



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 your people outside of our technology alone.

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



Introduction to nudge

For your people to learn about nudge and how to make the most of it.



Financial wellbeing champion training

For key stakeholders to upskill on financial wellbeing and help others.



Community masterclasses

For your employee resource groups (ERGs) to improve their financial wellbeing.



On-demand money masterclasses

For your people to learn from experts direct on nudge.





Introduction to nudge

As part of your financial wellbeing program launch, this 30-minute, live session will introduce nudge to help your people get started on their financial wellbeing journey.



For employees

This session showcases all the features of the nudge platform so that your people can start improving their financial wellbeing – highlighting how they can use nudge to build knowledge and skills, take action and feel in control.

Centered on the nudge platform - employees will gain insights into the importance of financial wellbeing and receive the tools necessary to take action.

Agenda

- ✔ What is financial wellbeing
- ✔ Full nudge platform demo
- ✔ How to get the most out of nudge
- ✔ Live Q&A



For local HR, reward teams and line managers

Designed for key stakeholders so they can drive engagement with your program. This session will upskill people on nudge and financial wellbeing, showcasing key areas for signposting those in need of support and personal finance knowledge.

We also share best practice on how to promote nudge and financial wellbeing within the workplace to support your wider wellbeing initiatives.

Agenda

- ✔ The role of financial wellbeing in the workplace
- ✔ Full nudge platform demo
- ✔ Toolkits and resources available to promote nudge
- ✔ Live Q&A



Financial wellbeing champion training

In these live, interactive training sessions, our experts upskill key stakeholder groups of your global financial wellbeing program with a greater understanding of nudge and financial wellbeing as you implement, rollout and continue promotion of your program.

Individuals will get a better understanding of the principles of financial wellbeing, what it means in the workplace and how their role can impact program success. Within the context of the nudge platform, they will build their knowledge and skills to improve their own financial health and how to be a voice to demonstrate its importance to the wider business.

Most importantly, your people will not be 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 a champion network:

- ✔ Develops a network of stakeholders actively promoting financial wellbeing
- ✔ Extends the reach and impact of your financial wellbeing program
- ✔ Positions champions to lead long-term financial wellbeing efforts
- ✔ Provides additional avenues for insights and feedback



Session contents

Each 60-minute interactive training session, delivered by our experts, is tailored towards a key stakeholder group (see page 6) and includes:



Your global financial wellbeing program

The latest research on financial wellbeing in the workplace and an understanding of the drivers behind your wellbeing program.



Intro to nudge

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



Topics and signposting to help your people

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 different people and communities may be facing.

