

A DIFFERENT KIND OF INVESTMENT

The simple approach
to retaining happy,
healthy employees.



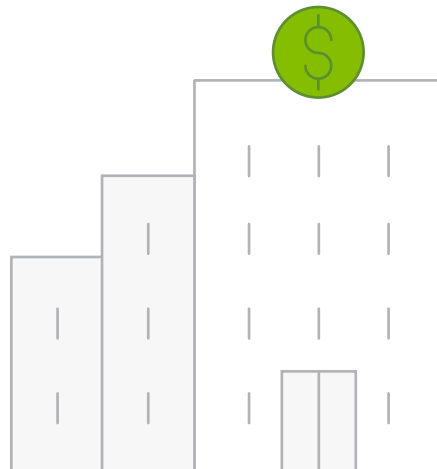
Baird, a large financial services firm, proves that even fast-paced environments can develop a Culture of Health which results in happy and healthy associates. In this spotlight, we'll share how Baird developed a robust, holistic well-being program that sees increased engagement and retention year over year.

About Baird

A large financial partner serving individuals, corporations and institutions.

Mission: To provide the best financial advice and service to our clients and be the best place to work for our associates.

One of the Fortune 100 Best Companies to Work For® since 2004 for 19 consecutive years.



4,700⁺
associates

200⁺
offices in the United States,
Europe and Asia

Health is a shared value at **Baird**.

Working in fast-paced industries—including the financial sector—can stereotypically impact a person’s health. Negative effects like fatigue, stress, burnout, mental health issues, and more can crop up fast, leading to declines in overall health and well-being. Baird leaders have always believed that their associates come first and they took an active approach to listen to their needs and ensure that they were happy, healthy and motivated—both at work and at home.

That’s why, for the last 18 years, Baird has had a well-being program in place. However, when leadership realized that their participation metrics weren’t as strong as they hoped for in the early years of the initiative—only 45% of associates were participating in the program—they wondered, what would a “Best Company to Work For” do differently to help associates and their family members improve their well-being? This question became the catalyst they needed to redesign the program to make room for more robust, comprehensive well-being support.



The goals behind **Baird's program redesign.**

Baird leaders looked at their metrics and decided they could do better. They started by developing a comprehensive well-being program that touched every aspect of the organization. They partnered with HealthNEXT, the leader in helping companies achieve a benchmark Culture of Health. The Culture of Health Program is a proven 2-part methodology consisting of a comprehensive benchmarking assessment to examine well-being efforts and a guided strategic roadmap for bending the healthcare cost curve and achieving a healthier, more productive workforce.

Their Employer Health Opportunity Assessment helped Baird focus on the 10 points within their B\Well program to lean into. And they launched an updated version that helped to create an overall Culture of Health where they could improve on:

- Leadership and support
- Strategic planning for well-being
- Creating a health-supportive environment
- Onsite and virtual well-being activities
- Health and wellness across the health continuum
- Data-driven approaches
- Marketing communications
- Incentive and benefits design
- Engagement and navigation
- Vendor management

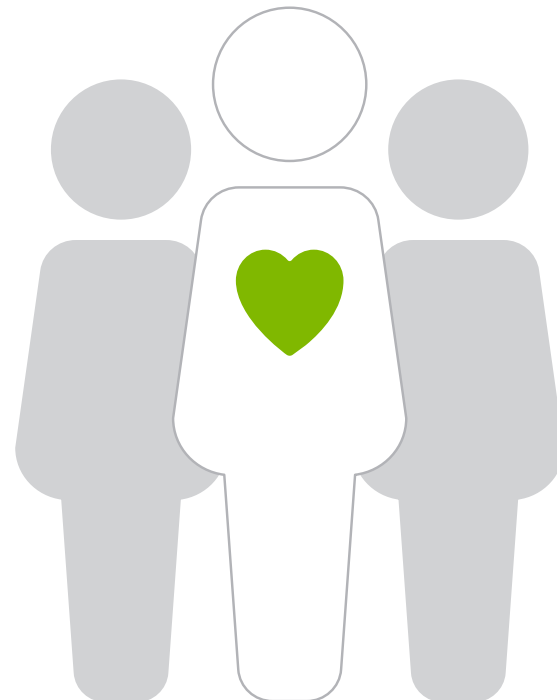


Getting leadership **support.**

Leadership saw early on that investing in the well-being of Baird associates must be a priority. After all, in order to have healthy business outcomes, they needed to have healthy associates. With leadership buy-in, Baird was able to accomplish:

- Creating a Healthcare Subcommittee to review the well-being strategy.
- Reporting BWell participation metrics in business unit meetings and town halls.
- Inviting the Total Rewards team to department leadership calls.
- Updating company values to include well-being.
- Developing inclusive well-being messaging for associates and their families.

