

# How Messer Construction Co. Increased Engagement by 1,900% With Their Financial Wellbeing Benefit



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## About Messer

### Messer Believes Financial Wellbeing Is Important to Overall Employee Wellbeing

Messer is a company of builders and champions of craftsmanship. They manage, develop, and perform complex commercial construction and deliver value through quality construction experiences. Their 1,400 employees in five states believe in building better lives for their customers, communities, and each other.

#### Overview

**1,400**  
eligible employees

**5**  
states

**50%**  
of workforce does not  
sit at a desk



One of Messer's core values, Zero Injury, is a key driver behind the HR team's focus on financial wellbeing for their employees. "We believe that financial wellness is a key aspect of overall wellbeing," says Theresa Cappel, HR Director at Messer. "If employees are distracted by things like financial stress, that's a recipe for getting injured on the job."

## Problem

### A Previous Financial Program Wasn't Reaching Employees

Messer isn't new to financial wellbeing programs. They previously offered a program that received little engagement. Reaching the Messer Craftforce—the construction workers at their building sites—was challenging because HR didn't have any direct means of communication to support the 50% of workers who aren't in an office. The previous program was difficult for employees to use, lacked interactive planning tools and educational content, and was limited to scheduling calls with a financial advisor.

#### Messer's *previous* program




-  Was difficult to use
-  Lacked interactive planning tools
-  Was human only
-  Received little engagement

