

Securing Leadership Buy-In: Creating a Business Case For Change

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Many organisations start with good intentions around wellbeing, however, end up with a list of activities or solutions, some internal, some from external providers, which although helpful, cannot be classed as a 'wellbeing strategy'. Therefore, it is essential to take an integrated approach to build a wellbeing strategy in the same way any other business strategy would be created and executed.

We must remember that wellbeing will mean different things to different people and we can never simply take a 'onesize fits all' approach. However, investing in wellbeing can bring numerous positive benefits to the workplace such as:

- Reducing costs –absence, attrition, presenteeism whilst unwell etc
- Attracting and retaining top talent
- Supporting a positive and psychologically safe culture
- Higher productivity & profitability
- Increased employee engagement (satisfaction & loyalty)
- Meeting legal and H&S obligations, whilst mitigating risks

This guide is a simple tool to help support you in preparing a business case for your senior leadership team. It's designed to help you articulate and sell the benefits of your chosen wellbeing solution by highlighting the key focal points and research findings to strengthen your case.

Following these simple steps will help shape your thinking to present a simple wellbeing strategy that is fit for purpose and tailored to your business. We suggest the following structure below...



1. Background. This is about setting the scene and capturing 'why' you need to change your approach to mental health and wellbeing within the workplace.



2. Findings. This is about what the research is showing and how your findings support a change in approach.



3. Recommendations. This is about matching organisational requirements with the most appropriate wellbeing solutions.



4. Benefits & How Success Will Be Measured. This is about conveying the real 'value add', which may be a mixture of anecdotal information, plus more quantifiable areas, linked to return on investment (ROI).



5. Costs. This is about comparing how cost-effective the solution will be, linked to any predicted ROI in comparison to current wellbeing spend.



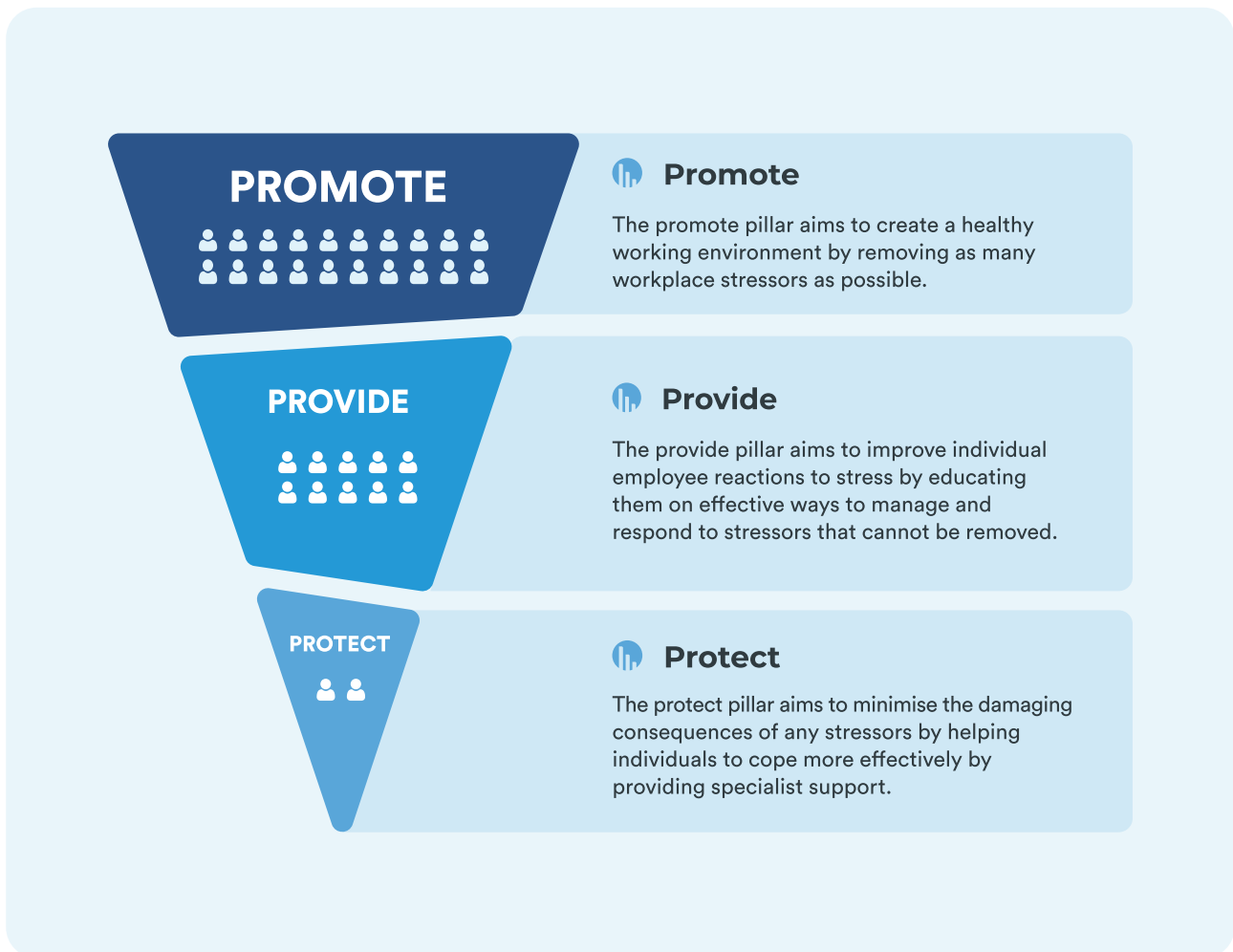
6. Conclusion & Next Steps. This is about convincing the leadership team of your final recommendation and that this can be a seamless deployment with limited time required by the organisation within the onboarding phase.