As well-being moved to the forefront of leadership discussions, they became more excited about prioritizing their associates' health and encouraging people across the firm to focus on their well-being. This led to the next part of the strategy: getting associates on board.



Getting associate **buy-in.**

Baird leaders realized that one of the most important factors of investing in their associates' health was to make sure that peers could spread the message and cheer each other on. And so, they encouraged 105 associates across 200 locations to become Well-Being Champions.

Their Well-Being Champions are tasked with:

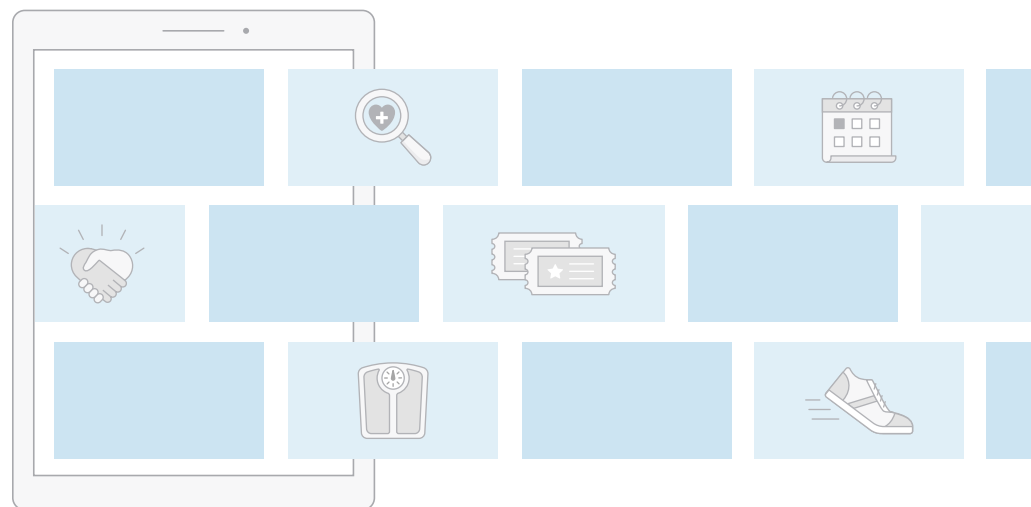
- Leading and promoting associate well-being at the local level.
- Ensuring fellow associates had a general understanding of the available well-being programs.
- Distributing well-being communications to associates at their specific location.
- Striving to achieve 100% well-being program participation at their worksite.
- Sharing feedback, gathering stories, and taking pictures to promote the program.



I think the Well-Being Champion is a huge resource for our team. It is personalized when someone you know sends emails on these types of activities—even open enrollment. I sent a reminder and my team emailed me directly to say they were on it!”

