



**Financial Fitness
Group**

PROGRAM PROMOTION GUIDE

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Build Your Program Promotion Plan

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GET STARTED

Congratulations on bringing the proven benefits of ELEVATE Wisconsin to the employees in your organization!.

To make it simple and easy to administer this program, we've developed this guide based on best practices from previous programs. It will help you:

- Prepare for the program
- Assemble your program promotion team
- Build your program promotion plan
- Leverage the program tools and resources
- Enjoy great program results!

NEED HELP WITH ANY OF THESE ITEMS?

Read on to learn more.

Let's get started! The most important thing you can do is develop an effective program promotion plan that you can implement throughout the program to maximize engagement and overall success.

What can you expect next? To get your program off the ground, we will help you answer these questions :

- What are the goals of your program promotion plan?
- Have you built your program promotion team?
- Have you decided who will participate and how, where, and when they will participate?
- Have you explained how the program works and the benefits to your employees?
- Have you created a reward/recognition plan to incentivize your participants?

SET THE GOALS OF YOUR PROGRAM PROMOTION PLAN

Your organization's size, culture, resources and internal schedules will greatly influence the program promotion plan you build. Regular, consistent communication will ensure that you and your participants enjoy a successful and productive learning experience.

Ask Yourself, What are the goals of your Program Promotion Plan?

- Maximize the number of people who participate (and complete the program)
- Create a sense of excitement, enthusiasm, and urgency in the program
- Make sure your participants understand how engaging with the program will result in individual and organizational achievements, rewards, recognition, etc. (if applicable)

BUILD YOUR PROGRAM PROMOTION TEAM

Having management and other influential partners support you in offering this program to employees is the first step in ensuring success. You will find it helpful to have them support you throughout the program. This will let participants know that your organization is truly behind the investment in their personal financial wellness.

Your team (both company and benefits partners) can support the program by:

- Helping to promote the program and keep people involved
- Helping to contribute prizes or other incentives
- Helping to cover the cost of the program

Who should be on the Program Promotion Team?

Ask yourself, "Who might benefit from or support the program?" Based on our work with other organizations, here are some of the titles of people who typically support the program:

Internal contacts

- Human resources, benefits, or wellness program managers
- Administrators of employee assistance programs (EAPs)
- CEOs, senior vice presidents or other department heads or executives
- Culture committee members

External contacts

- Your benefits advisor
- Your retirement plan, EAP or wellness program provider
- Your health insurance provider
- Your company's preferred financial institution

RESOURCES AVAILABLE TO HELP YOU

We have compiled a library of valuable tip sheets with proven tools and ideas to help you lead a successful **Financial Fitness Program** at your organization.

Additionally, if you would like to discuss your promotion plan with our program management team, you may email us

at support@financialfitnessgroup.com
or call 888-345-1285

TIP: The first step is to build the list of those who can support you.

BUILD YOUR PROGRAM PROMOTION PLAN

To maximize the impact of the program, you should promote it to your employees.

WHY PROMOTE ELEVATE WISCONSIN?

Promoting this opportunity to positively impact the maximum number of employees will result in the most significant bottom-line benefits for your organization. In short, promoting ELEVATE Wisconsin will get you the most **“bang for your buck”** for helping educate your employees on financial literacy.

WHO SHOULD PARTICIPATE IN FINANCIAL EDUCATION?

We recommend that you promote ELEVATE Wisconsin to EVERYONE—all employees from administrative staff to production workers, executives and middle management. Make it a benefit of being an employee. No matter how financially literate your employees are, the program adds value!

Check out the tips below to learn more about maximizing the value of this program by encouraging all of your employees to participate in the **program!**

- Many organizations find that they underestimate how many of their employees want to participate in this program. Please notify us if you would like to increase the number of employees that you would like to allow to participate.
- If your organization selects to include employee family members—we have found that inviting family members to participate in the program has increased family participation and boosts positive results.

TIP: You can offer the program to all your employees, to give them a clearer picture of their own financial well-being.

HOW TO ENGAGE PARTICIPANTS

There are two ways for your employees to engage with the program. You can:

- Send out your own companywide emails via the email examples we provide on the Administrators Resource Page. You can send these out on a weekly basis to all your employees to encourage them to log in and participate.
- Use posters, flyers, other printed materials, social media, and your Intranet site to direct employees to participate using a personal email address. You can also include these materials in the emails!

We encourage you to use the posters and other tools we provide you to generate excitement, motivate your participants to keep going, and recognize their achievements.

WHERE AND WHEN CAN PEOPLE PARTICIPATE?

This program is accessible online using any device that is connected to the Internet. Employees who do not have a work email or computer on the job can still get involved. They may use a desktop computer at home, a smartphone or tablet, or family members' or friends' devices to access the program. Their local library may also offer Internet access.

You have the option to choose if your company will offer an event-based program or run it year-round. The program is available 24 hours a day, 7 days a week. Some employers choose to allow employees to complete the program on work time. Others request that they do it after-hours. Find the right fit for you.

TIP: Allow employees to access the program at work (even if it's only during "down time") and make participation (but strongly encouraged). Many companies provide computer stations in central areas or training rooms. Use the posters to highlight these areas and promote the program.

ENERGIZE YOUR PARTICIPANTS

Top 10 Items to Communicate to Participants

Before and during the program, there are important items that you need to communicate to employees to maximize participation. The program's provided email examples share some of this information. These emails can start being sent on the day the program starts. Prior to the program start date, we strongly encourage you to use your organization's pre-existing messaging strategies such as newsletters, your Intranet site, inter-office memos, and paycheck stuffers.

