

WHITE PAPER ON CORPORATE WELLNESS ROUNDTABLE

How should the corporate wellness industry move forward with programmes that benefit everyone?

8th October 2014



On 8th October 2014 the leading wellness company, Technogym, brought together a group of influential academics and industry experts for a discussion on corporate wellness.

The first half of the conversation explored the role of return on investment (ROI): the group considered what is meant by ROI in this context; the challenges of measurement; and how much ROI influences companies who are considering corporate wellness programmes.

In the second half, attendees were asked to contribute their ideas on the most effective ways to implement corporate wellness programmes, and to identify the key factors that influence success.

This white paper documents the discussion and sums up the group's conclusions. The overarching aim is to share expert opinion that can inform future approaches and help drive more effective corporate wellness provision in the UK.

CHAIR: Sue Pritchard, Aditi Unlimited

PARTICIPANTS: Anna Daniels, Founder, Daniels Fitness
Clayton Green, McLaren Human Performance Programme Manager
Dr L Dorian Dugmore, CEO Wellness Academy & Director of Corporate Wellbeing, Perform at St Georges Park International Football Centre
Fabrizio Cecchinelli, Marketing Manager HCP, Technogym International
Gillian Pillans, Research Director, Corporate Research Forum
Professor John Buckley, Programme Leader, Department of Clinical Science, University of Chester
Dr Michael Grey, Reader in Motor Neuroscience, University of Birmingham
Roya Bartlett, Wellness and Health Promotion Manager, EMEA & APAC Johnson & Johnson

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Foreword



The cost to business and to society of ill health and injury is increasing. Recent estimates on the cost to business and government of occupational injury and illness is in excess of £30billion, while the broader costs of 'underperformance' in work could cost more than double this sum. But whose responsibility is it to act on this? Government? Business? Or is it an individual's responsibility to look after their own health?

The answer, of course, is that sustainable change across society will require the concerted efforts of all three. Government can provide public health messages, personal and corporate incentives; and individually, we each have to make changes to unhealthy lifestyles in ways that work for us.

However, forward looking organisations have always recognised that since so many working practices (such as long hours, sedentary work, stressful conditions) are themselves a known cause of ill health, then companies have a moral, practical and commercial imperative to mitigate these effects.

This 'white paper' challenges some of the accepted barriers to considering and implementing 'corporate wellness' programmes and offers some well researched, tried and tested methods for introducing them into organisational life. Five key messages struck me.

1. You need to understand where people are starting from – what are the drivers for change? It's important to understand the culture and the concerns of the organisation (or sector) – from the board room to the shop floor – and to appreciate the particular drivers and messages that will work.
2. Once you know the starting point, you can build a case for change in a way that will resonate with that organisation. Set out a clear business case, which draws on the extensive research and speaks in the language and culture of the organisation.
3. Have a practical plan of action which sets out the steps needed. Recognise that for some organisations – and for many individuals – small steps are crucial in creating an experience of success, and the will to keep going.

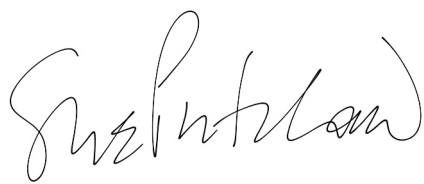
4. Build in evaluation from the start and utilise a range of measures – quantitative, such as days lost through ill health, and qualitative that includes attitude surveys, employee health and wellbeing profiling, stress and resilience profiling plus delayed demographics of the business location and its surrounding geography.
5. Variety works. Organisations are full of people with different interests, needs and motivators – what works for some will not work for all; one size rarely fits all, so adapt, adjust and vary approaches depending on what's needed.

These are very practical and achievable actions.

I want to extend my thanks to the contributors, who were thoughtful and generous in offering their expertise and experiences. We benefitted from the perspectives of those who've researched health and wellbeing for decades, alongside others who have led the field in implementing ground breaking initiatives in organisation settings.

I would also like to commend Technogym, the Wellness Company, for their very valuable initiative in initiating this roundtable discussion and bringing together so many noted figures in the world of corporate health. Amidst widespread concern over obesity, stress, resilience in the face of rapid change, economic instability and a growing interest in protecting the wellbeing of employees as a key corporate asset, this discussion was both timely and invaluable in providing much needed insight into this area.

