

# Case study

Supporting a client to drive financial wellbeing and implement a 'hire to retire' financial education programme



1,700 employees – Education sector - One main site



## The ask

- Our client had become frustrated with their incumbent adviser, whose service levels had dropped over time and would only focus on specific areas of their workforce
- Financial wellbeing was becoming more important to our client, as part of the wider pillars of wellbeing they were building upon
- It was clear to them that they needed to focus on financial wellbeing, and provide a more proactive approach to engaging their staff
- They were keen to drive awareness of their pension scheme and wider employee benefits, plus provide access to education, guidance and advice for their staff
- Support our client with 1-2-1 guidance sessions for their staff



## The aims

- Engage employees with their financial wellbeing by providing education across all career stages
- Introduce new employees to the benefits of the pension scheme
- Provide employees with tailored pensions guidance via 1-2-1 clinics/ health checks
- Support employees with individual enquiries when required
- Provide a central online hub where employees can access quality financial planning information, tools and support
- Take the administrative burden for events away from our client
- Monitor feedback and data analytics to demonstrate improved employee financial wellness to key stakeholders



## Our actions

- Launched a bespoke financial wellbeing eLearning hub including access to pensions information, bite-size videos, interactive tools and events
- Implemented an events booking system to allow employees to register for workshops and 1-2-1s, taking the admin burden away from our client
- Set up a dedicated financial wellbeing mailbox for individual employee enquiries
- Arranged a series of on-site 1-2-1 clinic days to make it easy for employees to obtain financial guidance. These were to be held annually around pension statement time
- Delivered a regular programme of workshops to support employees across all stages of their career
- Supported our client, using our communications tool-kit, with content, posters and email templates to drive engagement
- Supported benefits fairs and ad-hoc events to drive awareness of the programme

## Results



**>1300**  
employees  
booked on all  
events



**89%**  
recommended  
the programme



**87%**  
Overall  
satisfaction



**74%**  
Increased  
confidence  
to act



I think our account manager is superb and has made the process of rolling out the financial wellbeing strategy here seamless.

