



Driving financial wellbeing

# The psychology driving organisations to focus on financial health

Professor Sir Cary Cooper & Jeanette Makings

Strictly confidential



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# Introducing....



**Professor Sir Cary Cooper**  
Corporate wellbeing expert  
ALLIANCE Manchester  
Business School, University of  
Manchester



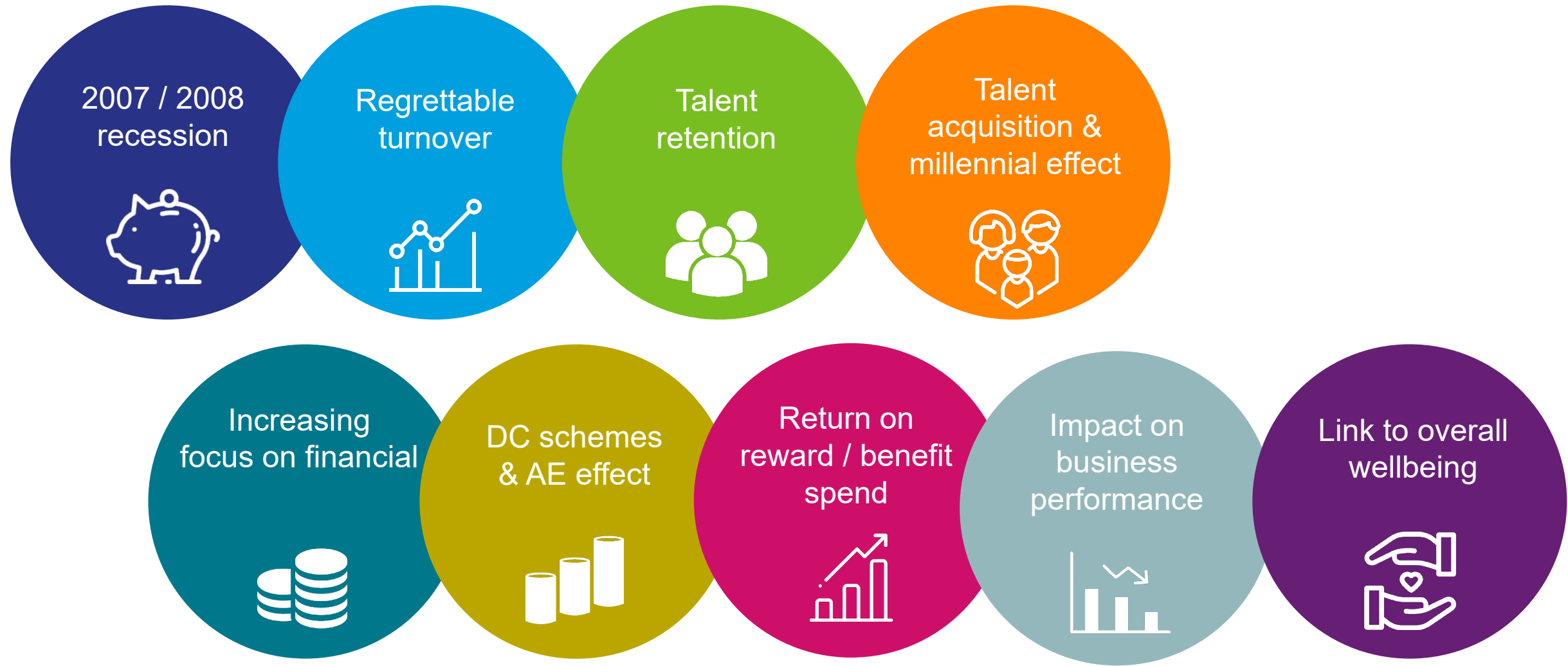
**Jeanette Makings**  
Head of Financial Wellbeing  
Close Brothers



