



# Community engagement

Creating brighter financial futures and maximizing your investment in nudge



## When it comes to understanding the world of money, everyone is different.

In fact, a recent Harvard Business School study shows social learning within communities, alongside technology increased course success rates by 85%. That's why our community engagement offering is shaped to enhance the impact of nudge by supporting people outside of our technology alone.

There are two ways that we offer community engagement to maximize your investment in nudge:



### Financial wellbeing champion training

For people to learn live from experts and help others.



### On-demand money masterclasses

For people to learn from experts direct on nudge.





# Financial wellbeing champion training

In these live, interactive training sessions, our experts share knowledge from the nudge platform to empower groups to improve their financial wellbeing and signpost others to nudge to take action on theirs.

Centered on the nudge platform - they will gain insights into the impact of money on their community, enhance their skills in key financial topics, and receive the tools necessary to support others.

Most importantly, these sessions are about empowering individuals to understand what financial wellbeing is and how nudge can help them, their peers and communities to improve it. Champions are not expected to advise others on their finances, rather generate awareness of the benefits of nudge and signpost others to improve their financial health.



## Benefits of being a champion:

- ✔ Become an expert in how nudge supports financial wellbeing
- ✔ Improve own financial wellbeing
- ✔ Network and build credibility as a financial wellbeing champion
- ✔ Help others and grow own confidence



## Session contents

Each 60-minute interactive training session, delivered by our experts includes:



### Money and your community

The latest research on the financial health of the community in the session and social impacts on the community (See communities page 6).



### Intro to nudge

A run through of nudge's key features, education and how to make the most of the benefit.



### Topics and signposting for your community

Financial wellbeing champions will be equipped with a deep knowledge of the nudge platform, so they can direct people to the areas they need help with. These areas might include investing, retirement planning, budgeting for day to day, debt management, or saving for the future - all through the lens of the challenges that community may be facing. For example, budgeting for early careers groups or government support for carers.



### Signposting to your relevant benefits

Depending on which community we are engaging, we will work with you to create a segment that signposts to other relevant benefits you offer to further help with financial health. For example, family related benefits for your women's or men's networks.



## Follow up materials

After training, champions will receive their own toolkit of resources, which will outline what they have as support material, what will be expected of them as a champion and communication assets.

Additionally, they will receive communication templates and channel options to make it easy to communicate that they are a champion and a go-to person on financial wellbeing.

