RETHINKCARE COMPETITOR COMPARISON

Prepared by: Jennifer Sartor
Date Prepared: 7/29/2025

		RethinkCare	Spring Health	Lyra Health	Joshin
Company Information	Website	https://www.rethinkcare.com	https://www.springhealth.com/	https://www.lyrahealth.com/	https://joshin.com/
	LinkedIn Company Page	https://www.linkedin.com/company/rethinkcare	https://www.linkedin.com/company/spring-health/	https://www.linkedin.com/company/lyra-health/	https://www.linkedin.com/company/joshincare/
	Founded	2007 (18 Years)	2016 (8 years)	2015 (9 years)	2018 (6 years)
	Locations	New York, NY	New York, NY	Burlingame, CA; San Francisco, CA; Los Angeles, CA, New York, NY; Toronto, Canada; London, UK; Sydney, Australia; Berlin, Germany; Tokyo, Japan	North Oaks, MN
	Number of Employees	166 (LinkedIn)	3273 (LinkedIn)	2517 (LinkedIn)	41 (LinkedIn)
	Number of Customers	550+	450+ employers and health plans; 27,000 groups through channel partners	300+	not disclosed
	Named Customers	Volvo	Microsoft, Target, JP Morgan Chase, Delta Airlines, Pfizer, Coca-Cola, BlackRock, Instacart, General Mills, Duolingo, Wawa, Wellstar, Highmark, Nestle, Adobe	Starbucks, lululemon, Morgan Stanley, Genentech, VCA, Zoom, Meta, Pinterest, FirstBank, JE Dunn, Walmart	Best Buy, Dropbox, Hearst, Boston Scientific
	Fortune 100 Reach**	30+ companies (Source)	not disclosed	not disclosed	not disclosed
	Number of Lives Covered	7M+	10M covered; 5M direct members	20M covered; 2M direct members	not disclosed
	Partners	Optum, Personify			CuraLinc Healthcare Partners
Target Populations Covered	Adult employees	Yes	Yes	Yes	Yes (Limited focus on caregiving and ND)
	Children / dependents (ages)**	Yes (strongest), children 1+ years	Yes, children 0+ years with 2022 acquisition of Weldon but some employer programs specify coverage for children 6+ (Adobe 2024)	Yes, children 0+ years via COE for Pediatric Mental Health (Source)	Some services for children 0+ via partnership with Vivvi childcare
	High-acuity / high-risk populations	Yes, developmental disabilities, autism	Complex care programs (Source)	Specialty care programs	Yes, high needs individuals
	Caregivers / parents**	Yes, Parental Success solution	Yes, Family Care solution	Yes, Caregiver Assistance Program	Yes, disability caregivers
	Neurodivergent individuals**	Yes	Yes, via Neurodiversity Hub	Yes, COE for Neurodiversity	Yes
	ERG groups (DEI, cultural, affinity, etc.)	Yes		Yes, tools and consultation support	Yes, tailored content, toolkits, and action plans
	Disabled persons	Yes	Yes	Yes	Yes (Hearst example)
	People with Chronic Conditions	No	No	Yes, COE for Chronic Conditions	No
	Women's Mental Health	No	No	Yes, COE for Women's Mental Health	
Clinical & Coaching Services	Licensed Therapy (# of therapists)**	Yes, BCBAs, # not disclosed (a few dozen)	6,000+ therapists, CARF-accredited	25,000+ provider network 3,900 providers specializing in child/teen mental health	Caregivers and Coaches, # not disclosed
	Coaching (life, executive, parenting)	Yes, 1:1 live coaching (parenting, workplace)	Yes, self-guided tools	Yes	Yes
	Board Certified Behavior Analyst (BCBA)**	Yes, Core differentiator - Master's Doctoral BCBAs (Source) All BCBAs must have: • 315 hours of behavior analytic coursework • Hold a master's and/or doctorate level degree • At least 5 years of experience working with ND population • Completed 2000 hours of supervised fieldwork • Once hired, all BCBAs must complete extensive training and complete 32 hours of CEUs every 2 years.	No (may be able to refer members to BCBAs)	Yes (only 1 mention) Lyra Coaches: • Have an accredited ICF coach training program + complete Lyra's CCE ICF- accredited onboarding • Must have at least 100 hours of coaching to apply • Over 50% of Lyra coaches have graduate degrees and have over 5 years of experience coaching. Lyra Therapists: • Have an average of 10 years of counseling experience • Must also hold a master's-level education or above • Must use evidence-based treatments	No (care navigators may be able to help locate BCBAs)
	Psychiatry / medication management	No	Full medication management	Full medication management	No
