



| Building a Better Workplace Together – 2023

Why Are We Here?



Review

Review the results of our
Building a Better Workplace
Together Survey – May
2023



Discuss

Discuss the implications of
these results and what they
mean for us as an
organization.



Identify

Identify focus areas and
take action.

What Are We Comparing To?



2022

Pulse Survey

Pulse surveys provide more immediate and actionable insights that can be used to make quick changes and improvements.



2021

Make Your Voice Count

Engagement surveys provide a more comprehensive picture of employee engagement that can inform longer-term strategies and initiatives.

We are comparing these results with our previous survey results.

Participation Rates By Business Unit

Building a Better Workplace
Together - 2023

89%

Responses: 566 of 639

Planning Services, 100%

Legal & Risk, 100%

Product, 100%

People Experience, 100%

Client Services, 93%

Financial Planning, 75%

Business Development, 81%

Technology, 85%

Finance, 87%

Marketing, 90%

70% of Culture Amp customers have response rates between 75% and 90%.

Why is Engagement Important?

Our engagement score



2023

Building a Better Workplace
Together

84%

How we compared based on:



2022

Pulse Survey

71%

Questions we asked:

1. I would recommend eMoney Advisor as a great place to work
2. I am proud to work for eMoney Advisor
3. I rarely think about looking for a job at another company
4. eMoney Advisor values diversity, equality and inclusion
5. In general, I feel what I am doing at work is worthwhile

Strengths

Highest 3 Scores

I am able to arrange time out from work when I need to 96%

My manager genuinely cares about my wellbeing 95%

My manager is available to support me when needed 94%

Highest 3 Scores vs. Previous

I have access to the things I need to do my job well +27 90%

I believe employee wellbeing is a priority at eMoney Advisor +24 87%

Day-to-day decisions here demonstrate that quality and improvement are top priorities +20 77%

These are the key areas we are excelling in, and most improved areas compared to our previous survey.

Factor Summary

Factor	2021	Pulse-2022	Score
Manager Effectiveness	88	87	89
*Inclusion	N/A	N/A	89
Alignment & Involvement	75	67	88
Teamwork & Ownership	82	81	87
Enablement	72	N/A	86
Work & Life Blend	87	96	86
Engagement	72	71	84
Learning & Development	75	75	83

Factor	2021	Pulse-2022	Score
Innovation	68	72	81
*Total Rewards	N/A	N/A	79
Leadership	67	62	78
Collaboration & Communication	65	71	78
Company Confidence	70	71	78
Service & Quality Focus	66	62	77
Social Connection	79	84	75
Action	55	63	74

Previous Focus Areas



2021

Make Your Voice Count

The leaders at eMoney have communicated a vision that motivates me

58% Favorable

eMoney is a great place for me to grow as a professional

68% Favorable



2022

Pulse Survey

The leaders at eMoney have communicated a vision that motivates me

62% Favorable

eMoney is a great place for me to grow as a professional

71% Favorable



2023

Building a Better Workplace

The leaders at eMoney have communicated a vision that motivates me

70% Favorable

+18%

I believe there are good career opportunities for me at eMoney Advisor

74% Favorable

+8%

Focus Areas From Previous Surveys

“The leaders at eMoney have communicated a vision that motivates me”



Mission & Vision

- **Mission:** Helping People Talk About Money
- **Vision:** Financial Peace of Mind for All

CLT Office Hours

- Hosted monthly
- **30** employees attended YTD
- **96%** of attendees recommend their peers attend

Strategic Priorities

- Protect and grow our core business profitably
- Make marked, measurable progress in our technology evolution
- Live and breathe our core values

Refreshed Core Values

- People-First
- DEI
- Collaboration
- Creativity

Focus Areas From Previous Surveys

“eMoney is a great place for me to grow as a professional”



Career & Professional Development

- **179** Promotions since Jan. 2022
- PX instructor-led courses (DIG)
- Talent Strategy workshops
- Career resource newsletters/emails
- Growth Week
- **194** employees attended leadership & professional development opportunities
- Facilitated **7** Clifton Strengths sessions (183 people)
- Facilitated **3** PX Compensation trainings
- Facilitated **4** third-party sessions
- **\$142K** spent for external training budget YTD!

Total Rewards



14%

Increase in Total Rewards
score since 2021!

Our Philosophy is Simple

We believe our employees deserve to be rewarded fairly & competitively in return for their contribution to eMoney's success.

Total Rewards Areas of Focus

Compensation | Health & Wellness | Rewards & Recognition

What Goes Into Total Rewards?



Competitiveness

Bi-Annual refresh of all market data to facilitate a “leading” position against market for majority of the year.

Benchmark for benefits and compensation against our industry peers.



Innovation

Constantly reviewing utilization of benefits to keep a pulse of what our employees are looking for, using and might need.



Multi-touchpoint

Work to ensure our offerings are helpful and available to as many of our employees (and their families) as possible.

Learn More About Us and Our Philosophy!

Total Rewards Statements



- Employees have access to a personalized Total Rewards Statement in ADP
 - *Myself>Pay>Total Rewards*
- Each section can be expanded to view detail including employer paid and employee paid section
- Nonmonetary benefits are listed in the area on the left, such as EAP, Wellness Benefits, etc.



Compensation Training 101 in DIG



This course contains a series of animated videos that are each less than 10 minutes long and are designed to help you better understand:

- eMoney's Total Rewards Philosophy
- Making Pay Decisions (Managers Only)
- eMoney's Pay Programs



ONLINE COURSE

Compensation Training For Managers

This course will provide an overview of eMoney's total rewards

PX0033

★★★★★ (12) ❤️



ONLINE COURSE

Employee Compensation Training 101

This course will provide an overview of eMoney's total rewards

PX0038

★★★★★ (26) ❤️

Action Planning

Managers will be meeting with their teams to share the results:

- In some instances, results may be available at the team or department level.
- Results may only be available by department or business unit levels.
- We recommend creating action planning committees that include team members
- Be sure to establish a cadence to communicate progress and results
- Add Action Plans to Culture Amp and update progress