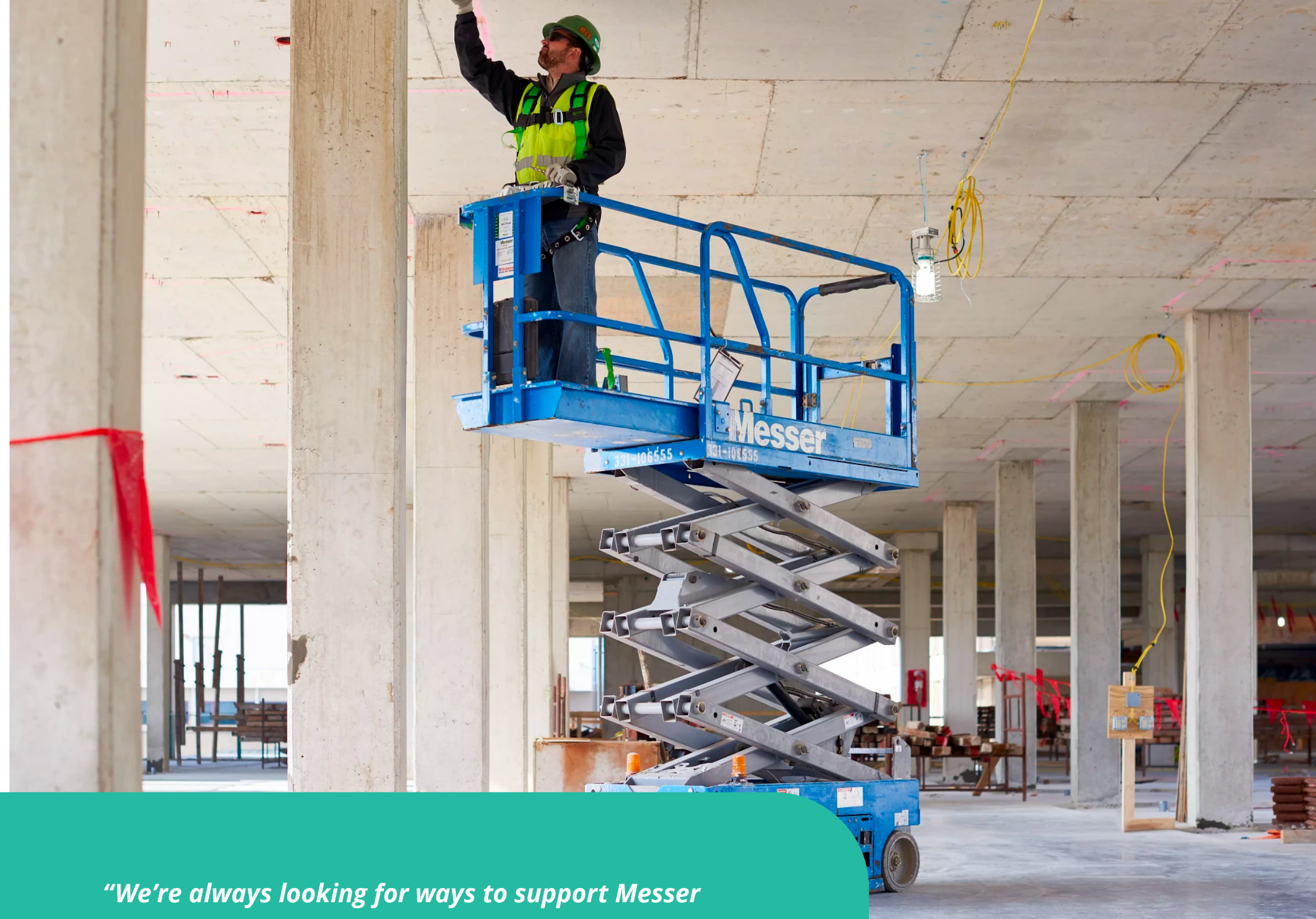


### Reaching Messer's Distributed Workforce Was a Challenge

Another one of Messer's core values is Diversity and Inclusion, and their workforce reflects this value with employees representing a wide variety of backgrounds, ages, and income levels. Each employee is at a different place in their personal financial journey, whether they are just starting out and trying to stabilize their finances, are in the process of buying a home and starting a family, or are getting ready for retirement. Creating a communication strategy to reach all employees, educate them about their benefits, and help them make the right choices about complex subjects like health insurance and employee stock ownership was important to Messer's HR team.

#### The Challenge

-  Creating a communication strategy to reach Messer's workforce was essential
-  It's harder to reach Craftforce employees because they're not typically in an office setting
-  Each employee is at a different place in their financial journey and needs a personalized experience



## Solution

### **New Financial Wellbeing Partnership Extends Messer's HR Team**

Messer partnered with [LearnLux](#) with the goal of offering a financial wellbeing program that would better meet the needs of their workforce. This could save time for the HR team and provide a better experience to employees by relying on LearnLux's Certified Financial Planner™ professionals to talk directly with employees and answer complex and personal financial questions.

#### **Messer chose LearnLux to**

- ✓ Meet the needs of their workforce
- ✓ Offer employees expert financial guidance
- ✓ Save time for the HR team

*"We're always looking for ways to support Messer employees and their families outside of work," said Theresa Cappel, HR Director at Messer. "We don't have any financial experts on our team, and don't want to get into the grey area of giving financial guidance to employees."*



## A Custom Content and Communication Strategy Meets Messer's Unique Needs

Before launching the new program, LearnLux set up a dedicated financial wellbeing portal for Messer employees and created customized lessons to explain Messer's Employee Stock Ownership Plan and Hourly Employee Retirement Plan in simple, jargon-free terms.

Then, LearnLux provided Messer's HR team with customized communications to post on their intranet and Craftforce Facebook page, as well as mail to employees. A key component of the strategy was to host two dedicated webinars for Messer employees. The "Messer Money Masterclass" and "Messer Benefits Big Wins" webinars introduced employees to LearnLux and their dedicated financial advisor in a comfortable and informative way that was easily accessible to employees live or on demand.

### Messer's HR Team Appreciates

- ✓ Turnkey communication toolkits that make it easy to promote the LearnLux program
- ✓ Saving time and liability by directing employee financial questions to a CFP® professional
- ✓ Dedicated, white-glove Customer Success experience

## LearnLux Tools, Lessons and Financial Advisor Calls Provide Options for Employees

With LearnLux, Messer employees can sign up for a mobile-friendly LearnLux account, complete a quick financial checkup, set goals, and get individualized suggestions on recommended lessons and next steps to help them in their financial journeys. The tools are available 24/7 and are designed to be simple and jargon-free. If employees have questions or need more support, they can submit a question through the LearnLux platform, or easily book a free, confidential video call to talk about their situation and receive personalized, professional guidance from an unbiased LearnLux Certified Financial Planner™ professional.

