

# Business Resilience Arrives The Wellbeing Market Matures



The vast corporate wellbeing market has a long history. In the 1800s, companies invested in health benefits and company housing to keep employees close to their factories, reduce plague, and improve conditions at home. Since that time, organizations have invested billions of dollars in health and wellbeing programs in every possible discipline—from fitness and diet to mental health, mindfulness, and sleep. The market is now over \$61 billion globally in size; it grew almost 11% since 2020 and is fueled by a consumer market well worth over \$300 billion that's growing even faster.<sup>1</sup>

A growing market tends to attract new ideas. Today we are tracking more than 300 companies that sell apps, training programs, diagnostics, classes, and many types of benefits. And each company, in its own way, contributes to employees' wellbeing, health, and overall fitness at work.

In the early days, benefits managers purchased these programs, largely with the purpose of reducing the cost of absenteeism and high rates of insurance. Additionally, companies buy employee assistance programs (EAPs), coaching programs, and counseling services to prevent crises, help people under stress, and support leaders as they move up the corporate pyramid.

Our research shows that over time these “benefits” programs evolve (see figure below). These programs start as benefits and measure ROI through reductions in healthcare costs and employee satisfaction. Next, as the programs become well accepted, companies expand their offerings and start to think about “wellbeing” as employee retention, recruiting, and engagement tools. Finally, as these investments mature, companies look at wellbeing programs in a holistic way, focused on driving performance, productivity, and energy at work.

However, each company evolves at a different speed. Small fast-growing companies might provide these offerings as recruitment tools; large manufacturers may look at them as safety and health programs; and big companies often look at them as a part of the total reward system.

The pandemic, however, has radically shifted the focus in terms of benefits offerings. Not only do we need to keep employees healthy, safe, and protected but also, we now need to help them adapt to constant disruption. All over the world employees are under stress, and the uncertainty and stress of change has caused burnout. So, a new paradigm has emerged: a corporate focus on *resilience*.

### The Evolution of Health and Wellbeing



Source: The Josh Bersin Company, 2021

<sup>1</sup> 2021 Wellbeing Market and Trends, Josh Bersin, Ann Stevens, and Nancy Vitale/The Josh Bersin Company, 2021.

## What Does Resilience Mean?

*Resilience* refers to an organization's ability to respond, adapt, and thrive under stress. In some cases, the stress is financial; in another case, it's an accident or business interruption; and in yet another case, it's a global pandemic. If you think about the topic strategically, resilience also refers to your company's reservoir of energy for change, growth, and transformation.

A part of our Healthy Organization research, we completed a series of interviews with large organizations and identified a significant move in the direction of resilience. While most companies have increased investments in wellbeing and safety programs, the fastest-growing areas are coaching and mental health; resilience is now part of the strategy. Using tools like meQuilibrium, the vendor who sponsored this research, we see an opportunity for change.

## Resilience Is a Muscle, Not a Program

As you think about building your company's ability to adapt to stress, change, and disruption, there are four issues to address:

### 1. Readiness

Have you "inoculated" your team, so it is *ready* when massive change occurs? In the military, for example, there are regular exercises to teach people to respond to loss, surprise, or high stress. The military teaches soldiers to learn to sleep, manage their energy, and build problem-solving skills so they can assess any situation clearly, regardless of the surrounding pressures. Are you doing any related training or exercises within your company, and regularly preparing people for change?

At IBM, for example, in the 1980s, the company reorganized itself every year. If you asked your boss, "Why do we keep doing this?" his response was usually in the lines of "because it's good for you." The message was this: Learn to be adaptable and avoid getting too familiar with the current state. While IBM has suffered many challenges since the 1980s, it continues to adapt and thrive as a global powerhouse today.

### 2. Risk Detection

Great organizations (the military included) have systems to alert leaders when stress creates risk. In the case of corporate wellbeing, this may be individuals "checking in" with a tool like meQuilibrium, so both their leaders and HR can see when a group is under stress. Just as the public health system monitors outbreaks and high-risk locations, we should be monitoring stress and poor performance in real time.

We had a conversation with a benefits leader at a large consumer goods company. This leader told us that one of their biggest challenges was "low levels of management and supervisory skills" in areas like distribution, manufacturing, and logistics. Managers are often ill prepared for their jobs and some teams just "blow up" when leaders are out of their safety zone.