7. Execution. This should cover the actual execution plan, considering how the strategy fits together, with owners and milestones, plus any associated comms.

It's up to you whether you wish to use the entire structure or simply select the sections you feel will work best in securing buy-in from your leadership team.

Before we begin - A reminder of our approach



As you know, our philosophy is that businesses have focused far too heavily on a 'reactive' approach when it comes to mental health and wellbeing at work. These reactive solutions fall under the third pillar known as 'Protect'. These are typically reactive solutions that help individuals when they're in the midst of a crisis and whilst there is an imperative need for these solutions, they should not be the key focus of a wellbeing strategy. We believe a preventative approach is required to help avoid as many crisis situations as possible and truly support employee wellbeing. We shouldn't be waiting until someone is in crisis until it's visible for both the business and HR to see an employee struggling. Instead, the focus should be to prevent people from reaching a crisis point by having the right preventative support available to them. To find out more about our 3 pillars approach, simply click [here](#).

We'll start by explaining how Everymind at Work do this

- A number of proactive interventions are required since individuals engage with mental health and wellbeing initiatives in different ways. You can use a variety of interventions such as an app, workshop, webinars, coaching or any other format.
- Education is key. Through our webinars and workshops, we're able to address struggles that employees face in the workplace.
- None of us went to 'wellbeing university.' Strategic guidance and support are key if we're to solve wellbeing, our Wellbeing Business Consultants are here to make that possible.
- Ongoing wellbeing initiatives (that actually engage employees) are essential to driving down stigma and educating employees and managers all year round. We do this through our wellbeing calendar & roadmap, tailored employee comms, guides, resources and much more.
- Helping build your Wellbeing Champion network, which equips employees with the skills needed to break down stigma, support colleagues and promote a healthy working environment. Our comprehensive Advocate Training helps ensure MHFAs and Champions are appropriately trained and able to perform interventions correctly in the workplace.
- Supporting Wellbeing Champions through our Conversations Platform allows you to track the utilisation and impact of your MHFAs and Champions, along with uncovering the mental health challenges driving those conversations in the business.
- The Everymind App has a wealth of content covering dozens of helpful wellbeing topics; the anonymous usage data of which can be seen within a tailored employer dashboard, to track trends and in particular spot areas of concern.
- Our Everymind Coaching allows you to enrol employees into a 4-week programme, where we help individuals identify wellbeing goals, set targets and then go after them.
- Trust us, there's more... but we'll stop there.

