

Engagement Analytics and Insights for Financial Services

The most successful financial services firms know that it takes engaged employees in each of investments, distribution, and support to deliver great results. It's not simply about happiness or job satisfaction - it's about involvement, motivation, and effort. Our sector-specific tools, analytics, and insights measure your employees' engagement and identify where to focus your resources for greatest impact.

With the industry in a state of change, Talent is a key lever for driving results and growth. More than ever, leaders in the sector need to consider:

- How are our peers doing?
- How do we retain our key staff as we increasingly compete with other industries?
- Do we have a pulse on how our employees view their work experience?
- How do we go beyond pay to motivate our employees in an age of constrained pay and greater regulation?
- What are we doing to maximise retention of our high performers and high potentials?
- What should we prioritize with our limited budgets?

Employee Engagement Matters

Aon's extensive employee research shows that:

- A 5-pt increase in engagement results in **3-pt incremental revenue growth**
- Companies with top quartile engagement experience a **4-pt increase in incremental operating margin**
- Highly engaged sales forces **exceed sales goals by 4%** on average
- Highly engaged employees are **36% more likely to stay** at an organization

We're here to empower results

Contact us to learn more about engagement analytics and insights in financial firms:

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We have been conducting employee research for over **50 years** - we have surveyed over **9 million employees** and **400+ financial services firms** on engagement and culture.

Engagement Drivers for Financial Services

- Brand**
 - Employment brand / reputation
- Leadership**
 - Senior leadership
 - Manager once removed
 - Manager
- Performance**
 - Career and development
 - Managing performance
 - Rewards
 - Recognition



- Company Practices**
 - People practices
 - Manager support
 - Risk culture
- The Basics**
 - The Basics includes benefits, retirement, physical work environment, work/life balance, co-workers
- The Work**
 - Collaboration
 - Empowerment and influence
 - Enabling work
 - Work tasks

Engagement Outcomes

- Say**
Employees consistently say positive things about the organization
- Stay**
They intend to stay with the organization
- Strive**
They strive to achieve above and beyond what's expected in their daily role

Business Outcomes

- Financial**
Revenue / sales growth
Op. income / margin
Total shareholder return
- Operational**
Productivity
- Customer**
Satisfaction
NPS
Retention
- Talent**
Retention
Absenteeism
Wellness

Engagement Analytics and Insights for Financial Services

A streamlined approach with options to fit your needs and budget

Option 1: Foundations

Includes:

Your questions:

- How engaged are my employees?
- How do our employees view their work environment?
- Are our results consistent or do they differ across the firm?
- How do we compare to others in our sector?

Our solutions:

- Employee engagement score
- Engagement driver and survey item scores
- Sector engagement priorities and benchmarks
- Website access for your HR team to view, compare, and benchmark results
- One hour expert briefing

2017 Survey Administration Schedule

Survey Option 1 (**Foundations**) and Option 2 (**Insights**) can be scheduled in the March / April or September / October time frame.

Option 2: Insights

In addition to Foundations, includes:

Your questions:

- What will have the greatest impact on our firm's employee engagement?
- Which critical employee groups need attention to address engagement gaps?

Our solutions:

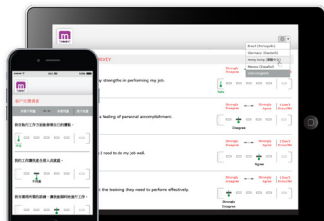
- Your firm's specific engagement priorities
- Website access for managers to see results and plan action
- Website functions to segment results, understand priorities, and define actions
- Add ten of your own items to our standard Asset Management survey
- Two hour expert briefing including insights and recommendations

Option 3: Tailored*

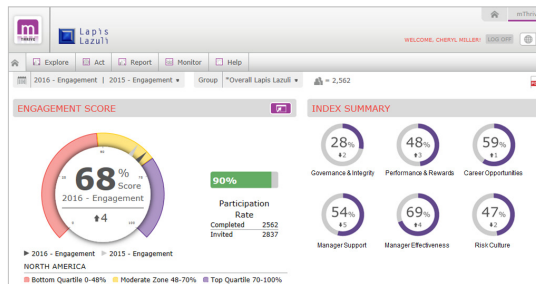
All the benefits of Insights with dedicated project management, consulting expertise, and additional flexibility to schedule survey, administer and report multiple languages, and tailor survey design.

*Price is scoped per engagement.

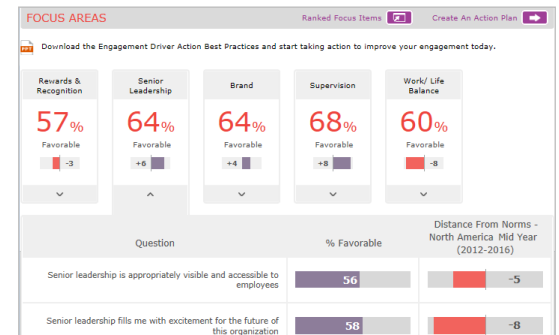
Easy survey interface



State of the art technology to get the story quickly



Industry-specific analytics to focus action



Enhance your engagement

Leverage more of our industry-specific analytics and consulting expertise to help you drive change and accelerate performance:

- Workplace culture assessment and gap analysis to achieve desired state
- Role-specific engagement-performance-compensation linkage analysis
- Facilitated action planning workshops and solution-specific consulting (e.g., total rewards, leadership, selection)

It's simple to get started

Sign up and get ready

- Register with our Talent Consulting Lead
- Decide your option and prepare to launch

Gather employees' feedback

- Partner with an Aon project manager to administer your survey
- Monitor and encourage participation

Understand results and insights — then act

- Access results website
- Participate in briefing
- Initiate action