

# Case study

Maintaining engagement with an established financial wellbeing programme



FTSE 250  
company



3,700  
employees in the UK



52  
Offices

## The ask

- In late 2023, we worked with a long-standing client to refresh and relaunch their established financial wellbeing programme
- With a widely dispersed employee base, and a majority now hybrid working, the client was keen to offer 121 support as well as online and web based services
- Recognising the ongoing difficult economic environment, the client wanted to continue offering support to all employees on a wide range of personal finance issues. However, they also felt it was particularly important to provide support to specific employees including retirees, and those with mortgages, especially those facing rising mortgage costs and the challenges of the fixed-rate mortgage ‘timebomb’



## Outcome

- In addition to our online financial education hub and a fully stocked on-demand webinar library and financial fitness test, the programme was enhanced with:
  - A live webinar programme targeting a range of personal finance topics, including their employee share schemes, pension awareness and help for those struggling with cost of living (including mortgages)
  - Access to our UK-wide programme of at retirement workshops, that include both financial and lifestyle aspects
  - Monthly ‘stay in the loop’ engagement emails
  - Adding our workplace mortgage advice service as an additional employee benefit
  - A programme of face-to-face 121 guidance clinics in the larger offices
  - A dedicated helpline to provide 121 financial guidance for individual employee queries, and those unable to attend events

## The results speak for themselves...

In the first two months after relaunch:



12%

increase in new users to the hub



14%

of employees signed up to our ‘stay in the loop’ emails



3%

of employees accessed financial guidance/advice via 121 sessions, the financial guidance helpline and the mortgage advice service



93%

overall employee satisfaction with the programme

“Great hour which will save me a lot of money!”

Employee service user



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