What we've learnt from our clients:

Early intervention is key

Using our 3 pillar approach (Promote, Provide, Protect) clients have seen the benefits first-hand of early intervention as opposed to reactive, crisis-type solutions. With effective signposting, Champions drive a positive change in culture, an 'always on' listening culture with focused attention on prevention, this has proven to be more successful, getting employees to open up early so proactive interventions can take place around particular issues or struggles.

Breaking down stigma

We've found that continuing to break down stigma in the workplace and encourage the use of Champions and MH First Aiders creates a psychologically safe space and healthier workplace culture where individuals are able to be vulnerable with colleagues.

Mental health education within L&D

A lack of mental health and wellbeing education has contributed to the problem, education is the only way for individuals to increase self-awareness and better support themselves along with their colleagues. By focusing on integrating wellbeing into L&D, businesses are able to integrate better wellbeing as part of their culture.

MHFAs left unsupported are a business risk

MHFAs and Champions may be at risk of emotional burnout, secondary trauma and compassion fatigue. Their role can result in a strain on their own mental health, which if not supported or prepared for by the business could result in liability for the business. Ensuring they are supported is key.

Wellbeing must become a strategic imperative

There's no cookie-cutter approach available to simply improve wellbeing. Every business is different and that's why your strategy is key. This is where our Wellbeing Business Consultants come in, providing strategic guidance throughout the year and supporting in wellbeing initiatives, helping to shape culture into a place where employees can thrive and feel part of a positive, safe and open environment.



Creating your business case



Background

This is about setting the scene and capturing ‘why’ you need to change your approach to mental health and wellbeing.

Think about capturing the answers to these questions to articulate the ‘why?’:

- Is there a problem with your current wellbeing provision, are you trying to fix something or simply wish to make it more effective?
- What is your ideal ‘vision’ for wellbeing in the company, i.e. what are you aiming to achieve?
- Do you have any particular wellbeing goals which the company would like to work towards?
- Do you know what employees want from a wellbeing provision (have you asked them recently)?
- Have you made MH education and learning a core component of L&D programmes?
- Do you have any obvious gaps in your wellbeing provision?
- Do you have the appropriate resources available to achieve your aims internally?
- Are engagement/ pulse survey results highlighting wellbeing concerns?
- Are absenteeism, retention levels & productivity concerning, where mental ill-health is cited as a contributory factor?



What are the benefits of investing in mental wellbeing?

New research from Deloitte (published March 2022) has revealed that the cost to employers of poor mental health has increased, to a staggering £56 billion in 2020-21, compared to £45 billion in 2019.

To break this down, the estimated total annual costs of absenteeism, presenteeism (attending work while ill, and so underperforming or being less productive) and labour turnover have increased by 25% since 2019, reaching an estimated annual total of £53-56 billion in 2020-21 (£43-46 billion in the private sector and £10 billion in the public sector).

Additionally, many of the respondents in Deloitte's survey said they had left their job in the previous year or intended to do so in the next 12 months, and were doing so for mental health or wellbeing reasons.

However, this isn't just the cost.

These are only numbers attributed through research, there's a hidden 'ripple effect' that no one talks about.

A poor work culture can cause work-related stress issues for years and once embedded they can become very difficult to fix. Employers may then be blamed for poor culture which in turn can lead to liability in tribunal claims, particularly where for example discrimination has caused a personal injury (mental injury included) - where there is a risk to someone's health and safety - and the employer is aware of that risk and does nothing to address it - it can attract liability. The money spent on litigation, settlements and lawyers is also money that can't be spent on initiatives and improving culture.

The reality is that mental health impacts us all.



Facts & figures

Bringing it back to the numbers, research confirms¹:



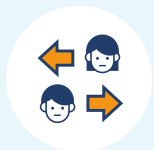
Investment returns are stronger than ever, with employers seeing a return of £5.30 on average for every £1 invested in wellbeing support, which is steadily increasing.



There has been an increase of 25% in the cost of poor mental health to employers compared to 2019.



28% of employees have either left in 2021 or are planning to leave their jobs in 2022, with a huge 61% citing poor mental health as the reason they are leaving.



