



MONY
GROUP

Presents



THE BIG MONY WORKSHOP

Contents

What is the Big MONY Workshop?	3
The benefits of hosting a Big MONY Workshop	4
How to run your own workshop	5–6
How to plan your talks	7
How to get people hyped!	8

What is it?

The **Big MONY Workshop** is a dedicated financial wellbeing event that gives colleagues protected time, expert guidance, and practical tools to improve their finances.

The workshop combines:

- Expert-led talks
- On-demand learning
- One-to-one financial guidance with benefits partners
- Dedicated time to take action on personal finances

Combining these activities, the workshop helps employees build financial confidence, make informed decisions, and get more value from their pay and benefits.

The benefits of hosting a Big MONY Workshop



Benefits for employees

- Better understanding of pay, pensions, and workplace benefits
- Access to trusted financial guidance
- Dedicated time to complete important financial admin



Benefits for teams

- Creates opportunities to connect and share advice
- Encourages conversation around financial wellbeing
- Strengthens workplace community



Benefits for employers

- Demonstrates investment in employee wellbeing
- Increased awareness and take-up of existing benefits
- Supports attraction and retention efforts

Run your own workshop

DAY 1

12pm: Welcome lunch

- Bring employees together
- Introduce workshop
- Share the agenda

1pm onwards: Talks and sessions

- Run sessions between 30 and 60 minutes
- Use multiple rooms or stagger talks
- Record sessions for people unable to attend

End of day: Social

- Informal networking with drinks and snacks
- Encourage sharing of money-saving ideas

The structure of your workshop will depend on the needs of your organisation, but here is what works for us.



Tip: *The social aspect of the day is a big part of the workshop, and we've found that once the conversation gets started, people love to share their own money-saving tips. Try to encourage in-person attendance and, if possible, set up an area for the event where people can gather.*

Run your own workshop

Tip: *Protect workshop time. It's key to success, so avoid scheduling meetings and give people the space to put their learning into practice.*



DAY 2

9am: Action time

Give your employees protected time to act on what they've learned. This can include:

- Consolidating pensions
- Reviewing subscriptions
- Checking workplace benefits
- Creating a budget
- Comparing and switching household bills

Ask participants to share any savings or actions completed in a central place – a teams or slack channel can work well for this

12pm: Workshop close

- Thank participants
- Share results
- Celebrate savings and successes

Plan your talks

How to pick your topics

When picking your topics for the day, make sure you have good variety that will work for as many employees as possible. Think of common problems people share or give attention to people that may need some extra support, like parents and carers.

Tip: *Try to link back to your goals and culture as an organisation. Think about what's important to you and use that as a launch pad to find the topics that are right for your workshop.*

Where to source your experts

The first place to look is internally. There's more to saving money than being a finance expert. You may have some particularly savvy colleagues with some tips to share on cost saving activities.

Potential speakers might include:

- Benefits teams and providers
- HR teams
- Pension specialists
- Employee wellbeing champions
- Employees with useful skills or experiences

Get people hyped!

A successful workshop starts long before the event itself, giving employees plenty of time and opportunity to learn the day's agenda and get involved.

Use a mix of communications and incentives to build awareness, including:

- Formal calendar invitations
- Posters and desk drops
- Internal newsletters
- Teams or Slack reminders
- Branded merchandise and giveaways

Competitions and savings-trackers can be a good way to get people engaged with the workshop.

Give coworkers a way to share their money-saving success stories in a central location – teams or slack can work well for this.

At the end of the workshop, you can tally savings figures and share the savings total – a good measure of success to keep track of if you want to plan more workshops in future – and celebrate the biggest savers with shout-outs or even prizes.

Tip: *Not everyone is going to feel comfortable sharing their savings figures. While people should be encouraged to share their success, it should always be optional.*