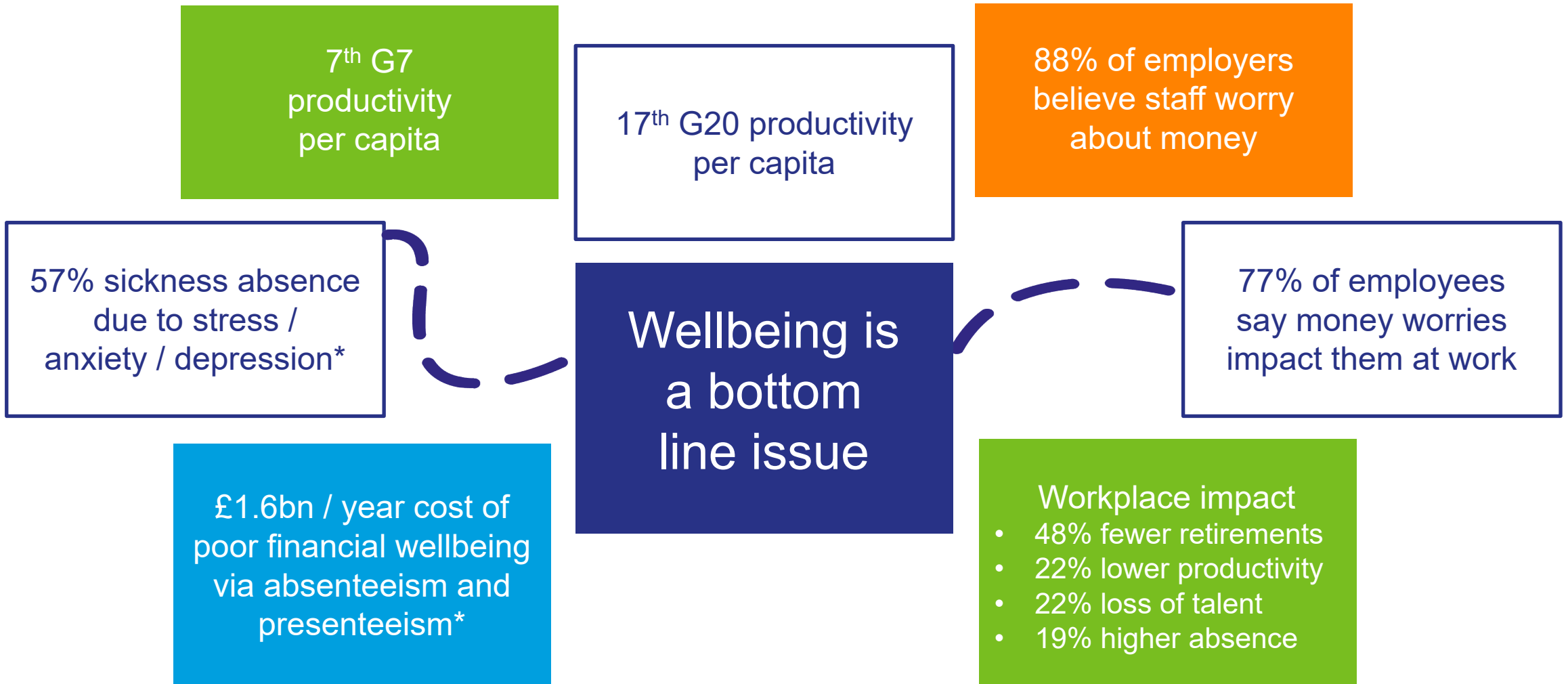
**How does your job affect  
your wellbeing?**

