

## a case study

how just-in time, supportive messaging increased engagement in financial health solutions



## the company

**established:**  
2008

**industry:**  
construction

**no. of employees:**  
600+

## the challenge

- Assessment showed only 50% of their employees believed that company cared about their financial wellbeing.
- Spanish & English speaking employees, many of whom either don't access information via company email. There was a need for communication that reached all employees in a format that everyone would read.
- Employees were not utilizing many of benefits that company offered. They want employees to recognize that they are providing benefits to help increase their overall wellbeing.



**Maria Diaz,**  
HR Director

We want to include benefits that are in line with our culture. It's important that our employees know that we care about them.



Money challenges play a big part in their mental health. I loved the nuggets & nudges providing important resources.



## auto enroll - the secret sauce

it's not just for your 401k plan anymore

90%

auto-enrolled employees still receiving texts after 12 months

68%

engaging with key benefits & resources

## what employee tell us...



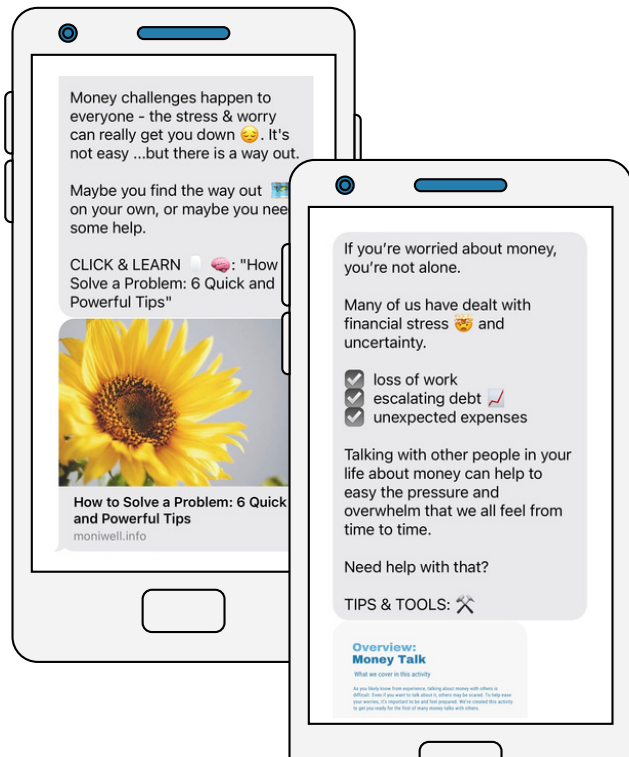
*It's been a extremely valuable experience.*



*It's positively impacted how I think & feel about money.*



*I would recommend it to someone else.*



## our solution

Science-backed, technology driven, psychology first nudges

Auto-enrolled employees receive just-in-time text messaging.

Supportive resources and tools to build their confidence, connection, and control around money.

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