How to

Engage Your Employees in Your Financial Wellness Program

One of the greatest challenges employers face implementing a successful financial wellness program in their workplace is getting and keeping employees engaged. From the very beginning of the selection process, make sure you understand your employees’ financial needs and select programs that meet them where they are.

Make sure your program\(^1\) does the following:

- **Addresses the financial needs of your workforce.**
  Conduct a needs assessment before selecting a program to understand what financial services/products will benefit your workforce the most. The best and easiest way to understand what your employees need is to ask them. This can be done through surveys, interviews/focus groups, or even using existing administrative data.

- **Has an effective champion.**
  Your program needs to be effectively promoted within your organization to generate interest and awareness. Champions of successful programs come from leadership (especially locally), Human Resource departments, or even frontline employees who have used the program and act as ambassadors. Internal champions work closely with their program provider to make sure all of a program’s benefits are advertised accurately and at appropriate times and places within the organization.

- **Is accessible and easy to use.**
  Consider how easily your employees can access and use the program. For instance, will the program be available on-site and/or during work hours? Do employees understand how to access and use services, particularly programs with mobile/online components that may require some technological skill?

- **Is integrated into established systems and routines.**
  When possible, integrate services or products into existing organizational routines like onboarding procedures, payroll systems, etc. to ensure that the program is actively promoted and sustainable.