**A Positive  
B Negative**

# Why are organisations focusing on wellbeing?



# Wellbeing and business performance – what's the link?



# Can you measure wellbeing?

## Corporate health

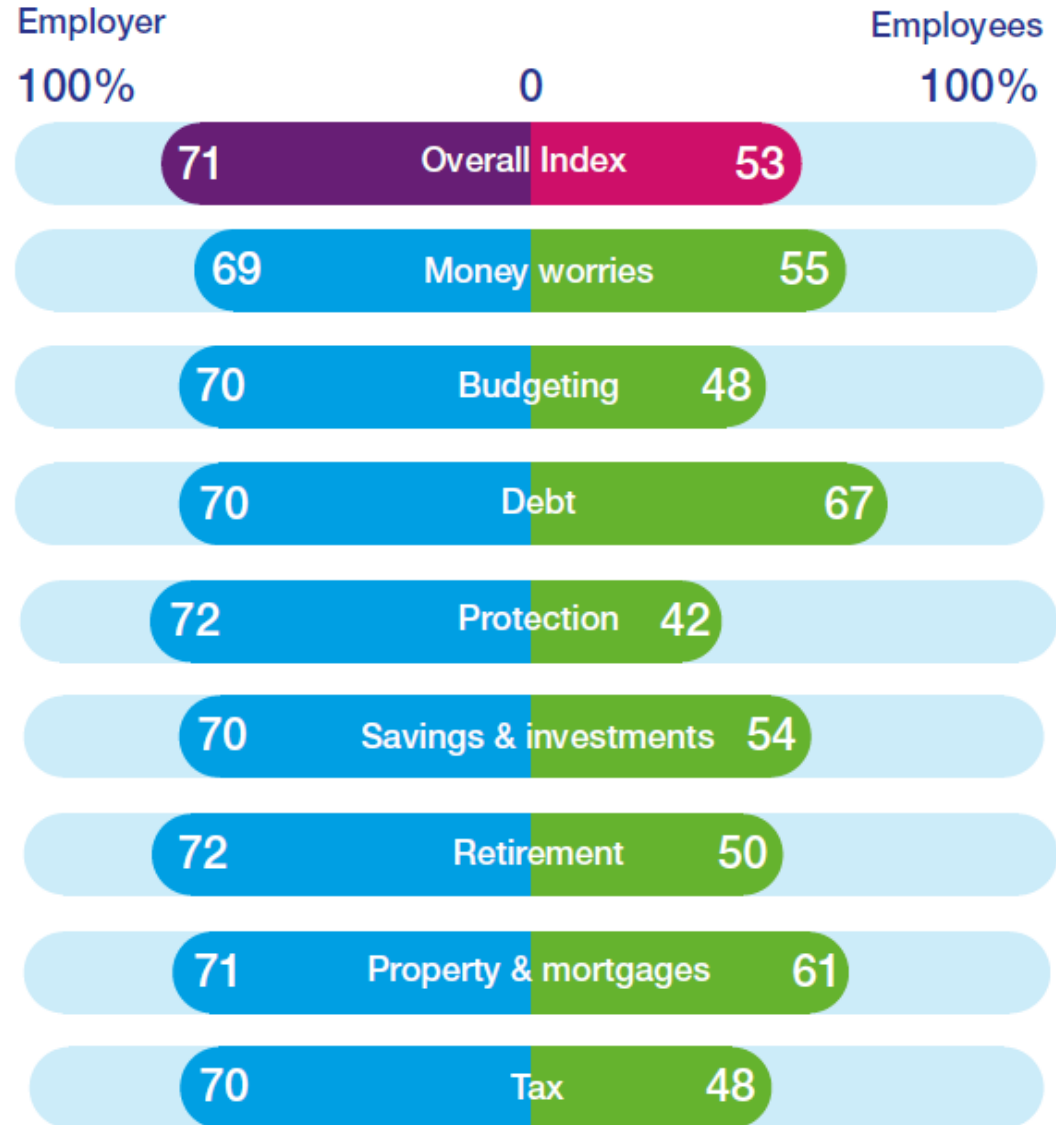
- 57% sickness absence
- Presenteeism
- Use of and trends EAP
- Productivity per capita
- Engagement