Finally, thanks to Wilma Tulloch, whose excellent notes from the discussion have come together in this clear and comprehensive 'white paper': I'm delighted to recommend it to all organisations who want to improve wellness and wellbeing in the workplace – and ultimately across society.

A handwritten signature in black ink, appearing to read 'Sue Pritchard', with a stylized, cursive script.

Sue Pritchard, Roundtable Chairperson

INTRODUCTION TO THE ROUNDTABLE

On 8th October 2014, a group of experts from business and academia met at Technogym's UK headquarters to discuss corporate wellness and the keys to success in corporate wellness implementations.

The starting point for the discussion was an examination of the role of ROI in corporate wellness. It emerged that the group felt that defining, let alone measuring, the ROI of corporate wellness was problematic. The consensus, moreover, was that ROI doesn't play a central role in 'selling' corporate wellness to companies. The discussion then moved on to the success factors in delivering corporate wellness implementations. These include:

- a close understanding of the prevailing organisational culture and the need to tailor and communicate programmes accordingly;
- the need to begin with an evaluation of the company's current 'wellness' status and continually revisit it throughout the programme;
- the importance of quality personnel to lead programmes; and
- the criticality of a strategy that works top-down and bottom-up, to achieve meaningful engagement.

The conversation also touched on who within the organisation should lead on programme implementation, and how programmes should go 'beyond the factory walls' to include families, communities and customers. Participants also shared examples of approaches and specific programmes that had proved successful. The group's discussions are summarised here.

PART ONE: THE ROLE OF ROI

The trouble with ROI

To begin, the attendees asked what, in the context of corporate wellness, is meant by ROI? After all, 'returns' might be quantified in terms of their physiological and psychological impact on the individual, and the social and financial impact on the company. For the purposes of this discussion, the group was asked to focus on the financial return – but that immediately raised more questions. How can all the components of investment be quantified across all the elements of commissioning, designing, launching and running a programme, and how is the return to be measured?

It was noted that the majority of corporate wellness ROI data comes from the USA. This is because US employers are responsible for workers' health insurance, and insurance premiums provide a concrete metric. In the UK and elsewhere, employers have no responsibility for health insurance, so little data of this kind exists.

Other kinds of data are also difficult to acquire. One measure is reduced absenteeism, but pre-programme absence rates have sometimes not been recorded systematically. Other conventional parameters are increased staff retention, greater productivity or engagement, enhanced company reputation and contribution to corporate and social responsibility (CSR) policies. However these can be difficult to quantify and this 'top-down' perspective excludes the employees' experience, which might include increased job satisfaction, better personal health and an enhanced sense of overall wellbeing. Some companies chose to capture this data through employee surveys but the question set used may not focus on the part of an employee's overall wellbeing which is determined primarily by work and which can be influenced.

It was also noted that in today's working environment, employees typically hold 19 – 21 jobs in the course of a career. As a result, the benefits of a particular corporate wellness programme might not fully manifest until after the individual has left the organisation.

In summary, an accurate and meaningful financial measurement of ROI was deemed hard to obtain in the UK healthcare context. The group acknowledged that there is a lot of discussion about ROI, and that business leaders often request such evidence when considering investing in Corporate wellness programs. "The best companies", one participant noted, "don't worry much about ROI – they take it on faith that there is a return".

- Among organisations running corporate wellness programmes in the UK, 60 per cent aren't measuring ROI, 36 per cent say they are working on it, and only 4 per cent had worked out their ROI.

The true corporate incentives

If not ROI, then what are the drivers of corporate engagement with wellness programmes? The consensus was that initial engagement is much more likely to be driven by organisational values and philosophy than by numbers.

Other important factors are the role corporate wellness can play in enhancing organisational reputation, in attracting talent and retaining staff, and even in encouraging former staff to return. Also, increasingly, organisations want to implement CSR policies and corporate wellness can be seen as a useful component of CSR.

Finally, corporates have a growing interest in happiness indexes: a signifier of a contented, motivated and energised workforce. Happiness indexes are more holistic and go beyond health and wellness, but there's nevertheless a clear correlation with corporate wellness. So the desire to increase 'happiness' provides yet another driver.