Most of these leaders wanted nothing to do with "wellbeing programs," but once they were offered programs in "resilience" and "strength over time," they took notice. They see the resilience strategy as one that helps them perform, so they are using the diagnostic tools and self-management practices to help them lead. This gives the company insights into low levels of management skills and provides "risk detection" at scale. In the case of meQuilibrium, risk detection at scale is also achieved through its intelligent navigation capability that seamlessly routes flagged employees at risk to targeted resources within the employer's ecosystem.

### 3. Cultural Commitment

The third issue to address when it comes to business resilience is cultural: embedding wellbeing and resilience into every business process. It's now common, for example, to see CEOs take fitness challenges or join in a popular competition. At JPMorgan Chase & Co. the wellbeing team has created local ambassadors in every major city around the world. These ambassadors localize the principles of wellbeing and resilience and monitor stress and risk at the local level. These ambassadors have power in the organization, and they communicate about available programs, monitor health and resilience, and make sure local teams are aware of the program.

Organizations like Genentech offer flexible work options and a wide variety of programs to improve sleep, wellbeing, and even family life. Salesforce offers a tapestry of more than 90 different wellbeing programs to its employees. And companies like Spotify regularly monitor wellbeing to improve retention and productivity in their engineers.

This cultural commitment goes beyond a focus on individuals, looking at “organizational resilience” as well. IBM, for example, has evolved its wellbeing into management development. The company has marched up the maturity curve in this area for years, and now it formally teaches leaders how to lead in a safe, empathetic, and healthy way. Companies like CIBC and others teach leaders about mental health in a formal way, and CEOs now tell stories of growth, adaptability, and change. Ford, as you will read in *Lessons from the Frontline*, teaches leaders about care and empathy as a core value.

## 4. Data and Analytics

Finally, as we learned from the interviews with meQuilibrium clients, is the need for real-time data. It is not sufficient to take a quarterly snapshot and see how many people consumed different benefits and what their five-star ratings have been. Companies like Genentech, Pepsico, and IBM have near real-time data on leadership readiness, obtained from daily check-ins by their teams. meQuilibrium has built tools to monitor this data, and it can show “red zones” in any team, geography, or business unit. Early in the pandemic, companies struggled to understand where the virus was strongest and where employees at risk. This type of real-time data is now available in most organizations, so companies can add resilience data to their dashboards.

## Resilience Is a Strategy, Not a Program

As we talked with meQuilibrium clients and continue to study this issue, it became clear that resilience must be much more than a program. It should be a CEO-supported company strategy.

A good analogy is the way “safety” is treated in oil companies, utilities, and manufacturers. These companies have safety

training, procedures, and metrics. They “think safety” from top to bottom and try to infuse safety into every decision. (Diversity and inclusion is similar). At Exxon, for example, there is a “safety minute” at the beginning of every meeting.

Why don't we treat business resilience the same way? If you want your company to thrive and adapt, it is not just enough to keep people well. We also need to show them how we deal with stress, give them opportunities to stretch themselves and learn, and deliberately practice change even when things are good. Business resilience is a company imperative.

During the pandemic, we conducted a large research project to identify which companies, industries, and geographies responded the fastest. And what we found is that among many other factors, the organizations that rebounded fastest were companies that already had a culture of purpose, agility, and change. These companies had built a “muscle” around survival under stress and had experience with reorganizations, as well as lots of focus on management development and familiarity with job transition, reskilling, and flexibility.

## Conclusion

The past decade has been a nearly nonstop onslaught of disruption in the workplace. Some disruptions are internal, sparked by industry transformation or leadership change; some are external, driven by powerful technologies or global crises. We've learned that while some of these changes are within our control, just as many are not. Resilience is imperative to the healthy organization, to prepare for whatever comes next. Business resilience has arrived.

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Some leading companies are well on their way to building business resilience. Organizations like Centura Health, Ford, and Genentech have made great strides in fostering readiness among their workforce and leaders. These leading companies are committed to strengthening their culture, leveraging data, and analytics to drive impact. Let's look at their stories in more detail on the following pages.

## Centura Health Fosters a Resilient Mindset

Centura Health is Colorado's largest regional healthcare network, operating 17 hospitals and nearly 200 affiliate provider offices and urgent care centers. With 20,000 associates, the organization supports the health and wellness needs of more than half a million people in the state each year. This faith-based company's vision is to foster whole and healthy communities, neighborhoods, and lives.