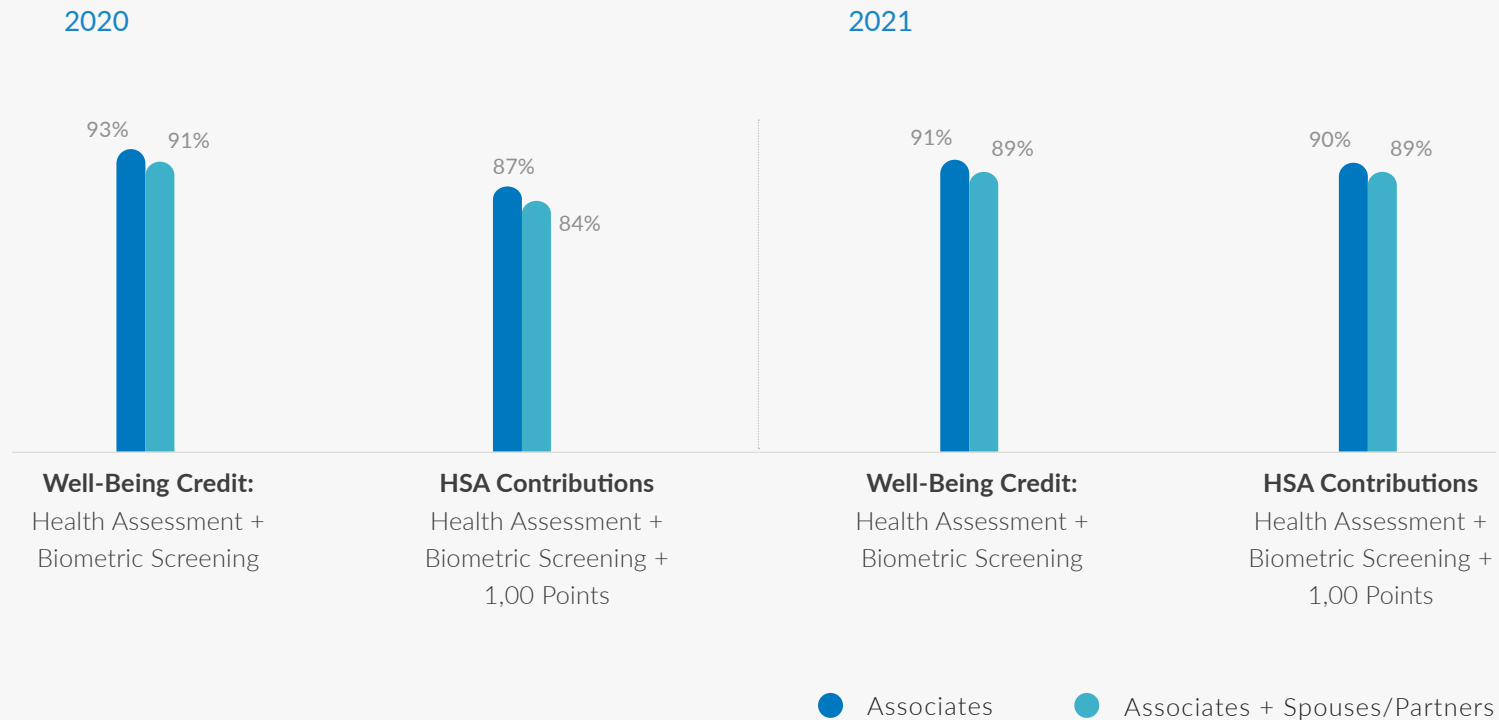
ANONYMOUS ASSOCIATE

Baird's Well-Being Champion Survey Response



The results.

Baird started with 45% participation, and the firm is excited to show how much its participation rate has grown! With the help of WebMD Health Services, Baird has seen extremely successful engagement, even during the pandemic and with the removal of their onsite screenings—which not every organization can say.



Looking forward.

To keep the momentum going, Baird continues to focus on a holistic program strategy that supports both associates and their families. The firm's well-being strategy includes five key sections that associates can engage with:

- **Physical:** Find new and fun ways to eat healthy, get moving, and maintain a healthy lifestyle.
- **Emotional:** Learn how to manage and improve your emotional health and well-being.
- **Social:** Learn how to adapt to the new normal and form meaningful connections.
- **Environmental:** "Go Green" with different ways to embrace the outdoors and healthy eating.
- **Financial:** Learn how to manage your finances and protect your information.

With these key sections in mind, Baird's B\Well program team has planned a comprehensive calendar of events, milestones and activities to look forward to. They've also developed a marketing and communication strategy that's closely aligned to the calendar to ensure that timely messages are delivered to associates throughout the year. That way, associates know what's coming up, and Well-Being Champions can help grow excitement about participating.

WebMD Health Services also partnered with Baird on rolling out WebMD ONE, an enhanced well-being experience for their associates. The enhanced program now includes new features for Baird associates, including:

- A personalized platform that provides access to all Total Rewards benefit vendors.
- New wellness challenges to have a little healthy competition with colleagues.
- Free health coaching and stress management support.
- Tracking of health data and goals, including new Daily Habits Plans.
- Access to healthy recipes, mental health podcasts and wellness videos.

The **takeaways.**

Baird's strategy is simple, but organizations often overlook these critical areas. Here are Baird's takeaways for developing a successful well-being program that associates will actually use and appreciate:

1

Listen.

Learn what your associates actually want, and be receptive to their answers. Then, find ways to provide the support they're looking for.

3

Personalize the program.

Make sure the well-being program works for everyone. Personalizing it for each associate helps increase engagement rates and allows each person to work on areas that matter most to their individual well-being journey.

2

Use Well-Being Champions.

Find a passionate group of well-being champions or ambassadors within your organization, and use them to promote the program.

4

Use incentives that matter.

Baird associates appreciate that participating in the program allows them to pay less for their medical insurance premiums. While that works for Baird, it may not work for other companies. Consider what kinds of incentives matter to your population, and use them to your advantage.

For the last 7 years, we've helped Baird innovate and evolve its wellness program to engage associates and inspire well-being. We're proud to be part of Baird's story and excited to continue providing value to Baird associates through data-driven well-being initiatives.



Empowering Well-Being In Everyone