Get Internal Buy-In for Your Financial Wellness Program

You’ve decided that your organization is a good fit for a financial wellness program, but now you need to get upper management on board with the idea. Successful workplace financial wellness programs have the full backing and support of leadership behind them.

While every company is different, here are a few common strategies to increase buy-in from leadership:

✓ **Do your research.**
You don’t have to recreate the wheel. You may already have benefits providers serving your workforce who can help you navigate the process. There is also research that can help you understand and communicate the potential benefits of a program. Here are a couple to get you started:

• *Workplace Financial Wellness Services: A Primer for Employers*¹
• *Employee Financial Wellness Programs: A Review of the Literature and Directions for Future Research*²

✓ **Know your needs.**
Once you understand the value of offering a program, the next step is to understand challenges and concerns specific to your workforce. Conducting an assessment of your employees’ financial needs will help in two key ways. It will help you find the right services for your organization and communicate to leadership why a financial wellness program is needed.

✓ **Find your fit.**
Not all workforces and workplaces are alike, so it is important to remember that some financial wellness programs may be a better fit for your organization than others. For guidance on how to find a program suitable for your organization, see *How to Select a Financial Wellness Program.*

✓ **Be prepared.**
Make sure you understand your program and be ready to answer challenging questions from leadership. For advice on how to answer tough questions, see *Workplace Financial Wellness Services: A Primer for Employers.*

This document is part of the Employee Financial Wellness Programs (EFWP) Project at the Center for Social Development.

¹ [https://csd.wustl.edu/Publications/Documents/T17-33.pdf](https://csd.wustl.edu/Publications/Documents/T17-33.pdf)