	Crisis support	No	Yes, 24/7 crisis line, CARF-accredited	Yes	No
	EAP Integration	Yes (Source)	Replaces traditional EAPs (Source)	Replaces traditional EAPs (Source)	Not specified
	Care plans / goal setting	Yes	Yes, tailored, actionable care plan recommendations	Guided self-care	Self-guided care plans
	Booking Timeframe	Within 48 hours guaranteed	Within < 2 days guaranteed	1 day average	Not specified
Neurodiversity & Disability Support	ND Center of Excellence	No formal COEs	No formal COEs; launched Neurodiversity Hub in June 2025 Fully integrated into Spring Health platform	Yes, COE for Neurodiversity	No formal COEs
	ND Assessments/Evaluations	No (*designed to be inclusive for all, with or without a diagnosis)	Yes (Nationwide pediatric and adolescent neuropsychological evaluations launched June 2025)	Yes (Clinical neuropsychological assessments, ASD/ADHD diagnosis (children/adults), both in-person/virtual). Lyra clinicians assist with locating in-network providers, aiming for wait times less than 6 months.	No
	Formal ND diagnosis req to use	No	No	No	
	Support for ND individuals	Yes, self-guided content + BCBA consultations 2,000+ 'how to' training modules and digital assets 250+ sessions targeting workplace neurodiversity	Yes - via Neurodiversity Hub (add # of content pieces)	Yes - limited?	Yes
	Support for caregivers of ND individuals**	Yes, self-guided content + BCBA consultations. Parents can invite their entire care team to join RTC, allowing teachers, medical providers, other caregivers to participate in consultation calls and ensure a unified support plan. BCBAs can help parents understand their rights regarding their child's education, including how to navigate IEPs and 504 plans	Yes - 100+ age-specific resources for parents, teens, children, eldercare	Yes	Yes

Category	Feature	Column 1	Column 2	Column 3	Column 4
	Workplace accomodation guidance	Yes, Professional Resilience training	Yes - limited	Yes	Yes, specialized coaching
	Manager training & Neuroinclusion programming	Yes, self-guided ND workplace training content + BCBA consultations 200+ self-guided digital, sessions on interviewing, self-advocacy, communication, and emotional intelligence catering to managers and leaders	Yes - limited Yes - limited	Yes	Yes, manager training programs
	Trained ND coaches / specialists**	Yes (Master's/doctoral BCBAs)	Some providers support ND (*see Reddit posts)	Some providers support ND	Yes
	Evidence-based ND interventions	Yes (*ABA methodology)	Yes, standard therapy approaches	Yes, evidence-based therapy	Yes
Digital Experience	Self-guided content	Yes, *50k+ unique content offerings, with 100 mini-courses and thousands of sessions, tips, and printable materials	Yes, via Moments a library of 150+ self-guided CBT exercises	Yes, Lyra Essentials content (volume not disclosed)	Yes, digital resources and training (volume not disclosed)
	Personalized content journeys	Yes, *BCBA-driven individualized support plans	Yes, Precision Mental Healthcare using 3-5 min clinical assessment that screens for 12 conditions, and ML to provide personalized recommendations. Members can also work 1:1 with Care Navigators.	Yes, AI-powered personalization	Yes, personalized navigation
	Mobile app	Yes	Yes	Yes	Yes
	AI	TBD	TBD	TBD	TBD
	Gamification	No (progress tracking)	No (progress tracking)	No (progress tracking)	No
	Family/household member accounts	Yes, family-centered approach	Yes, including dedicated teen experience		Yes, must be aged 2+ to access
	Multi-modal user intake (screening, needs mapping)	Yes, needs/goals survey and BCBA-driven needs assessments	Yes, 3-5 min clinical assessment screens for 12 conditions (PHQ-9, GAD-7)	Yes, clinically-validated symptom measures (PHQ-9, GAD-7, and PSS), questionnaires digital self-assessment tools	Personalization survey only
Global Coverage & Utilization	Global service availability (# countries)	225+	200+	200+ (Largely via 2022 ICAS acquisition)	1 (US)