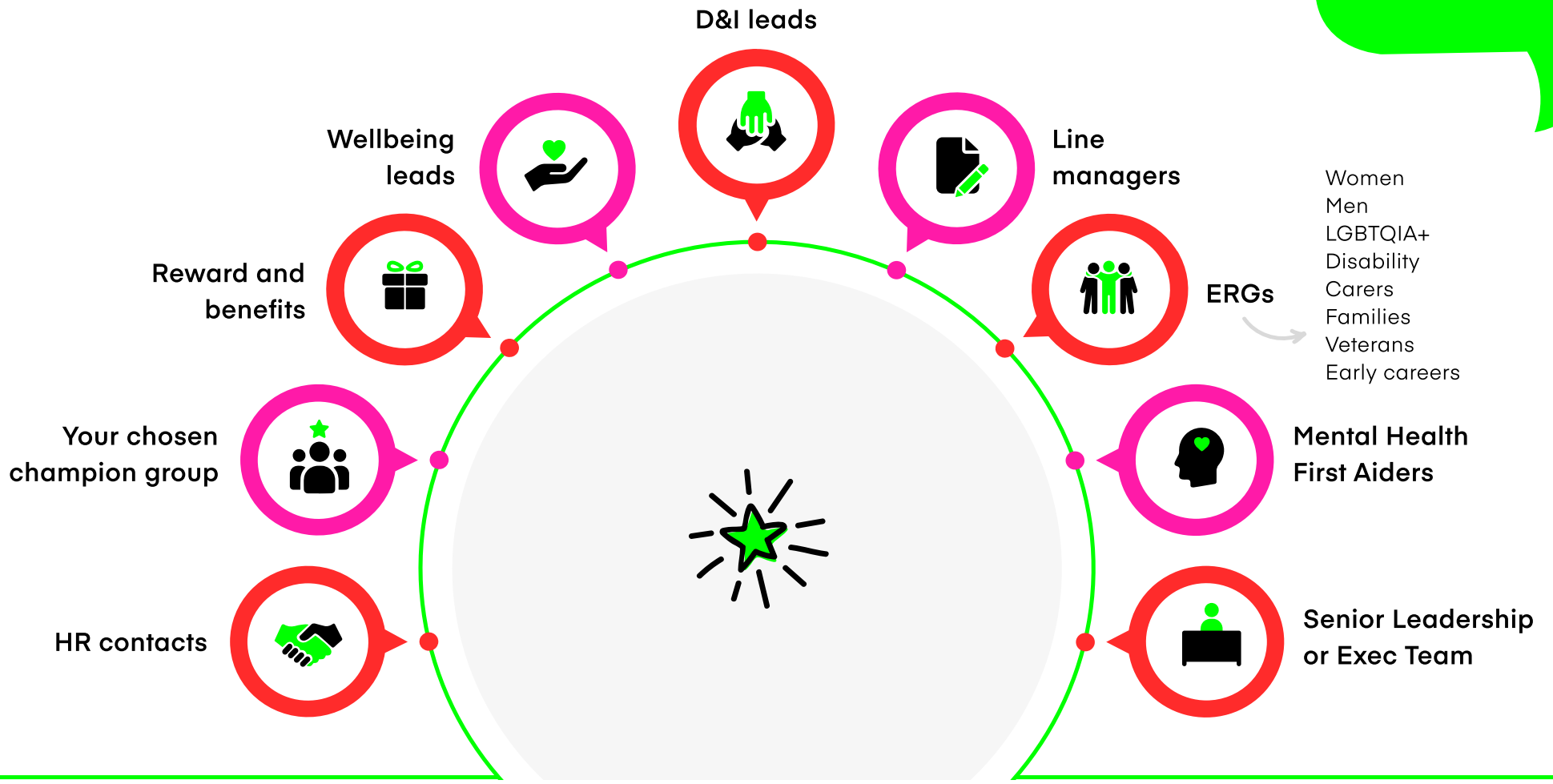


### Champion toolkit includes:

- ✔ Factsheet summarizing session and signposting to relevant benefits.
- ✔ Feature videos to explain nudge to others.
- ✔ Communication templates to promote nudge (this is hosted separately to client hub).
- ✔ Digital badges for champions to have at work and on LinkedIn.



# Champion training group options





# Champion training

You can work with your Customer Success Manager to choose which training sessions you require and the communication support you need to promote them. Below are two of our standard packages, you can tailor the amount of sessions you require, discounts are available based on quantity.

The content for each session is created by our experts to keep sessions relevant and best practice – we can add your company logo and relevant benefits – all other content is non-customizable to best upskill people on financial wellbeing.

We recommend you choose groups of maximum 40 people to encourage interactivity.

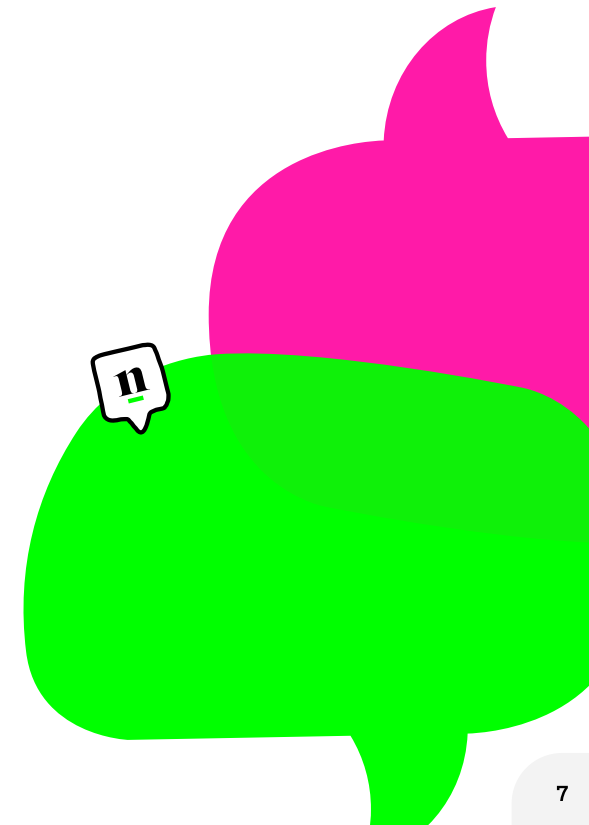


## Benefits of more sessions:

- More people empowered to use nudge to improve their financial health.
- More communities empowered to learn together, with people like them.
- Session content bespoke and relevant to that community.
- Creating safe spaces to learn.
- Resulting in higher engagement in nudge and bigger impact on financial wellbeing.

## Pricing package options

Innovator	Trailblazer
<ul style="list-style-type: none"><li>✔ 2 group training sessions.</li><li>✔ Toolkits to promote sessions on your channels.</li><li>✔ Follow up champion toolkit.</li><li>✔ Impact survey and report.</li><li>✔ Access for your champion community to the latest news and materials.</li></ul>	<ul style="list-style-type: none"><li>✔ 4 group training sessions.</li><li>✔ Bespoke toolkits to promote your sessions.</li><li>✔ Follow up champion toolkit.</li><li>✔ Impact survey and report.</li><li>✔ Access for your champion community to latest news and materials.</li></ul>

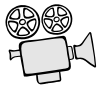




# On-demand money masterclasses

In these on-demand 20-minute masterclasses, our experts provide people with an introduction to key financial topics and guide them on the next steps for accessing further education on nudge.

These masterclasses are easily accessible on the nudge platform, allowing your team to kick-start their financial wellbeing journey and will be updated with new content at least every year so they are always relevant.



