# **Exploring What Works with BECU A FinHealth Success Story**

Discussion of Key Success Factors and Challenges for Implementing a Financial Health Strategy



## A discussion with BECU: real-life success factors and challenges for implementing a Financial Health strategy



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## Financial Health is a Business Strategy

It requires commitment and aligned execution across the enterprise

#### People

Supporting employee financial health

- > For FTEs, PTEs, contractors
- > HR policies (e.g., recruitment, compensation, benefits)
- > Vendor policies

#### **Performance**

Management and Measurement

- > Philanthropy, ESG, and CSR
- Corporate programs and partnerships

#### **Programs**

Strengthening community financial health

#### **Products**

Delivering customer financial health

- > Product & services design & delivery
- > Research
- > Sales
- > Technology and tools
- > User experience

Branding/marketing

 Telling your
 financial health story

 and being an
 industry advocate

#### **Promotion**

Leading with financial health



## Q&A

### **Thank You!**





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