	Languages supported	11 platform languages (English, Spanish, French, German, Japanese, Portuguese, Polish, Korean, Chinese, Italian and Hindi) 11-12 languages spoken by BCBAs (English, French, Spanish, German, Mandarin, Somali, Portuguese, Gujarati, Hindi, Urdu) + live translation into 180+ languages	57+	60+ (languages spoken by providers) 21 (platform translated into)	1 (English)
	Region-specific clinical networks	Yes	No (But embeds workplace care teams within client sites in Changi, Singapore; Tokyo, Japan; Toronto, Canada; Cancun, Mexico; Montreal, Canada; Sao Paulo, Brazil; Mexico City, Mexico; Paris, France; Amsterdam, Netherlands; and London)	No?	N/A
	Global coaching availability	Yes	Yes	Yes, via Lyra Health International (formerly ICAS)	N/A
	Cultural adaptation/localization of content	Yes	Yes, limited to localized clinical programming, events, webinars	Limited	N/A
	Local regulatory compliance	Yes	unknown	Yes, via Lyra Health International (formerly ICAS)	N/A
	Global reporting and analytics support	Yes	unknown	unknown	N/A
Enterprise Features	Admin portal with utilization + outcome reporting	On-demand reporting on utilization, pre-post clinical assessment results, BCBA utilization (NPS, top areas of concern, diagnosis if disclosed, referrals). Utilization and outcomes reporting to track engagement, satisfaction, and trending topics. Pre- and post-engagement assessments offer insight into employee stress and confidence levels.	Atlas: real-time admin dashboard for HR Compass: EHR system unifies outcomes reporting	Empower: real-time admin dashboard for HR, includes medical/claims savings reporting, AI-driven insights for optimizing program engagement	Real-time admin dashboard to monitor member registration, participation rates, coaching session usage, digital program engagement, and community event attendance,
	Claims integration / data sharing	In progress	Yes, integrates with medical plans for coordinated benefits, shared health data, claims impact reporting	Yes, Lyra Link Automated claims/utilization reporting available for ROI and healthcare spend tracking	Yes
	Eligibility file ingestion	In progress	Yes, automated eligibility file management for large employers and partners	Yes, automated eligibility file management as part of enterprise rollout with platforms like Alight; supports regular updates and HR system sync	No
	Promotion support	Yes, pre-built and customizable toolkits with email templates, flyers, digital signage, tipsheets	Yes, customizable communication toolkits and launch materials (emails, posters, digital banners) , champion and manager training	Yes, provides anti-stigma campaign toolkits, email templates, posters, videos, and digitized resources. Offers Customizable Workshops & Educational Sessions, HR & Champion Enablement	Yes, Personalized Launch Kits, live training for managers and employees, co-branded campaigns, newsletters
	Custom branding / white-labeling	Some, custom branded registration page	Employer co-branding available / No white-labeling	Employer co-branding available / White-labeling rare and limited to select implementations	Employer co-branding available / White-labeling rare and limited to select implementation
	Integration with other benefits (EAPs, LMS)	Yes	Yes (can replace EAPs, integrate with LMS, etc.)	Yes, Lyra Link integrates with EAPs and other wellness benefit providesr	
	SSO	Yes	Yes	Yes	Yes
	Customer/user support	24/7 Dedicated User Support Team via phone, email, online forms, typically resolves issues within 48 hours	24/7 Support Care Team provides support via phone, live chat, and email	24/7 support by phone, email	Support (hours not specified) via chat, email and phone
	Security Compliance	Hitrust	SOC II, Hitrust, CARF Accreditation Trust Center	SOC II, ISO27001, Hitrust, Trust Center	not disclosed
	Implementation timeframe	30-60 days	2-6 weeks	2-6 weeks	A few weeks to several months
Outcomes & Impact Measurement	Wellbeing improvement	Pre- and post-engagement assessments offer insight into employee stress and confidence levels.			Self-reported outcome data showing member satisfaction, goal accomplishment, and improvements in well-being or caregiving confidence.
