

Case study

Evolving a mature financial wellbeing programme



FTSE 100
company



5,000
employees in the UK



Oil and gas



Presence
in 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 and we have provided a full financial wellbeing programme for many years
- Following a market benchmarking and benefits review exercise the client introduced some new benefits, including a revised DC pension
- They wanted to evolve their financial wellbeing programme with the principal aims being:
 - To increase engagement with financial wellbeing
 - To incorporate content and support with their new benefits
 - To provide a programme that included 24/7/365 on-demand learning alongside 121 interactions to make the programme accessible to all within their complex employee demographic
 - To reshape the topic-based content to provide dynamic support to help employees with topical issues and common life events
 - To launch a DC pension engagement programme for all employees UK-wide
 - To include regular prompts and access to one-to-one support to really drive confidence and change

Outcome

- In addition to continuing to provide career stage webinars, 'at retirement' workshops, and a rolling programme of live topic based webinars, the new programme also included:
 - A bespoke online financial education hub that sought to raise awareness in all areas of personal finance and for all the client's employee benefits including links to all relevant benefits and portals
 - An on-demand library of recorded webinars together with short, bite-sized videos
 - A series of case studies covering both welcome and unexpected life moments - with each highlighting the key financial planning considerations -an action plan and links to relevant tools and further support
 - Pension engagement roadshows across the UK aimed at those starting their pension savings journeys, those wanting to boost their retirement planning throughout their career and those in their 10 year countdown to retirement
 - A dedicated financial guidance helpline to help with one-to-one queries, and to provide access to financial advice
 - A calendar of regular 'stay in the loop' emails for continuous engagement on topical personal finance

Results

The new programme won the company an industry standard Financial Wellbeing Award



73%

of employees used the online education hub following re-launch



122%

increase in employees booking onto live events compared to previous year



97%

of employees would recommend the programme to colleagues

“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.”

Corporate client – UK country lead



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