***Guiding Questions for Relationship Managers***

*These questions are designed for Relationship Managers to ask company leaders at partner organizations during kick off, to help the client make the most of the financial education offering.*

**List A: Questions to ask after the partner organization has committed to using the resource.**

*These questions are focused on implementation and getting the partner organization to think about how they will implement the program with their employees.*

**Q: How will you give your employees easy access to the program?**

Recommendation: Add the program link to a prominent place on your company intranet

Integrate the program into your new employee onboarding process by using the available template.

**Q: How will you communicate the availability of this free benefit to all employees?**

Recommendation: Include the program link in dedicated email communication or an employee newsletter. You can also display flyers and signage around the office to remind employees how they can access the program using our template designs.

**Q: How will you keep this resource top of mind for employees and promote usage?**

Recommendation: Leverage our seasonal calendar to share relevant topics and build a regular cadence of communication throughout the year, display web banner on company intranet, and incentivize completion with special prizes (see suggestions on pg. 2)

**Q: How will you leverage the program’s data collection to better support your employees and their specific financial priorities and needs?**

Recommendation: Work with us to schedule an onsite workshop for additional learning

Build awareness of other financial benefits available to employees (Special discounts, 401k match), encourage employees to take positive actions like building a savings plan or contributing to their 401k.

**Q: By our next check-in, how many employees would you like to see registered and active on the resource?**

Recommendation: At least 10% of your employee base.

**List B: Questions to ask at first check-in about the progress of the launch**

*These questions are focused on building accountability with the partner organization and discussing how they rolled the program out with their employees.*

**Q: How did you give your employees easy access to the program?**

**Q: How did you communicate the availability of this free benefit to all employees?**

**Q: How can you continue to keep the resource top of mind for employees in the coming months?**

**Q: Did we reach our goal for the number of employees registered and active on the resource? If not, what are some strategies the company can use to increase the number of registrants and active users for the coming months?**

**Incentive Options**

*These incentives are designed for partner organizations to roll out with their employees alongside the workplace banking program.*

**Team-Based Incentives:**

* Team “time-off” for the team with the most modules completed by the end of an incentive period (recommend ~1-3 months).
* Free financial consultation for members of the team with the most completions each month (or at the end of an incentive period).

**Individual Incentives:**

* Company “certification” for the completion of a particular playlist - to include in signature lines, business cards and/or on LinkedIn profiles.
* Benefit “points” to earn time-off for the completion of a set of modules or playlists.