### Messer Employees Appreciate

- ✓ Custom lessons on their workplace's unique benefits
- ✓ Live and on-demand webinars hosted by a CFP® professional
- ✓ A mobile-friendly program where they can access financial guidance 24/7



## Results

### Initial Employee Engagement Outpaced the Previous Program by 1,900%

Employee engagement in the LearnLux program has outpaced the previous program by 1,900%! More than 13% of employees created accounts, attended a webinar, or both in the first six months after launch. Of those who created LearnLux accounts, 67% completed a financial checkup, 28% started a budget, and 25% completed quick lessons focused on their individual needs.



## Impact

# 1,900%

LearnLux program participation outpaced Messer's previous program

# 13%

of employees engaged with the financial wellbeing program

# 67%

of engaged employees completed a financial checkup

# 28%

of engaged employees started a budget

*“We had more participation in the webinar than with our whole previous financial wellbeing program,” said Martina Poet, Messer Benefits Administrator. “Employees who took calls with a financial advisor told us it was a positive experience and definitely worth the time and effort.”*

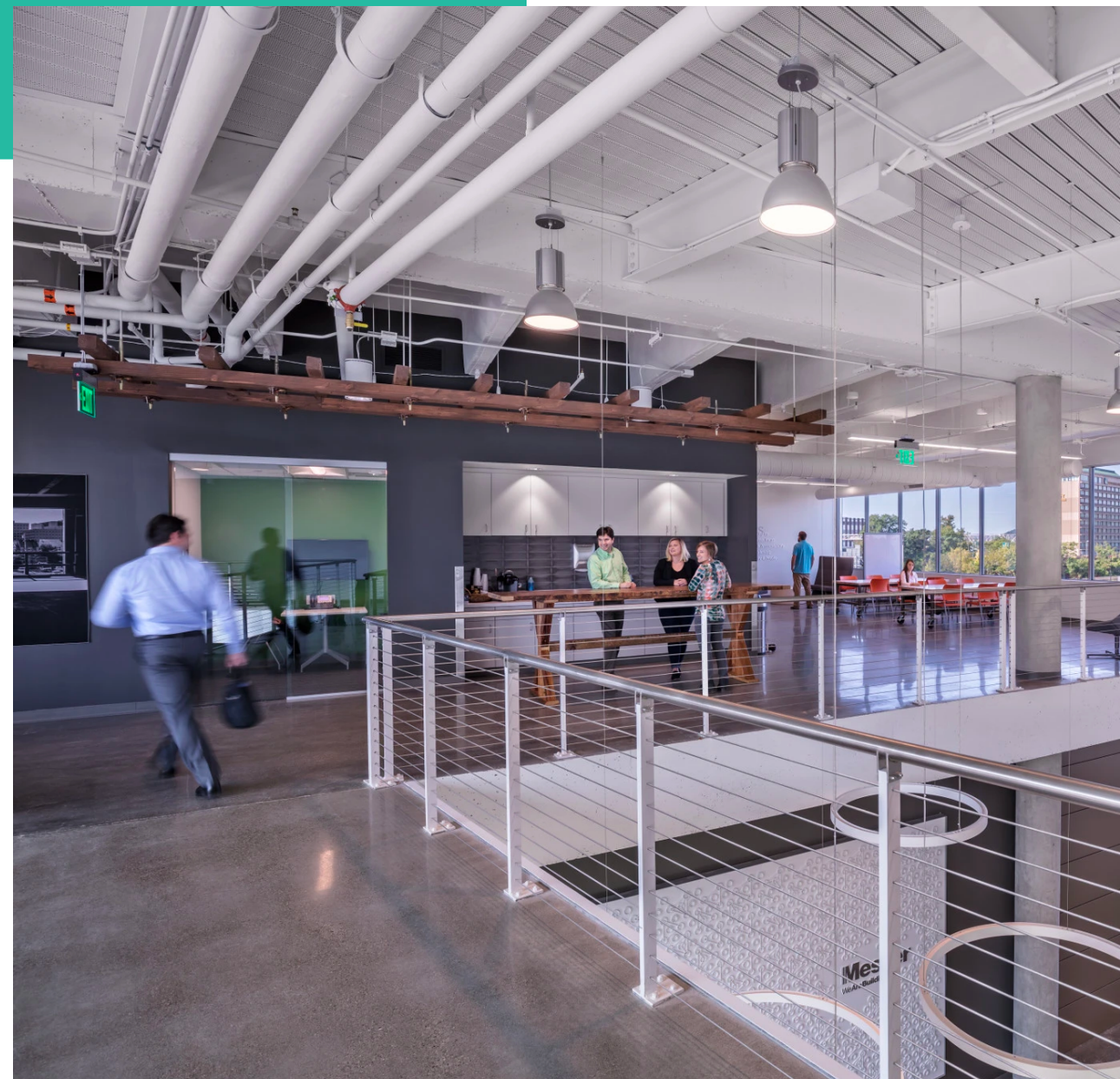
## **Financial Advice Helps Workers With a Wide Range of Questions**