## Financial health

- Big data
- Personalised & enterprise level absolutes
- UK employees scored 54 out of 100
- Individual measures across all 7 areas of financial health
- Reality gap – employer 71 vs 54 employee



# Reality gap

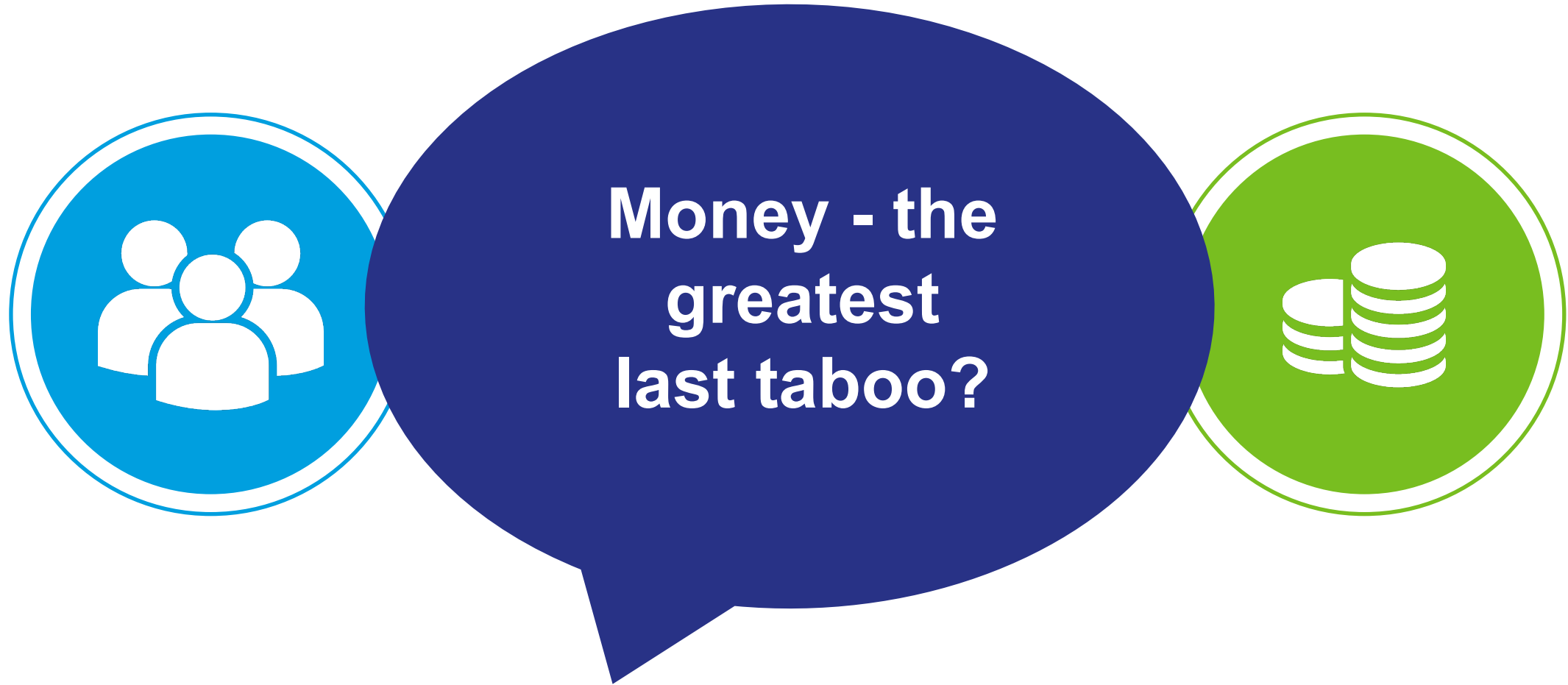






**Who wouldn't you share your personal finances with?**

- A Your family**
- B Your friends**
- C Your colleagues**
- D Your employer**
- E All/ many of the above**





**Thank you and  
questions?**



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