Here are the top 9 things you need to communicate:

- 1. All personally identifiable information provided is kept strictly confidential; neither your organization nor ours will have access to it. Also, no one but the participants will have access to their responses and scores.
- 2. Whether employee participation in the program is mandatory or voluntary. This is totally up to you. Both ways produce excellent results.
- 3. Employees can customize their learning experience with educational materials to help them increase their financial knowledge and improve their unique financial situation.
- 4. Employees may add as many tutorials as they complete them in any order and at whatever pace is most convenient for them.
- 5. The program may be accessed anywhere, anytime, as long as there is an Internet connection. Participants may use home computers, work computers, Macs, PCs, tablets, smartphones, etc.
- 6. Participants may view and save certificates of completion as they pass courses, as well as earn points.
- 7. Each tutorial starts with a pre-test and ends with a post-test. There is no minimum passing score for tutorial pre-tests. The passing score for each tutorial post-test is 75%. Tutorial post-tests may be re-taken as many times as necessary.
- 8. The Financial Fitness quizzes take 8-10 minutes to complete. Each tutorial takes 15-30 minutes to complete.
- 9. Participants can be sent regular reminder emails from your organization.

MANDATORY OR VOLUNTARY?

One important thing to decide is whether to make participation in the program mandatory or voluntary. There are pros and cons to each approach. If you make it mandatory, all your employees get to participate together; they build a sense of camaraderie during the program. However, for some companies, requiring employees to participate in this type of program does not fit into their corporate culture.

If you make participation in the program voluntary, participants are more likely to enjoy the program, since it was their choice to participate. However, you may find yourself doing more follow-up with employees to maximize participation because more employees may procrastinate their engagement.

Ultimately, the choice is yours. Pick whichever option will work best to help you achieve your goals. If you have questions about the options above, contact us.

RECOGNIZE AND ENCOURAGE YOUR PARTICIPANTS

Personal recognition, encouragement, and coaching are powerful

One of the simplest, most effective ways to build excitement for the program is to take the time to congratulate participants when they complete a course. Likewise, encourage participants who are falling behind or having trouble. The simple fact that they know you are there to encourage and support them is invaluable.

The Benefits: What's in it for Me?

Be sure to tune your participants in to **"What's in it for me?"**. Help your participants understand that they are part of a select group of less than 1% of all employees in the United States who have the opportunity to learn how to take control of their personal finances with this program. This program will not only help them learn to make smarter financial decisions, but it will also help them gain confidence about their finances, perform better at work, AND take steps to protect their families from financial ruin.

Plus, their active involvement will help your organization earn recognition as a leader in identifying financial wellness in the workplace as an effective tool for increasing overall employee wellness and productivity.

REWARD YOUR PARTICIPANTS

Whether you choose a creative theme, an internal competition, a free lunch, a pizza party, paid time off from work, a \$25 gift card, or some other great idea to reward your participants for completing courses, be clear, consistent, and persistent in communicating the benefits of and the added incentives for participating in the program. An easy way to do this is to add your messages in the header and footer of the weekly emails or social

Get creative. Make this program fun for your participants!

While offering big cash prizes to encourage employees to participate in the program is a nice touch, your program promotion plan does not need to be expensive to be effective. Be creative, make it fun, and communicate whatever rewards and recognition you choose with passion and enthusiasm.

A creative theme like Survivor, The Biggest Loser, or The Amazing Race can go a long way to build excitement for the program. Your enthusiasm will be contagious and soon others will share your excitement!

TOOLS AND IDEAS YOU CAN USE TO BUILD YOUR PROGRAM PROMOTION PLAN

Send personal or group emails, letters, or memos to announce, promote, and remind participants about the program.

Before ELEVATE Wisconsin starts, use the posters and other items provided for you to promote the program by hanging them up or sending them out digitally.

After your program has started, use these posters and other items to reinforce awareness and excitement about the program.

Invite your CEO or another respected leader in your organization to send a letter encouraging all employees to participate. Post updates on your company internal website (Intranet).

Make regular announcements about the program over the office public announcement system.

MAXIMIZE THE PROGRAM'S VALUE WITH SCORE

Your participation in the Financial Fitness Program includes the opportunity for all of your employees to take part in the Financial Fitness Checkup. So, whether you have 100 employees or 100,000, the Checkup gives you a way to provide a highly valuable tool to all of your employees.

Why is the checkup valuable to employees?

Research shows that nearly nine out of 10 employees are concerned about their financial future and don't feel they know enough to make sound financial decisions. The Checkup is a fast and easy way for employees to get a valuable financial wellness assessment. In just 10 minutes, the highly interactive Checkup provides employees a personalized assessment of their current financial knowledge and behaviors. It will also give them a customizable learning recommendation that fits their unique needs and interests.

Why is the checkup valuable to you, the employer?

The Checkup provides you with:

- A fun, easy, convenient, and scalable way to get your employees thinking about their financial wellness in just 10 minutes.
- A great way to increase employee participation in the program and thereby maximize your ROI.
- A detailed understanding of the financial well-being of your employees. Whether you use this information to help improve your overall employee benefit communications or to assist your management team in knowing where to focus your financial wellness efforts, the Checkup provides you a valuable tool for collecting meaningful data.
- Insights on how your employees' financial wellness compares to that of the population as a whole.
- An aggregated report on the financial well-being of all the participating employees.
- The ability to assess employee interest in financial wellness programs.

Privacy Policy

We value your privacy and the privacy of your employees.

Financial Fitness Group is an enterprise software company that provides financial education solutions designed to maximize user engagement. Our financial wellness platform is proven to engage users of all backgrounds, from investors to employees. Financial Fitness Group is a leading provider of interactive financial wellness for financial service providers, banks, credit unions, advisors, government agencies and some of the largest companies across the nation.



**For more information about
the Financial Fitness Group,**

email us at support@financialfitnessgroup.com