Most people do not have access to professional financial guidance. Financial advisors often set minimum income thresholds or charge high fees. Through LearnLux, unbiased financial advice is now available to every Messer employee—and many have taken advantage of it. Financial advisor meeting topics have ranged from saving for a home, a baby, or a child’s college education to handling tax questions, getting ready for retirement, and deciding when to sell Employee Stock Ownership shares.

### **LearnLux Meets Messer Employees Where They Are**

Messer achieved their goal of reaching a diverse audience, with all genders, age groups, income levels, and life stages represented among the users.

“Employees aren’t all starting in the same place when it comes to their level of financial confidence and the types of life decisions they’re making,” says Theresa. “LearnLux meets them where they are and guides them forward with a combination of an easy-to-use high-tech platform plus high-touch, personalized advice from professional financial advisors.”



“When I learned that I had access to free calls with a Certified Financial Planner™ professional through Messer, I decided to use the opportunity as a way to check on where I was with my finances, said Omar Cruz, Project Engineer at Messer. “I was always conscious about budgeting, retirement, etc., but hadn’t done a lot of detailed planning.”

“I came to the advisor meeting with questions prepared and research done on my own. During my first session we talked about general savings questions and what would be a good financial target for emergency funds and other savings. On a second call, we talked about IRAs and other retirement options. The advisors were fantastic to work with. They always had great advice, answered my questions effectively, and were honest about expectations. The LearnLux app is easy to use and the advisor calls are a great resource I would highly recommend to friends and colleagues.”



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*Omar Cruz, Project Engineer*



### **LearnLux Data Provides Insights to Focus Messaging and Resources**

As an added benefit to the program, LearnLux provides data-based insights to help the Messer HR team determine where to focus their resources and messaging. The most common recommendations for employees are creating a budget, putting estate plans in place, and increasing emergency savings. These topics could suggest future programs or benefits offerings designed to help employees address these specific needs.

### **LearnLux Supports HR and Employees With Open Enrollment**

LearnLux has also been a great resource for Messer’s HR team and employees during Open Enrollment. LearnLux works with HR to develop communication strategies and educate employees about their benefits. LearnLux Certified Financial Planner™ professionals deliver educational webinars and meet individually with employees to help them choose the right health plan and financial benefits to set themselves up for financial success. Since partnering with LearnLux, the HR team has reported receiving fewer calls during Open Enrollment than ever before.

### **Financial Wellbeing Is Key to Messer’s HR Strategy**

Reaching the Craftforce and directing employees to the LearnLux platform and Certified Financial Planner™ professionals is a key part of the Messer HR team’s strategy. Their new financial wellbeing program helps employees feel supported, understand the value of their benefits, reduce their financial stress, and make the best choices for themselves and their families. All of that, they believe, will contribute to overall employee wellbeing and lead to a safer and more productive workplace.



#### **About LearnLux**

LearnLux helps employers reduce financial stress in the workplace by offering employees a high tech, high touch financial wellbeing program to take control of their financial lives.

#### **Features**



Education



Digital Tools



Expert Advice

#### **Learn More**

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