

Case study

Building on a long-term relationship with a global energy business



FTSE 100
company



80,000
employees
globally



5,000
employees
in the UK



A presence
in more than
70 countries



The ask

- All aspects of employee wellbeing have been a long-term and core part of this client's culture and operating model
- We have worked with the client for a number of years providing a full financial wellbeing programme
- The client carried out a complete market benchmarking exercise and holistic benefits review
- The client launched some new benefits, including a revised DC pension
- The client wanted our ideas for extending the financial wellbeing programme to better support financial health, increase engagement to reflect their new benefits and to meet the needs of their complex employee demographic



The aims

- To provide a programme that incorporated 24/7/365 on-demand learning
- To reshape the online topic based content to reflect the current benefits and employee needs
- To launch a specific programme to help employees understand and use the client's DC pension for all ages
- To include prompts and access to one to one support to really drive confidence and change



Our actions

In addition to continuing to provide career stage seminars and a programme of topic based webinars:

- Created a bespoke online financial education hub that seeks to raise awareness in all areas of personal finance and all the client benefits including links to all relevant benefits and portals
- On-demand library of videos, animations, recorded webinars and case studies
- Created content addressing key life moments such as planning for a new home
- Dedicated pension engagement roadshows across the UK
- To help with one to one queries, we added a financial guidance helpline
- We run an annual calendar of bite-size engagement communications



Results

- The company won the first ever REBA Employee Financial Wellbeing Award for the programme
- 73% of employees used the online education hub following re-launch, compared to 32% in the previous year
- 88% more employees than the same period in the previous year engaged with webinars
- A 122% increase from the previous year in the number of employees who booked onto seminars
- 92% employee satisfaction with the service, 97% would recommend to colleagues
- +83 Net Promoter Score - significantly above the industry average, indicating exceptionally strong employee loyalty
- Positive workshop feedback: "Excellent overview and thought provoking, just the right amount of detail for an introduction"

Client feedback

Our comprehensive financial education programme helps colleagues understand what support is available and how to get the most out of it. It is a key pillar of our overall wellbeing strategy, and I'm really pleased to see increasing numbers of colleagues benefiting from it.