As an aside, no one believed that companies are indifferent to the impact of programmes. The group noted that many organisations have a performance driven culture and will want to find ways to benchmark a programme's performance and generate metrics that

resonate with senior managers and decision makers. “People do look for hard metrics”, noted one participant. However, the group cautioned against corporate wellness ‘falling into the hands of finance’ – which is the direction a traditional ROI approach takes you – pointing to the need to find different metrics that key decision makers will value. These might include a HAPI index, information from staff surveys or data on churn, for example. The group also mentioned that measuring key cardiovascular and lifestyle risk numbers are also important with hard data, not just questionnaires. The group agreed that companies should measure their wellbeing numbers alongside their business numbers.

PART TWO: WHAT YIELDS SUCCESS WHEN IMPLEMENTING CORPORATE WELLNESS

What does best practice in corporate wellness look like?

First, what is ‘corporate wellness’ as opposed to ‘health promotion’? The group defined corporate wellness as an ongoing sustainable programme that includes the regular collection and evaluation of data. This contrasts with ‘health promotion’, which is characterised by discrete short-term initiatives, where limited or no data is gathered.

The group also believed that it is necessary to develop a template that defines what best practice in corporate wellness programmes should look like. Development would take concerted work by an expert advisory panel, but in the interim the group’s ideas on best practice suggest that corporate wellness programmes should certainly include:

- **An audit that develops a company baseline profile.** The data to be gathered might include key biometric indicators like BMI, glucose and cholesterol levels, as well as information on physical activity, nutrition, stress, alcohol consumption, tobacco smoking, sleep, work/life balance and hydration. The audit should also assess what attitudes prevail across the company and what interests and motivates the organisation.
- **Identifying the issues that the programme wants to address and its overall objectives.** Every company needs to define wellness in terms that are meaningful to it, and in terms of what it does. Using the profile and established baselines, programmes need to reflect the organisation, its needs and context.
- **Careful design, build and implementation.** The programme should be designed by experts and communicated in a way that complements the organisation’s culture.
- **Regular evaluations.** These are vital to measure the programme’s progress and impact against its original profile and objectives and include behavioural change.

What are the success factors in corporate wellness implementation?

The group strongly believed that best practice processes will only yield results if practitioners pay attention to the success factors of corporate wellness implementation. Their ideas on what brings success covered culture, evaluation, quality and strategy, with culture seen as the most important.

1. Culture

To be successful, programmes need to connect to a company's culture, beliefs, strategy, vision and values, and overarching mission. As well, a strong understanding of the culture is a way in to understanding what motivates both participants and key decision makers.

■ Communication

An understanding of the culture also guides how programmes should be communicated. "Communication is crucial", said one participant. "That's where it can all go terribly wrong." For example, some corporate cultures – particularly those that are predominantly male – focus heavily on performance. In such cultures, it was suggested, presenting a programme as 'performance enhancement' rather than 'wellness' will likely achieve a higher level of buy-in and better outcomes. Language is also important. Managers may be uncomfortable with a programme that addresses 'stress management' (because they can be seen to be the cause of that stress). The same programme packaged as 'optimising performance' may prove more acceptable.

In some cultures, engendering competition could prove highly effective, building teams and rivalries as a way to stimulate participation. However, note that teams can be exclusive as well as inclusive.

It was also suggested that corporate wellness communications could have greater impact if they were much more robust – instead of portraying 'pretty images of healthy people' campaign images should reflect the realities of health risk behaviours leading to increased employee engagement and willingness to commit to behaviour change.

■ Trust

Cultural sensitivity also helps address the issue of trust. Practitioners in the group noted that employees are often uncomfortable with the idea of their employer gathering their health data. It raises privacy and data security issues, and in some places, concerns about civil liberties. People also want to know how the data is going to be used, if it will be shared with their boss, if it goes on their record, how it will affect their future with the company, and even if it will be used against them. Programmes need to pay attention to how data, including anonymised data, is collated and analysed. Strategies have to be communicated thoughtfully and trust carefully built.

■ Changing cultural norms

Most important of all, sensitivity to culture also helps bring about the change to cultural norms that sits at the heart of the most successful programmes. One attendee noted: “What we should be moving towards is cultural change. We need to effect that cultural change or we’ll go nowhere.”