## Package includes:

- ✔ Five on-demand 20-minute masterclasses that upskill people on money topics and increase engagement with nudge.
- ✔ Masterclasses pinned to top of live feed, rotated every 3 months.
- ✔ Promotion via a nudge at the start of the year.
- ✔ Toolkits to promote sessions on your channels.
- ✔ Data and tracking of impact.





## Driving awareness of the masterclasses

You will be provided with a toolkit to communicate the on-demand masterclasses, including: email templates, banners, and internal communication channel template posts which you will find on the nudge client hub.

## On-demand masterclass contents

There are five types of on-demand masterclasses (see overleaf). Each 20-minute session will include:



An overview of nudge.



Intro to the topic and importance.



Reflection pauses for viewers to assess their current state and goals.



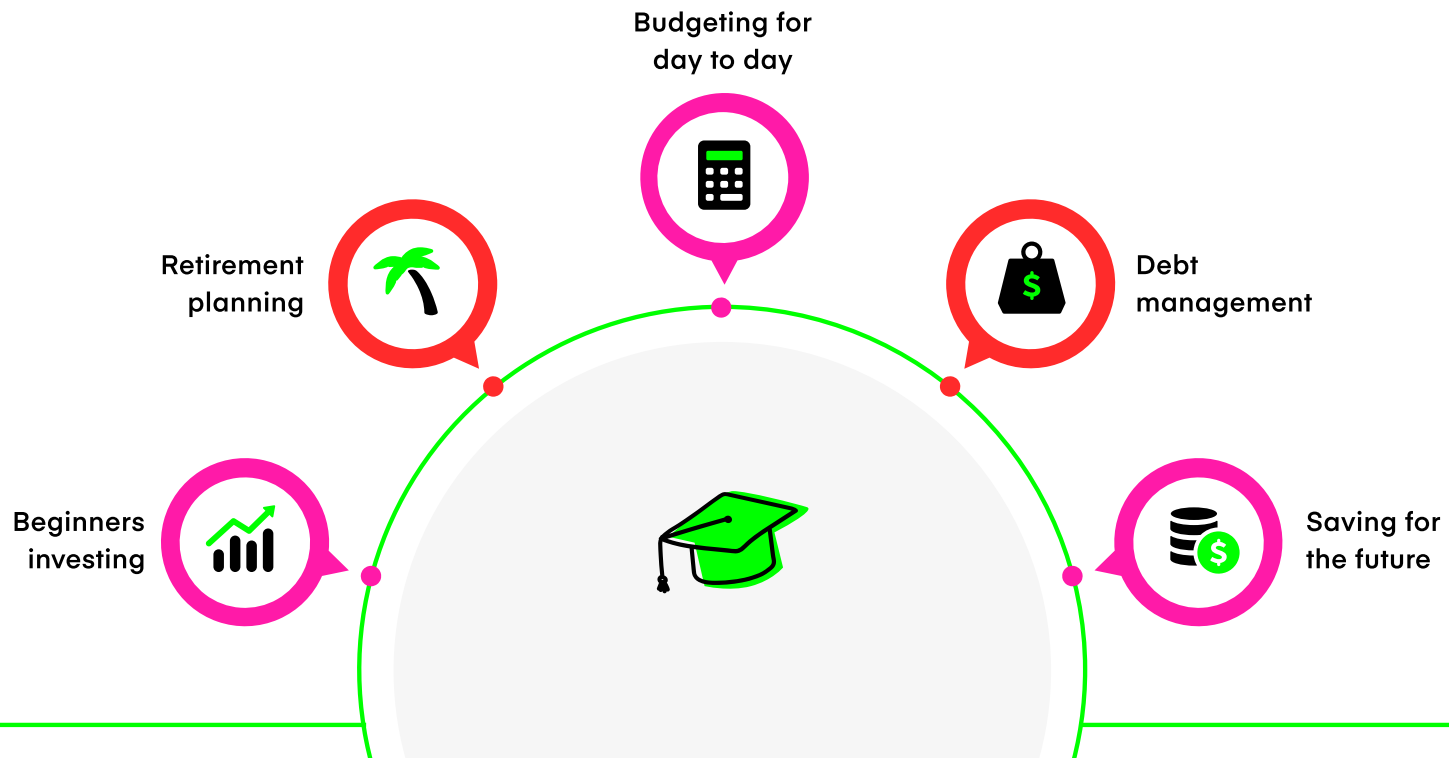
A walk through of relevant posts and tools to upskill on each area.



Clear next steps to move forward on their journey.



# On-demand masterclass topics



5 on-demand masterclasses for one year

# nudge

Impartial, global financial  
education for all

For employees, customers, members and,  
well, anyone - anywhere

nudge is an impartial, global financial education for all. Drawing on behavioral psychology and data, our platform offers personalized, engaging financial knowledge and skills to educate and delight anyone. A global solution that is unaffiliated with conflicting financial products, our inclusive approach is trusted by hundreds of thousands of people across the world.

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