Inside the company, Centura has long committed to support the wellbeing of its people; however, it had a very traditional wellness program, which originally focused heavily on outcomes and biometrics, with only basic mental health support available. However, in 2017, guided by the organization's whole health approach with patients, the HR team recognized the need to do so with employee health as well. "Our program was robust, but it lacked the whole person, emotional, and spiritual health piece," said Christy Ewing, Enterprise Wellness Program Lead.

The company began having conversations about resilience and quickly learned that many clinical and nonclinical staff were not feeling supported or emotionally durable enough to take on new challenges. The company realized it needed a way for associates to feel connected, and a way for them to feel meaning and purpose in their lives. To help with its goal of business resilience, Centura partnered with meQuilibrium in 2017 to offer a platform for building readiness.

A prime example of cultural commitment, organizational, and personal resilience is now a central focus for the team. "Resilience is really intertwined into everything for us. It's a mindset, a way of showing up in the world, and we as a company have a huge responsibility in supporting personal resilience by fostering organizational resilience," said Ewing.

Today meQuilibrium is available to every employee in the Centura organization, and the workforce has really embraced the solution. Nearly 40% of people are actively interacting

with the content. Clinical staff engage with the app on mobile devices while the rest access the platform on the desktops that are available throughout the company sites.

Ewing noted there are some challenges that they continue to address in their unique healthcare environment. Language is a prime example. For many workers in their environmental and nutrition services segments, English is a second language. To address this barrier, Centura leveraged the solution's broad language and localization capabilities to offer it in both English and Spanish. The company is also working to ensure that employees in these divisions have access to reliable computers in the flow of their work.

Awareness is another ongoing priority for Centura. "A lot of people just still don't know about meQuilibrium, so we're continually working to get the word out, and to build more and more useful resources," says Ewing. "I'm confident that as we move forward, people will just keep seeing how great the platform really is."

The insights that the solution has delivered for the organization are only helping to spread the word. Because the personal health assessment is clinically validated, there is real credibility among senior leaders in the organization, many of whom are healthcare professionals. "When I'm presenting to our behavioral health director, this matters. The fact that we can use that assessment to show our risk scores and how our overall resilience is improving is really fantastic," said Ewing.

The results are already clear. Ewing noted that regular reports on burnout risk have informed her team and HR leadership on exactly where they need to support their people. "We know that taking just one right step can help you flourish, and it creates a domino effect to all these other areas of your life."

## Ford Motor Company Develops Resilient Leadership

Headquartered in Michigan, Ford Motor Company is an American automobile manufacturer with over a hundred years of innovation to its name. Employing nearly 200,000 workers around the world, the company is striving to live its purpose: to help build a better world, where every person is free to move and pursue their dreams. As Bill Ford, Executive Chair, puts it, “Ford is a family company, and we stand together even when times are tough. For 118 years, our values have driven us to do the right thing and be there for one another . . .”

With such a legacy, it is not surprising that Ford is leading the way when it comes to cultivating resilience in their people, their leaders, and their business. In 2020, the company spent time refining and evolving its business strategy and core values. Care for Each Other is one of the four core principles, known as Ford+ behaviors. Now, as they emerge from the global pandemic, the company is reimagining leadership development with a focus on care.

“We’re working with the benefits team to co-create supports for every single Ford leader. We’ve crafted the message to include self-care and care for others, which has transitioned into resilience. We were initially going to wrap this into our wellbeing strategy with mental health, but we realized it’s a very important topic on its own,” said Jill Sochor, Global Leadership Development Manager at Ford.

Sochor went on to say, “The most important message that we want everyone to understand is, it’s not a static situation. It may be a day-by-day situation. And on some days, you’re

going to feel better and therefore you have more to give to others. And some days, you need to scan yourself and focus on you.”

With this philosophy in mind, the company has invested in a series of educational experiences and engagements where every people leader is invited to join senior executives to reflect on the meaning of care and resilience and to learn about what it means to “show, not tell.” And to help support the over 15,000 managers and executives in building readiness, the company is tapping into meQuilibrium’s wide variety of content to curate self-guided learning that teaches leaders how to care for both themselves and their teams.

“What I love about the meQ curriculum is the variety of content it has. We bring in the ‘cup of calm,’ the meditations, the breathing apps, the upcoming webinars, and even the research. All of it,” said Sochor. “And our leaders love to pick and choose what’s right for them—snack-size resilience learning.”

