

# Case study

Providing a financial wellbeing programme to a global professional services firm



**24,000**  
employees in the UK



**19**  
UK locations



**A 'big 4'**  
professional services firm

## The ask

- Unhappy with their trials with different financial wellbeing providers, this firm conducted a formal market selection of UK providers
- Their principal requirements were that the service would deliver informative, engaging, technology-enabled financial content and education which could be accessed 24/7 by all their people, wherever they may be in the UK
- Their key objectives for the new programme and provider were:
  - Increase their people’s understanding that supporting employee financial wellbeing is an important aspect of the firm’s overall wellbeing strategy and approach
  - Improve their people’s financial awareness, enabling more informed financial decisions
  - Improve awareness and increase in the uptake of key employee benefits
  - Increase the firm’s knowledge of their people’s financial concerns
  - Ensure their employees receive quality, expert guidance and access to advice
  - To work with an organisation who are proven experts in workplace financial wellbeing and who would provide exceptional services and account management

## Outcome

- The selection process shortlisted three providers who were assessed by a panel of reward, engagement, communications, HR and procurement professionals, with the final selection also involving a trial by an Employee Panel of 30+ from across the business
- Our workplace financial wellbeing services were selected and the programme launched included:
  - A bespoke version of our online education hub, available 24/7/365, accessible via any device, containing details of the firm’s full range of employee benefits together with comprehensive resources and guidance on the full range of personal finance topics, life moments, videos, animations, a well-stocked recorded webinar library and links to third party resources
  - A rolling programme of bespoke live webinars including career-based and topic-specific events plus events and panel discussions to coordinate with the firm’s annual wellbeing calendar
  - A dedicated financial guidance helpline for employees to access 121 support at any time
  - Interactive financial fitness test, enabling individuals to measure and understand their own financial fitness and to direct them to areas/topics that needed most attention
  - A programme of regular ‘stay in the loop’ emails to continue to engage employees on an ongoing basis

## Results

Since its launch:



**30%**

of employees have used the hub



**13%**

have booked onto a live event



**87%**

employee satisfaction with the services overall

“The speaker explained everything very clearly, especially the more complicated bits about pensions, so that was highly appreciated.”

Employee service user



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