Young people (18-29 years old) were found to be most likely to have moved jobs or be considering a job move.



One in five (21%) young people surveyed said they were planning to leave and one in four (24%) said they had intentionally left their job in the past 12 months.



Of those young people who had intentionally left or planned to leave their job, two in three (65%) said this decision was driven by poor mental health.



A 2021 survey by Mind of over 40,000 staff working across 114 organisations taking part in their Workplace Wellbeing Index revealed that two in five (41%) employees said their mental health had worsened during the pandemic².

¹ Mental Health and Employers –The Case for Investment –Pandemic and Beyond (Deloitte -March 2022)

² Coronavirus: the consequences for mental health, Mind, July 2021



Findings

This is about what the research is showing and how it supports a change in approach.

Think about capturing the answers to these questions to clearly articulate ‘why’ you need to change:

- What is your data telling you – i.e. data from absence, attrition, engagement surveys, wellbeing check-ins, exit interviews, general levels of productivity etc, will all help to shape a story, using quantitative data to back up your findings.
- What current providers are you partnered with (if any–EAP, counselling, Occupational Health etc) and do you have the usage/ trends data available from these partners?
- How much are you spending on these providers, in comparison to an Everymind at Work partnership?
- Include their usage levels as evidence of the change needed, i.e. EAP usage might be particularly low or counselling too expensive to provide in any great volume.
- How a more proactive approach reduces the need for expensive counselling, as preventative measures would likely lower the number of people reaching crisis point.
- Consider the governance needed around any new initiatives, i.e. meeting your legal H&S duty of care obligations, mitigating the risk of discrimination claims etc, all help to strengthen your case.



What does the research tell us about EAP and insurance benefits providers?

Typically, an employee assistance programme (EAP) model is skewed towards crisis intervention and is priced on the basis of very low usage levels (circa 3%-8%).

Many of the life issues faced by employees are not simple and traditional workplace solutions can fall short of what the real needs of the employee are. For instance, cost of living worries have heightened and money worries can become additional stressors, which can overlap anxiety and, in some cases, trigger serious mental health problems.

The EAPs are not only reactive to what's happening but they do not go deep enough to support the complex needs of many employees. **EAPs typically only offer a few counselling sessions and low-level practical advice, therefore not addressing the more complex needs which may be in place.**

According to the International Employee Assistance Professional Association, an estimated 97% of companies with more than 5,000 employees have an EAP; 80 per cent of companies with 1,001–5,000 employees have one; and 75 per cent of companies with 251–1,000 employees have an EAP. **The question is why are mental ill health stats continuing to rise and EAP usage levels still hover at around only 5%?**



Why EAPS often fail to shift the dial on wellbeing



Employees don't know what they are

Many employees simply don't know that these schemes exist much of the time. There is poor communication, or the scheme is wrapped up within an insurance plan, with the details being hard to find without asking for help – which people often feel uncomfortable doing.



They can be costly and inefficient

Whilst some employees will benefit from the services, research suggests that EAPs only reach usage levels of circa 3%-8%, and in terms of fees paid vs usage, this is poor and not cost-effective.



'One size fits all' is not appropriate

EAP's pricing models are structured on very low-level use of counselling/ helpline services, therefore should requirements spike, these renewal fees may become far higher than expected. Plus, there is no assessment of personal needs with an EAP, with a 'cookie cutter' approach to the general provision on offer.



Outdated in approach

EAPs will very often not be aligned to a culture of wellbeing as they are deemed too corporate or clinical, so underutilised as hidden away and not openly talked about. They're no longer fit for purpose in a changing world, which needs a different approach to wellbeing, one which is more personalised and open.



Limited feedback and analytics

Data availability is scarce and will likely only cover general usage of areas such as a helpline, as opposed to critically analysing trends and where the key issues lie.



Hard to navigate alone

Often people mistakenly believe that HR / Line Management needs to give them 'permission' to use the EAP, which again often prevents engagement for fear of judgement and reprisals in work.



The stigma attached to them

Linked to above, many employees still feel a huge stigma exists in asking for help via an EAP/ benefit provider, as their culture has not moved forward in a more positive, open and safe way.



