Things You’ll Need for
A Successful Financial Wellness Program

✓ A compelling story for why employee financial wellness is important.
What are the potential benefits for your workforce? What are the potential benefits for your organization?

✓ A clear understanding of your workforce’s needs.
Consider conducting a confidential needs assessment of your workers to learn which challenges are most common to them.

✓ A clear understanding of your work environment.
Be sure to consider how easily your employees can access services, taking into account their typical work schedules, technological capabilities, and any threats to the confidentiality of information.

✓ A champion within your organization.
Enlist ambassadors to the program from frontline employees or financial program vendors to actively and consistently promote services.

✓ A reliable and consistent feedback loop.
Pinpoint problems early and solicit regular feedback to ensure that services are aligned with the needs of your workforce.

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