Cultural change leads to changes in behaviour. However, many programmes can meet a lot of resistance when trying to embed behavioural change. For example, in many organisations it is the cultural norm to take the lift and employees can be quite resistant to doing otherwise. However, signposting the lifts as being for people with disabilities can shift that behaviour.

Likewise it was noted that in Denmark, 80 per cent of office workers have adopted sit-stand working practices – an approach that is proven to have many health benefits. However, as of now, sit-stand is not a cultural norm in the UK.

2. Evaluation

Gathering serial data is essential to achieving a good picture of how well a programme is meeting its objectives. Yet organisations are typically poor at establishing an initial baseline and conducting regular evaluations. These evaluations will typically include health and wellness data, and might also include asking people about their perceptions of the programme. Using external evaluators, from the start, may be useful.

3. Quality

The quality of programmes is extremely important. Good programmes are sustained, accessible and long-term.

The group also believed that the best results come from programmes run by experts, so the quality of the people who deliver corporate wellness is crucial. Organisations who say, “The doctor, nurse, physiotherapist or first-aider can do this” are likely to fail.

Experts are needed to deliver strong evidence-based programmes, and they are particularly necessary for designing programmes that move from reactive to proactive interventions. To address the need for experts, and to professionalise the discipline, Universities should be working with the corporate sector to develop specific education programmes for corporate wellness. This will produce good quality people and push a higher standard of information into corporate wellness. Experts and standards are also needed for effective programme measurement.

4. Strategy

The group firmly believed that successful strategies are implemented ‘bottom-up’ as well as ‘top-down’. Involvement of the management team and Board are fundamental, and leadership behaviour profoundly influences culture and cultural change. In addition, programmes should talk to the workforce that it seeks to engage, not least because they give different answers. The management team, for example, might be reluctant to acknowledge the need to tackle stress management, but this might be a major concern for the workforce. Programmes should aim to reach employees at all levels of the organisation through adopting a communications strategy which considers the differing levels of health literacy.

■ Champions

Corporate wellness champions can be vital in engaging the workforce. For instance, one individual was featured in a company’s annual review testifying that its corporate wellness programme saved her from dying from cancer because it was caught earlier that it could be treated. Another individual with cardiac disease credited the corporate wellness programme with saving his life. He had been very resistant to the programme but had eventually realised that with a wife and two daughters, ‘this wasn’t just about me’. These stories can have a powerful impact.

■ Ambassadors

Internal ambassadors can create groups and activities. Wellness volunteers can be recruited to spread programmes. For example, one practitioner ran a staff fitness centre and trained some staff members to become exercise instructors. Ambassadors can engage people as their own healers, using just a few experts to guide the many.

Who should lead corporate wellness?

Leadership was identified as vital to successful implementations, not only from senior management but also line managers. Line managers need to identify concerns early and be equipped with the necessary skills – such as empathy – to tackle issues effectively. They also need to be empowered to deal with issues. For example, many line managers perceive that they have little or no control over their staff’s stress levels, so it would be unrealistic to expect them to take that on without support.

For now, HR and occupational health personnel are generally the gatekeepers of corporate wellness. They need support to understand corporate wellness objectives and bring about behavioural change. In the future, the group believed that large organisations will increasingly have dedicated corporate wellness managers and directors. Smaller organisations could share the resource of a wellness facilitator – an approach already used in HR.

Corporate wellness beyond the factory walls

Finally, many corporate wellness programmes aspire to go beyond the factory walls. Healthy eating, taking more exercise and smoking cessation have beneficial impacts on employees and their families and the wider community. Some corporate wellness programmes take a broader role to achieve a broader impact, and engagement can include the organisation's customers as well. Also corporate wellness can be designed as part of a wider CSR programme that embraces community involvement, for instance in fundraising initiatives.

CORPORATE WELLNESS IN PRACTICE

In the course of the roundtable, the participants recalled specific corporate wellness initiatives they had used or had heard about. This list captures some of these ideas.