Recommendations

This is about matching organisational requirements with the most appropriate wellbeing solutions.

Think about capturing the answers to these questions to articulate the best match:

- What would be most beneficial to the organisation, based on the culture and current wellbeing offering?
- Confirm your wellbeing objectives based on what you have gleaned from your background review.
- Confirm available budget (and approval for spend) and estimated costs.
- What are the reasons for discounting other providers or other wellbeing solutions, i.e., why other solutions were not deemed suitable in this instance –e.g. cost, lack of flexibility in the offering, an app-based solution that's not as comprehensive, partnership approach more proactive and personal etc.
- How would anything new be integrated into the organisation - how much time and resource is this likely to take up?
- Remember, having a partner in Everymind at Work will remove some of these concerns and allow the business to operate more efficiently, as much of this work will be alleviated by the partnership.



How can Everymind at Work help?

- We take a partner-led approach to working with you, tailoring our proactive solutions to fit the needs of your business.
- The key to our success is knowing your business and providing that personal touch to ensure we tailor our support to where you really need it.

This is achieved via various wellbeing interventions:



Our 12-Month Wellbeing Roadmap



Wellbeing Webinars



Management Training



'Champion' and Advocate Training



Our Conversations Platform



Ongoing MHFA Support (Supervisory Sessions)



Your Wellbeing Business Consultant



Access to Everymind Wellbeing Coaching



The Everymind Wellbeing App



Your Everymind Wellbeing Dashboard Data

The more we work with our clients and become an extension of their HR or Wellbeing team, the more we can add value and link our interventions to your findings to ensure we're really targeting support in the areas where your employees need it most.

Having a personal approach, which can be flexed to your needs, ensures that your employees benefit from early intervention and feel safe to speak up and share their concerns, as we'll work with you to create this type of culture and seek feedback on its effectiveness over time.



Benefits & How Success Will Be Measured

This is about conveying the real 'value add', which may be a mixture of anecdotal conversations plus quantifiable areas, linked to ROI.

Benefits

Think about capturing the key benefits to articulate the 'value add' and how they will be measured in practice:

- Via your Wellbeing Business Consultant, receiving employee comms, free guides, implementing 'Champions', running webinars, training and access to the knowledge and experience within the Everymind at Workteam will benefit the organisation, over a longer period of time.
- How the data and analytics seen within your employer dashboard can be used to measure success and allow you to focus on the right areas.
- Over time, the quantifiable effect on absenteeism, retention levels, presenteeism (when ill), productivity and overall engagement, resulting in a culture supportive of wellbeing, which in turn reduces costs in these areas.
- The new data from Deloitte very clearly shows that employers are losing billions each year in terms of the effects of mental ill health and not adequately addressing the issues early on.
- A partnership provides tangible evidence from a legal standpoint, which strengthens your case for risk mitigation, should any mental health claims be lodged under the Health & Safety at Work Act.
- Plus, research suggests that not tackling poor mental health can go on to create more serious (and costly) issues such as burnout and depression, which supports the case for focusing on early intervention and preventative measures.

Measuring Success

Think about answering:

- What will your timescales be for reviewing and assessing effectiveness?
- What are your agreed KPIs and over what timeframe will they be measured (monthly, quarterly, yearly? etc)
- Can you use employee surveys to probe and ask specific questions within a health and wellbeing section of the survey – this will help determine which initiatives are working and which need further thought.
- How will you implement the necessary feedback loops, to show that leaders have listened to employee feedback – this is where Champions & MH First Aiders can help.
- Remember that employee needs will change and what was once attractive (on-site gym, subsidised café etc) may no longer be attractive due to remote/ hybrid working becoming more permanent, so regular reviews of any provision are suggested to ensure continued engagement with employees.



Costs

This is about comparing how cost-effective the solution will be, linked to any predicted return on investment, in comparison to current wellbeing spending.