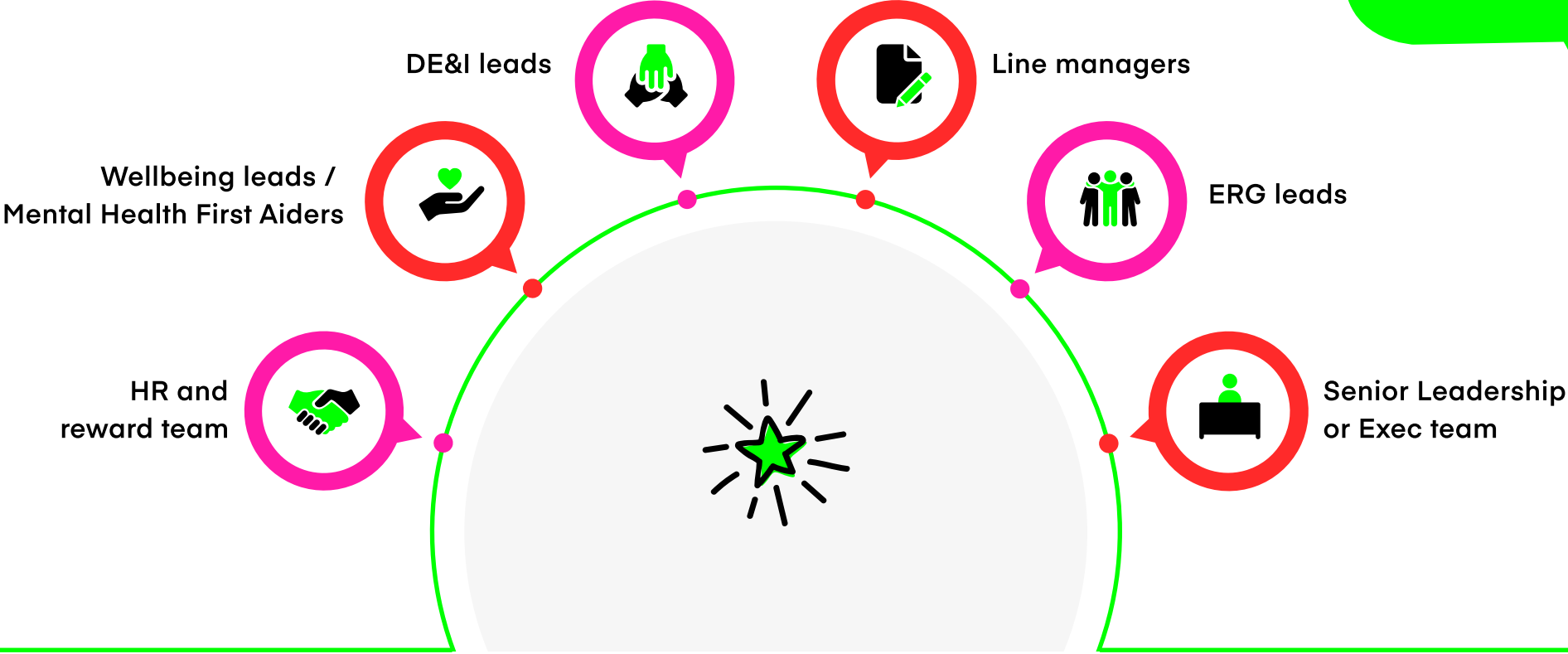


Signposting to your relevant benefits

We will work with you to create a segment that signposts to your company's other relevant benefits to further help with financial health. For example, family related benefits for your women's or men's networks.



Champion training group options



[VIEW GROUP TRAINING AGENDAS](#)

Post training materials and support

Following the session, our community engagement specialists will be available as ongoing support for champions, so they can go on to build better awareness and understanding of financial wellbeing, and how nudge can help. This includes:



Financial wellbeing champion toolkit

Champions will have immediate access to their own toolkit, which will outline what they have as support material, what will be expected of them as a champion and communication assets to make it easy to promote that they are a champion and a go-to person for their colleagues on financial wellbeing.



Newsletters

Every 3 months, the community engagement team will send out personal newsletters to keep champions aware of the latest education, tools and resources available to them. This will encourage a 1:1 dialogue to find out how they are getting on and the opportunity to get additional support and resources if required.



Champion community sessions

All champions will be invited to attend an open meeting each quarter. These sessions will update champions on the latest nudge education, feature updates and research. It will also enable people to connect, share best practice and problem solve with champions from other organizations worldwide who have a shared interest in financial wellbeing.



Champion toolkit includes:

- ✔ Factsheet summarizing session and signposting to your 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.





Community masterclasses

When it comes to the world of money, we understand that everyone has different interests and needs. But there are common challenges that connect us.

Our selection of 45-60 minute, live masterclasses are designed to support your employee resource groups (e.g. Women, LGBTQIA+, Carers), as well as broader employee groups, who have a specific interest in mind.



These topics perfectly align with key moments in our global financial wellbeing calendar.

GLOBAL FINANCIAL WELLBEING CALENDAR



Masterclasses available:

- ✓ Breaking financial barriers: Disability and money
- ✓ Carer's financial compass: Navigating carers' finances
- ✓ Early careers: making your money move
- ✓ Family funds: smarter money for every home
- ✓ From Service to success: A veteran's financial roadmap
- ✓ Pride in finances: thrive with your money
- ✓ Wealth and wisdom: Women and finance
- ✓ Wealth and wisdom: Men and finance
- ✓ Building financial resilience: managing change
- ✓ Mind over money: finding financial peace
- ✓ Small change, big impact: everyday money

VIEW MASTERCLASS AGENDAS

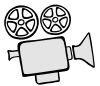




On-demand money masterclasses

In these on-demand 20-minute masterclasses, our experts provide your employees 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 education at least every year so they are always relevant.



Package includes:

- ✓ Five on-demand 20-minute masterclasses that upskill your people on money topics and increase engagement with nudge.
- ✓ Pinned post at top of live feed, linking to full suite of on-demand masterclasses.
- ✓ 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 internally including: email templates, banners, videos 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.