And while Ford’s leaders build knowledge and proficiency in self-care, the leadership and wellbeing teams can leverage the aggregated data and insights from the platform to understand what’s happening across the organization, and where managers may need extra support. “We can tell where there are pockets of strength and where there are areas of opportunity.”

## Genentech Commits to Business Resilience

Genentech, now a member of the Roche Group, is an American biotechnology company that dedicates itself to scientific research and discovery in the pursuit of lifesaving medicines. Headquartered in San Francisco, the company developed the first medicine for primary progressive multiple sclerosis and discovered the first targeted antibody for cancer.

Employing nearly 25,000 people worldwide, Genentech has a comprehensive and holistic benefits program and senior benefits managers collaborate across the company to continuously support and refine each aspect of the overall strategy. Mental health and resilience are a priority for the company, which recognizes that stressors can come from a variety of places. For example, recent questions at executive town hall meetings have revealed employees are concerned with the growing threat of climate change and are experiencing anxiety and depression as a result.

Josh Freund, senior manager of mental health for Roche and Genentech employees in the U.S., shared a starting point, “We’re really trying to help people have the language they need to talk about mental health—how to have a dialogue where you’re expressing your feelings and emotions in an open way without fear of retaliation or threat.”

In 2020, Genentech partnered with meQuilibrium to offer education and tools to employees to help build resilience. To encourage active engagement, the company offered \$50 to everyone who enrolled and completed the initial health assessment. This demonstration of commitment to employee wellbeing had an impact: the company now has 60% of its U.S. population in on using the solution.

To continue to increase that initial enrollment, and to encourage ongoing engagement with the services offered on the meQuilibrium platform, Genentech is looking at

incentivizing reassessments and implementing the manager insights tool. Manager insights will give Freund visibility into teams that may be at risk of burnout, or where managers could use additional support. “What we want to start looking at and helping managers see is if emotion regulation is low in their people organization, for example. There are tools and supports to help them manage through that, before it becomes a productivity or retention issue.”

Given the usage by such a sizable percentage of the population, they were able to get a handle on a growing burnout issue that was simmering through meQuilibrium’s data and insights and get out in advance of the problem. Working to drive the highest level of participation gets the most complete data picture.

Genentech has also added a high-touch aspect to their resilience strategy in the form of a thriving group of mental health champions. A temporary, dedicated role that anyone in the company can apply to and be trained in, this network of 220 employees works locally with managers, teams, and peers.

Freund shared that the company’s overall focus on mental health and the results of the data are indeed noticeable. In fact, the company has used the data to inform corporate policy at the highest levels of the organization, which resulted in introducing extra, companywide time off to mitigate the risk of burnout. “We’ve seen that when people engage with the platform consistently, their resilience scores, the measure of their readiness to tackle challenges, goes up. And high enrollment right out of the gate gave us a meaningful level of data to actually make some decisions and take action on.”

## About the Author



### Josh Bersin

Josh founded Bersin & Associates in 2001 to provide research and advisory services focused on corporate learning. He expanded the company's coverage to encompass HR, talent management, talent acquisition, and leadership and became a recognized expert in the talent market. Josh sold the company to Deloitte in 2012 and was a partner in Bersin by Deloitte up until 2018.

In 2019, Josh founded the Josh Bersin Academy, a professional development academy that has become the "home for HR." In 2020, he put together a team of analysts and advisors who are now working with him to support and guide HR organizations from around the world under the umbrella of The Josh Bersin Company. Recent research covers topics such as hybrid work; HR technology market trends; employee experience; and diversity, equity, and inclusion. He is frequently featured in publications such as *Forbes*, *Harvard Business Review*, *HR Executive*, *The Wall Street Journal*, and *CLO Magazine*. He is a popular blogger and has more than 800,000 followers on LinkedIn.

## The Josh Bersin Company Membership

Members of The Josh Bersin Company have exclusive access to all research reports, case studies, definitive guides, and market studies. Research-based tools including maturity models, frameworks, strategy guides, and assessments help members take action.

To ensure personalized relationships, members have assigned client success managers to maximize the value of our offerings and facilitate connections with analysts and advisors. Members also can take advantage of our upcoming SuperClass Series, courses designed specifically for leaders and senior professionals to address major HR challenges such as organizational design and scaling corporate learning.

The company's Insights events give members early reviews of upcoming or just-published reports as well as deep dives into specific topics of interest. Members can also participate in the Big Reset, an initiative started at the pandemic's onset that offers senior leaders the opportunity to collaborate and share experiences related to the business and workforce challenges of the moment.

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