Think about capturing the key costs to articulate the proposed spend, in comparison to any existing provision:

Consider:

- How much are you currently spending on wellbeing activities each year?
- If you have an EAP, is it being used at a meaningful level?
- If this usage level were to significantly increase, how would this affect your renewal fees?
- Can you be creative with budgets, ie use of a benefits, L&D or wellbeing budget?
- Consider some of the more indirect costs associated with wellbeing, such as the positive effect on your EVP, i.e. attracting new talent.
- Would your budget be better spent on more proactive, preventative solutions?
- How does the cost of the **Everymind at Work** solution compare to other providers you may be considering?



How can ROI be demonstrated in the future?

The new Deloitte research shows that proactive interventions have proven to bring better outcomes and higher returns on investment than reactive approaches, and with a healthy individual, society usually benefits too.

In terms of specific costs Deloitte¹ found:

- The costs of presenteeism are the highest of the three cost categories (absenteeism, presenteeism, turnover), but the increase in total costs has been attributable to a steep increase in the costs of labour turnover. Deloitte's report considers presenteeism when individuals are experiencing poor mental health.
- 40% of total turnover costs are now attributable to mental health issues.
- At £6.1 billion in 2020-21 mental health absenteeism is the smallest cost category and is slightly lower than in 2019.
- They estimate that the cost of 'mental health-related presenteeism' to employers is £24–28 billion in 2021 – roughly four to four-and-a-half times the cost of mental health-related absenteeism.
- According to their survey findings, presenteeism caused by poor mental health amounts to about 46% of the total costs of presenteeism in the UK workplace in 2021.
- The annual costs to UK employers of poor mental health are estimated as the combined costs of absenteeism, presenteeism and labour turnover. These have increased in total by 25% since the start of the pandemic, up to £53-56 billion in 2020-21, which equates to over 2.6% of the UK's annual Gross Domestic Product.

1 Mental Health and Employers –The Case for Investment –Pandemic and Beyond (Deloitte -March 2022)





Conclusion & Next Steps

This is about convincing the leadership team that this can be a seamless process with limited time required by the organisation within the onboarding phase.

Think about:

- How quickly sign-off could be obtained and what this would mean for a 'go live' date.
- Does procurement need to be involved from a new supplier perspective?
- Anticipate questions from the leadership team to ensure key stakeholders are bought in.
- Be ready to discuss revised costs and package options should the budget be a concern for the Finance Director and/ or HR Director.
- Remember that Everymind at Work can be flexible to suit your needs, so we can easily alter your package to meet the requirements of your organisation.





Execution

This is about the plan for deployment and who would need to be involved to make this successful.

Communication and launch:

Suggestions to consider:

- Hold focus groups prior to launch to gauge opinion and obtain ideas –could be existing people forums or new groups specifically for this initiative.
- Can you also involve wellbeing Champions and MHFAs if already in operation?
- Determine the best way of communicating to leaders first, then employees, to ensure the whole group is involved and the key messages land well.
- Make the connections to the wider group strategy – i.e. if the group strategy has an overarching ‘people’ pillar with an ambition to improve wellbeing, this can be highlighted as the connecting solution.
- Consider the locations and accessibility of materials, to ensure an inclusive approach is adopted.
- Ensure all employees are captured in the launch, using different comms methods where applicable, which Everymind at Work can support with.

Presenting the strategy:

Our wellbeing strategy template here provides a simple model that will help you ensure you’re able to land all of the key messages and effectively articulate your strategy.

It is important that your wellbeing objectives are SMART to ensure they are meaningful and can be measured.

Saying “we want to improve employee wellbeing” is a nice sentiment however it is too subjective to be meaningful and does not allow for measurement of success.

Being specific such as “By the end of Q4 2023, 80% of employees will feel as though their general wellbeing has improved since the last engagement survey”. There might be lots of activity attributed to this objective, however collectively if it shifts the dial on this metric then it will be a positive result.

It is likely that you’ll have project plans sitting beneath your objectives, with appropriate timescales to ensure you have a baseline to measure from. This is simply a high-level overview which outlines the main wellbeing ambition and objectives, with the finer detail sitting behind it within a project plan, for individuals to see where they have accountability for specific activities.

We really hope you found this guide useful and do reach out to the [Everymind at Work](#) team should you require any further support