



How to win the case to invest in employee health & wellbeing

Prevention and early intervention of workplace health and wellbeing issues is better than cure, but convincing internal stakeholders of the business benefits can be challenging.

That's why we've put together this step-by-step guide to help you develop a considered and powerful business case to ensure your staff are 'well beings'.



1. Refer to your overarching corporate, and health & wellbeing objectives

Consider your overall business strategy and how health and wellbeing fit into it – is this well understood? If not, wellbeing programmes are at risk of being eliminated where resources become limited.

Driving business imperatives might include:

- Corporate objectives: controlling costs, improving productivity, product launch, project delivery, etc.
- Risk management objectives: reducing existing risks (reputation, legal, accidents, etc.), meeting legal requirements, etc.
- Personnel / health and wellbeing objectives: absence, presenteeism & engagement, staff turnover, recruitment and retention, rewards strategy, etc.

If you haven't yet got a health and wellbeing strategy, our Health and Wellbeing Planner can help to get you started.

2. Gather evidence of the problems you want to address

Substantiate the nature and extent of any current problems in order to build your business case. This can come from your existing health and wellbeing strategy. This may include:

- Key metrics: absence rate, absence related costs (sick pay, NI contributions, additional staff costs, etc.), estimated presenteeism, staff turnover rate, lost knowledge, recruitment costs, etc.
- Anecdotal evidence from return to work interviews, exit interviews, employee surveys, etc.
- Risk exposure and possible scenarios: legal cases, legal requirements, brand reputation, accidents, etc.

3. Define the SMART objectives for the proposed investment

Align your corporate objectives, health and wellbeing strategy and people strategies, illustrating the impact of investment in employee skills, attitudes and performance on people objectives such as liP status or 'Company of Choice', and ultimately to organisational success.

Set realistic return on investment targets against industry benchmarks, and set SMART objectives based on ranges of acceptable performance.

4. Know your stakeholders and consider their levels of interest and influence over the investment decision:

Typical stakeholders include:

1. Senior management
2. Procurement
3. Middle management and first line managers
4. Health & safety, Occupational Health colleagues or external providers
5. Employees
6. Union representatives

Consider what factors influence the decision maker. Do they have personal interests, and are they financially, emotionally or rationally biased in their decision making?

Are senior stakeholders members of business groups that actively promote health and wellbeing initiatives (BITC, liP, CBI, etc.)?

Does the Finance Director require greater control of costs achievable through better health and wellbeing? (e.g. lower recruitment costs from lower staff turnover).

Does the Human Resources Director focus on goals like liP or 'Company of Choice'?

Can Procurement be convinced that value for money is more important than the lowest price?

Can the introduction of health and wellbeing benefits be demonstrated as being integral to the role of Health & Safety and Occupational Health colleagues?

Can you demonstrate to line managers that health and wellbeing can be truly transformative; it has the power to help you enhance employee engagement, increase productivity and lower absence rates, by showing you how to put your staff's needs first.

Engage with union reps to support the introduction of health and wellbeing benefits to demonstrate the value of union membership.

5. Gather your forces

- For a unified impact, HR, Health & Safety, Occupational Health, and unions should work together.
- Elicit feedback from your liP Assessor on how to align your proposed investment with other people initiatives.
- Seek support and advice from benefit providers or intermediaries. They can help you build a solid business case for investment. You could also employ the services of an external benefits advisor to assist.
- Talk to key stakeholders before presenting your final business case to ensure you address their needs and get their buy in.

6. Explain the health & wellbeing investment

Make the decision makers aware of the benefits proposed, with background information, case studies, etc.

- Detail the time and resources required for implementation.
- Set out how tax affects the proposed benefits – any tax efficiencies and savings possible.
- Show how new investment will integrate with related people policies, initiatives and processes.
- Demonstrate the process you followed to arrive at your recommendations, illustrating the pros and cons of the alternatives.

7. State your measures of success and return on investment (ROI)

What are the right measures of success for your organisation?

- Staff participation / benefit take up rates.
- Impact on your organisation's key metrics (monetary where possible): absence rate, absence related costs (sick pay, NI contributions, additional staff costs, etc.),

estimated presenteeism, staff turnover rate, lost knowledge, recruitment costs, etc.

- Include a cost-benefit analysis or ROI calculation, stating assumptions and risks. Explain the mechanisms that link the investment to the expected outcomes.
- Have a long term view with ongoing measurement, and a review cycle in order to win sustained investment.

8. And finally, keep communicating with stakeholders

Continue stakeholder communication after getting the go-ahead. Report progress and performance and seek feedback to ensure you receive ongoing support for your health and wellbeing initiatives (see 'Your guide to achieving employee engagement').

Let us know how you get on.

We'd love to hear about your trials, tribulations and successes in winning the resources for health and wellbeing, including any tips that we can incorporate into future editions of this guide.

Join the conversation and follow us on LinkedIn and Twitter [@westfieldhealth](#)



References and where to go for further help:

- 'The Business Case for Employees Health & Wellbeing: A report prepared for Investors In People UK' by Stephen Bevan of The Work Foundation, April 2010.
- 'Building the Business Case for Managing Stress in the Workplace' CIPD, November 2008.
- 'The Value of Rude Health: Report for Royal Mail Group' by David Marsden and Simone Moriconi of LSE, May 2008.
- 'Building the Case for Wellness' Report PricewaterhouseCoopers, 2008.
- 'Stakeholder Analysis: Winning Support for Your Projects' article on the Mindtools website.
- The CIPD's 'Health, Safety and Wellbeing' webpages for factsheets, research, policy reports and guides on health and safety, occupational health, employee wellbeing and more.
- The Health & Safety Executive for a wealth of guidance and resources including, advice leaflets and newsletters covering everything to do with work related health, safety and illness.
- The IIP's 'Health and Wellbeing Award' is flexible, easy-to-use and outcome focused to help companies improve performance by fostering a happy, healthy workforce.
- The British Heart Foundation's 'Health at Work' programme offers free tools and resources, including newsletters, an online forum, and events services, to help you start a health club at work and address employee wellbeing, activity levels, diet, smoking etc.
- Mind's 'Mental Health at Work' website provides lots of resources about managing mental health issues at work including webinars, training and consultancy.

We believe in **well beings**

Start your health and wellbeing journey today:

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