1. One well-known brand leader found that its corporate wellness programme was so highly valued it brought former employees back to the company.
2. One international motor racing company looks at the heart health of its drivers and all other employees and their families.
3. In Canada, 'whiplash interventions' get people back to work in half the time – cutting absences from eight weeks to four. This saves around £1,500 per person.
4. One company wanted its employees to use the stairs and not the lift. It realised its stairwells were grey and dingy. The company repainted them in brighter colours and added some inspirational and motivational messages, to great effect.
5. One organisation measured the behavioural change in its employees' attitude to their own 'vital statistics'. In the beginning, 85 per cent didn't want to know their numbers, but after a communications programme, 86 per cent did want to know their cholesterol and blood pressure levels.
6. One practitioner has found health kiosks very valuable for introducing corporate wellness. Employees step in to the kiosks for evaluations, which are then used to create baselines for the company, develop objectives and implement solutions.
7. Another practitioner ran a staff fitness centre and engaged staff in the programme by training some to become exercise instructors.
8. Eighty per cent of the employees at a particular company took too little exercise, so walking 'passports' and pedometers were introduced, and each employee was challenged to walk the same distance as a walk to Rome via Paris. The passports documented each employee's mileage. Maps on the office walls charted everyone's progress, and those who managed two miles a week were entered into a prize draw. The initiative was hugely popular in engaging people in the simple concept of going for a walk. It achieved 87 per cent compliance, and six couples won long weekends in Paris and Rome.

9. A 'Fun Fit Friday' was introduced at the end of the working week. This comprised team sports competitions and brought people back into the sports and gym environment. It proved very popular and useful in getting more people involved.

TALKING POINTS

In the course of the roundtable, several talking points arose which are captured below.

1. What is the role of compulsion? It was noted that in some areas – smoking cessation and seat belt use for example – behavioural change had been driven by legislation, and the group briefly considered the role compulsion might play, while acknowledging that it can bring up accusations that people's rights are being infringed.
2. What role can government play? It was suggested that government could make corporate wellness tax efficient or supply a tax rebate – a move that could, said one participant, "really turn the dial" on the adoption of corporate wellness programmes.
3. Anecdotally, the question of ROI has been seen as an excuse not to adopt corporate wellness. "Very often the people that ask about ROI are people who don't want to know," said one practitioner. "They don't want to adopt it and don't want to acknowledge it within the company, so they use ROI as a way to avoid adoption."
4. The group identified that it's important to "work upstream on the intervention". So instead of treating stress, it suggested that managers ask why employees are stressed in the first place and change the environment. Giving people control over their work environment is very important.
5. Companies typically want a 'quick fix' within 12 or even six months. Ideally, organisations should be thinking longer term – between three and five years. Any longer and the effectiveness of employee churn means that managers will in many cases be measuring a different population.
6. There is a large social element to many corporate wellness programmes, so increasingly social media can be used to communicate with and engage employees.
7. The Agile and Scrum approaches are often used to manage projects in certain businesses [e.g. Information Technology]. The approach is to assign goals every two weeks, then undertake 'sprints' to achieve them, and assess the results. This can be a useful way to keep up with change.

SUMMING UP

The roundtable challenged the idea that ROI might be an important factor in the way companies decide to adopt corporate wellness. Company culture and values were seen as much more important. When it comes to implementing corporate wellness, organisations should be thinking about the needs of their population and how those relate to the business's mission and objectives. They need to decide where they want to make a difference, especially where the budget is limited. Above all else, corporate wellness needs to work within the organisation's culture and environment. The quality of what is delivered and who delivers it is also crucial. And continual evaluation needs to be built in to the plan, as does a top-down, bottom-up strategy.

Corporate wellness is likely to become more and more important to organisations, as individuals spend more years of their lives at work than ever before. There will be an increasing need to develop the expertise and standards that professionalise wellness provision, to deliver a healthy future for all.

QUESTIONS FOR THE READER TO CONSIDER

1. What will be the best way to 'sell' corporate wellness in my organisation?
2. What are the barriers to programme success in my organisation?
3. What is the unique culture and environment of my organisation?
4. What systems can we put in place for regular programme evaluation?
5. What will be the best way to maintain the programme over time?
6. How can we best deliver a difference?
7. What interventions does my employee population most need?
8. How can we ensure that the right calibre of people with the right qualifications are involved in developing the programme?
9. How can we ensure that our strategy is both top-down and bottom-up?
10. What will success look like?

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Global Partner of



www.technogym.com

Technogym UK Ltd.
Two The Boulevard, Cain Road, Bracknell RG12 1WP

Tel: +44 (0)1344 300236
Email: UK_Info@Technogym.com