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Octopus Money in the workplace

Employer case studies



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CASE STUDY

How a law firm and D&I leader is innovating financial wellbeing



Browne Jacobson is one of the UK's most progressive law firms. They're ranked #1 in the Social Mobility Foundation's Employer index. To support a workforce spanning junior staff to senior partners, they needed a financial wellbeing solution that was as inclusive and impactful as their wider D&I strategy.

Their existing self-guided content was a good start, but the team knew they needed to go further. "We can't expect that everybody is going to log in to an app and read through financial wellbeing articles. You probably have to be fairly engaged in personal finance already to take the time to do that," says Adam Fox-Everitt, Head of Reward. "Plus, there's so much content available now, it's easy to get lost."

That's why they partnered with Octopus Money to offer every employee 1-to-1 coaching - starting with a free session and

continuing support available via salary sacrifice. The result is a truly personalised experience, with clear outcomes.

"We realised that 'one size fits all' actually fits no one. Coaching is different. Whatever's on your mind, you talk to your money coach and they help guide you in the right direction."

The benefit is now a key part of their employee value proposition - and the feedback has been outstanding. Employees say it's like "a personal trainer for your wallet" and appreciate having a real human to speak to about their goals.

For Adam, it's already paid off. "I've been impressed and even taken aback at the quality of conversation with my coach and how it's made me think about things bigger than money. For me and my family, it already paid for itself after just 2 sessions."

**"We realised that
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Adam Fox-Everitt, Head of Reward

#1

employer in the Social Mobility
Foundation's Employer Index



CASE STUDY

How a financial services innovator builds financial resilience



MONY Group (formerly Moneysupermarket Group) wanted to reflect its consumer-facing mission internally, by helping employees build long-term financial resilience.

"Financial resilience directly links to mental health and overall wellbeing," says Tracey Quiggin, Head of Reward. "We wanted something accessible, holistic, and practical."

That's why they introduced Octopus Money: giving every employee a free session with a qualified money coach. From there, employees could opt into full financial planning support via salary sacrifice - a model that's simple, inclusive, and cost-effective.

For Tracey, simplicity was key: "Octopus makes finance jargon-free and easy to engage with." In the first year, household wealth improved by an average of £3,000, and is projected to grow by £50,000 over 10 years.

Coaches don't just talk theory. They build clear plans tailored to each person's goals — from buying a home to preparing for retirement. And thanks to the "try-before-you-buy" approach, employees can build trust with their coach before committing further.

Tracey says, "Octopus Money aligns with our purpose of helping households save money. It's helped our people take confident action — in ways that matter to them."

£3,000

average wealth growth in year one



4.8/5 average session rating



CASE STUDY

How a media powerhouse retains great people with financial wellbeing



Dentsu UK, with over 4,000 employees, operates in one of the most competitive talent markets in the world. To stay ahead, they set out to elevate their benefits strategy. Financial wellbeing quickly emerged as a top priority.

They already had digital tools and education in place. But after reviewing the landscape, they saw the shift: employees were looking for more personalised, 1-to-1 guidance. That's when they partnered with Octopus Money.

Now, every employee gets a personal invite to a free session with their own money coach. "We picked a launch period with high

visibility, and got strong buy-in from leadership," says Sam Wilkerson, Reward Analyst. "I don't think we've ever had such good take-up."

Over 1,200 employees have already met their coach, and rated the experience 4.9 stars on average. "People appreciate that it's not just about finance. Coaches are empathetic, human, and help you take action," says Sam.

Even better? It's all delivered in a cost-neutral way to the business, thanks to a salary sacrifice model that funds deeper support for those who want it.

"You can read all the articles you want, but it's great to have a friendly face to talk to, to bounce ideas off of and to explain things in a relatable way"

"I don't think we've ever had such good take up. It has set the benchmark for all our benefit launches"

CASE STUDY

How a financial services firm is breaking the money taboo



Blick Rothenberg is an award-winning tax, audit and advisory firm known for putting people first. CEO Nimesh Shah believes that true wellbeing includes financial confidence – and led the search personally for a new provider to support his team.

Despite being full of financial professionals, the team knew personal finance was still a taboo. “Even for accountants, money can be taboo subject,” says Nimesh.

That’s why they partnered with Octopus Money to offer every employee a personalised 1-to-1 experience. Since introducing the benefit Nimesh said “I have never received so many messages of thanks from our people”

Employees are matched with a financial coach and invited to a free, confidential

session during work hours – with the option to continue their journey afterwards. Many choose to include their partners, too.

The response was immediate. Over 65% of employees booked a session within the first few weeks. “People are talking about how it’s such an easy experience – which is really important, because if these things are difficult, then you shy away from it” Nimesh says “Your coach emails you, you choose a slot in their diary and then, you’ve got a 1-to-1 meeting in less than a week or so”

The result? Better financial confidence, more open conversations – and impact that’s spreading. “Someone told me she’s saving more by cutting one night out a month and putting that into her pension. That kind of thinking is happening all across the firm.”

**“I have never received
so many messages of
thanks from our people”**

Nimesh Shah, CEO

**“In professional services
and financial services
there’s not always a safe
space to talk about your
own financial goals and
how to reach them.”**

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