	Clinical outcome measurement (PHQ-9, GAD-7)	No	Integrates measurement-based care using tools like PHQ-9 (depression) and GAD-7 (anxiety) at intake, throughout treatment, and at discharge. This enables tracking and reporting of clinical symptom improvement (JAMA)	Routinely measures anxiety and depression symptoms using GAD-7 and PHQ-9 in their blended care program. They monitor improvement, reliable change, and remission at 12 and 24 weeks, with data published in peer-reviewed venues (Source)	No
	Claims reduction reporting (BH/ND claims)	No	Yes	Yes	No

	Retention/promotion/absenteeism impact reporting	No	Yes	Yes	Some customer testimonials
	ROI calculators or models	In progress	Yes (Net ROI PG), Validation Institute Certification	Yes	No
	Claims made	91 NPS for RTC consultations, 90%+ of employees reporti that RethinkCare helps them 83% of participants say resources accessed through Rethink helped reduce their stress or anxiety 80% of participants attribute Rethink resources to helping them be more present at work, leading to increased productivity	9.4/10 member rating for providers	9 in 10 users improve ROI is 3:1 or better 10x engagement vs. traditional EAPs	68% of users report improved productivity and wellbeing through support and goal setting 52% voluntary disclosure of disabilities/ND at work
Financial Overview	Ownership Structure	Private	Private	Private	Private
	Estimated Revenue	$25.6M (2024)	$625M (2024)	$183.4M (est)	Not disclosed
	Total Funding	$22.5M	**$470M Total** Series C: $190M, 2021 Series D: $71M ($2.5B valuation), 2023 Series E: $100M ($3.3B valuation)	$900M+ Series F: $235M, 2022	$3M
	Latest Valuation	~$1.5B (2022 est.)	$3.3B (July 2024)	$4.6B (2021)	Not disclosed
	M&A	TheraWe: telehealth, parent engagement (2020) Whil: Wellness content (2021) ABA Therapy Billing & Insurance Services (2023)	Weldon: Family wellness (2022) Bloom: Wellness content, 700 videos (2023)	ICAS World: Global EAP (2022) Bend Health: Pediatric care (2025)	None
SWOT Analysis	Strengths	Deepest ND expertise, content and resources (aka "the gold standard in ND care") Global BCBA clinicians Superior ability to solve for access and quick intervention/care path vs the slow barriers in the care system/EAP Supeior ability for ND members/caregivers to choose a provider who resonates with them	Bundled or low-cost EAP add-on No separate contract/setup needed End-to-end ND support (screening to ongoing care) Simple EAP-based promotion Eligibility file ingestion for targeted outreach Claims data integration for ROI reporting	Bundled or low-cost EAP add-on No separate contract/setup needed End-to-end ND support (screening to ongoing care) Simple EAP-based promotion Eligibility file ingestion for targeted outreach Claims data integration for ROI reporting	
	Weaknesses	No in-person support Stale parenting content No eligibility files to drive promo/targeting (yet) No claims integration to prove ROI/Impact (yet) Requires separate EAP purchase (2 contracts, 2 budgets)	Lack of BCBAs / ND specialists; Lack of global ND solution Members have less control when choosing providers; more of a referral model	Lack of ND depth; Lack of global ND solution Members have less control when choosing providers; more of a referral model	No global (non-US) capabilities
	Opportunities		Add BCBAs; Extend ND Hub globally;		
	Threats	Churn to good enough, check-the-box ND solutions from Spring & Lyra which are easy to purchase wi/out 2nd contract & implementation			Churn to good enough, check-the-box ND solutions from Spring & Lyra which are easy to purchase wi/out 2nd contract & implementation
	Misc notes:		Found possibly 3 BCBAs on staff via LI: https://www.linkedin.com/in/tori-stitt-099268112 https://www.linkedin.com/in/kelly-alessandro-5350b9191/ https://www.linkedin.com/in/kristy-caamano-3599968a	Found only 2 BCBAs within Lyra's employee base on LI: https://www.linkedin.com/in/stephanie-anyakwo-lmft-bcba-504157205 https://www.linkedin.com/in/pamela-mckenna-bcba-lba-05999b6	Found 1 BCBA on staff via LI: https://www.linkedin.com/in/selina-bernal-805b48132