

Case study

Redesigning a financial wellbeing programme following a corporate merger



Education Sector



3,100
employees in the UK



4
sites in the UK

The ask

- Having provided successful financial wellbeing programmes to two separate companies, these clients merged and needed a full programme redesign and relaunch for the combined entity
- The merged client has a significant number of staff who are hybrid working as well as production line shift workers
- As part of embedding the merger, the client wanted to reinforce their focus on employee wellbeing and adding new employee benefits that would help boost financial wellbeing
- The client was keen to give their people a programme they could access in the office and at home
- Having the knowledge of, insight and data from the financial wellbeing programmes provided to each of the separate businesses was hugely beneficial to the client, helping to provide evidence of demand, engagement and focus

Outcome

- A new financial wellbeing programme was launched, including:
- A new financial wellbeing hub, accessible anytime with resources on a range of financial matters to support every employee and every life stage
 - An on-demand library with animations, videos and a range of recorded webinars
 - A rolling programme of live career based and topic based events
 - Events, content and communications were coordinated to tie-in with and enhance the client’s wellbeing calendar
 - Our workplace mortgage advice service was introduced as a new employee benefit, including webinars and 121 clinics
 - The client was delighted with the new programme, the added mortgage advice service and employee engagement at relaunch
 - Employee feedback was extremely positive, with high satisfaction levels and good employee engagement

Results



90%

employee satisfaction rating for the programme overall



44%

of employees used the online hub within the first 12 months after launch



88%

of employees would recommend the programme to a colleague



3%

of employees sought 121 financial guidance

“Excellent knowledge and understanding. The feedback from our employees has been incredible for both the webinars and drop-in events.”

Corporate client



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