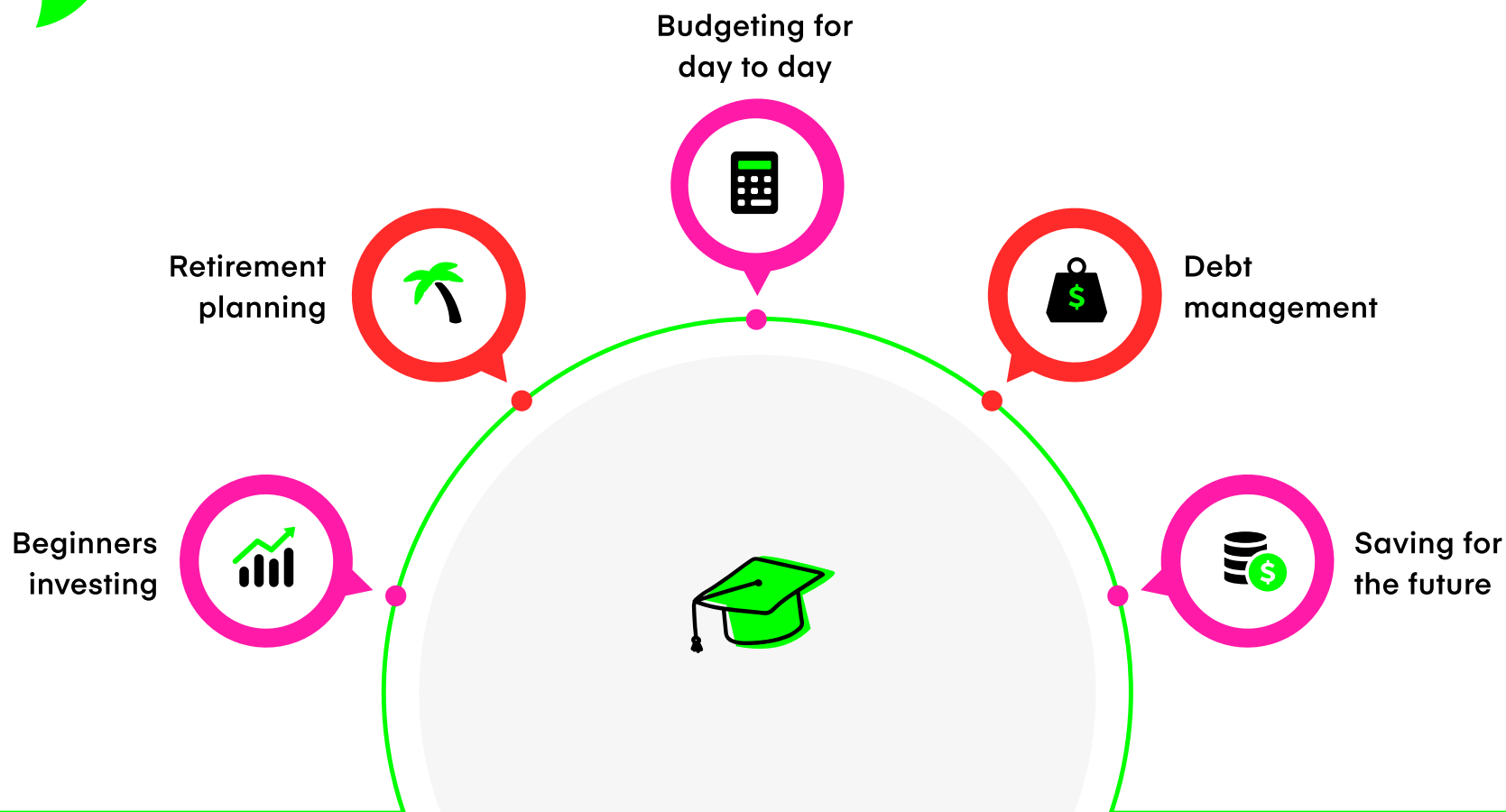
A walk through of relevant posts and tools to upskill on each area.



Clear next steps to move forward on their journey.



On-demand masterclass topics



ACCESS ON-DEMAND MASTERCLASS OVERVIEWS

Masterclasses are available in the following countries, by language variant:

-  English, Canada
-  English, India
-  English, Ireland
-  English, UK and Global
-  English, US
-  French, Canada
-  French, France and Global
-  German, Germany
-  Hindi, India
-  Italian, Italy
-  Japanese, Japan
-  Mandarin, China
-  Portuguese, Brazil
-  Portuguese, Portugal
-  Spanish, Spain and Global



Optimal engagement plan

Money confidence, control, and a positive, proactive money mindset doesn't happen overnight.

We have found that organizations who combine the four elements of our community engagement offering see much higher engagement with their financial wellbeing program as they drive awareness, understanding and uptake of nudge over time.

As we work with organizations of all shapes and sizes, we recommend the below annual global community engagement plan for maximum impact:

Type	When	Quantity	More information
Intro to nudge	Within 1-4 weeks of launch and reminder sessions yearly	x6	Two sessions per region (AMER/EMEA/APAC)
Champion training	Within 3 months of launch	x6	Training for you local stakeholder groups
Community masterclasses	Starting 3 months after launch	x9	Three sessions per region
5x On-demand money masterclasses	Ongoing	x1*	*For one country. You can add additional countries to cover your global population

You can align these sessions with campaigns in the [Global financial wellbeing calendar](#).

Please speak to you nudge contact for bespoke pricing packages, based on your needs.

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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