like yours boost employee engagement and reduce healthcare costs through AI-powered wellness programs. Companies using BodyF1RST typically see: • 25% reduction in absenteeism • 15% improvement in retention • 85%+ employee engagement Would you be open to a 15-minute call to see if this might be a fit for [Company]? Best, [Your Name]

Post-Discovery Follow-Up

Subject: BodyF1RST Proposal for [Company] Hi [Name], Thank you for the great conversation today. As promised, I've attached a customized proposal based on our discussion. Key highlights: • [Address their specific pain point] • [Mention relevant feature] • Investment: \$[X]/employee/month I'm available [date/time] to walk through this together. Does that work for you? Best, [Your Name]

Launch Announcement (for HR to send)

Subject: Introducing BodyF1RST - Your New Wellness Benefit! Team, We're excited to announce our new partnership with BodyF1RST, a comprehensive wellness platform designed to help you live healthier, happier lives. Here's what you get: • Personalized workout plans • AI coaching available 24/7 • Team challenges and leaderboards • Nutrition tracking and guidance Getting started is easy: 1. Download the BodyF1RST app (iOS/Android) 2. Enter code: [COMPANY-CODE] 3. Complete your profile 4. Start your wellness journey! Questions? Contact [HR Name] or reach out to our coach at [email]. [Company] Leadership

Appendix B: Contract Templates

The following contract templates are available in the shared drive:

- **MSA_Template_v1.0.docx** - Standard Master Services Agreement
- **BAA_Template_v1.0.docx** - Business Associate Agreement (HIPAA)
- **DPA_Template_v1.0.docx** - Data Processing Agreement (GDPR)
- **Pilot_Agreement_v1.0.docx** - 30-60 Day Pilot Program Agreement

Appendix C: FAQ for HR

Q: How do employees sign up?

A: Download the BodyF1RST app, enter the company referral code, and complete the profile setup.

Q: What data do you collect?

A: Basic profile info, workout activity, and optional health metrics. All data is encrypted and HIPAA-compliant.

Q: Can employees use this outside work?

A: Yes! The app is available 24/7 and can be used anywhere.

Q: How do we track participation?

A: HR admins get access to an analytics dashboard showing signup rates, engagement metrics, and program ROI.

Q: What if an employee leaves the company?

A: Their account is deactivated when removed from the employee roster. Personal data is handled per our privacy policy.

Q: Is there a minimum contract length?

A: Yes, 12 months minimum. After that, month-to-month with 30 days notice.