

PURPOSE:

Use this worksheet to move from a *perceived wellbeing issue* to a *clear, scoped, and measurable initiative* you could realistically implement.

WORKING TITLE OF INITIATIVE:**1. WHAT IS SIGNALING THE NEED FOR A WELLBEING-BASED CHANGE?**

What are you seeing, hearing, or experiencing that suggests something needs to change?

Signals you're noticing (check all that apply):

- Increased stress or burnout conversations
- Absenteeism or sick time trends
- Turnover or retention concerns
- Engagement or pulse survey themes
- Safety incidents or near-misses
- Sustained workload or overtime
- Team conflict or morale issues
- Healthcare or benefits trends (aggregate)
- Other: _____

What is happening? (Describe the signal clearly.)

Who is most impacted? (roles, teams, locations — not individuals)

2. WHAT IS THE CHANGE YOU WANT TO INITIATE?

Describe the change as a shift from today to a better future state.

From (current state):

To (desired future state):

Primary wellbeing focus (check one):

- Connection & belonging
- Work / life balance
- Retention & engagement
- Health & wellness supports

What would feel different for employees day-to-day?

3. WHO ARE THE CHAMPIONS AND STAKEHOLDERS?

Wellbeing initiatives succeed when ownership and influence are clear.

Executive sponsor (decision authority):

Implementation owner (does the work):

Frontline champion(s) (trusted influencers):

Key stakeholders (teams/functions impacted):

Likely skeptic or blocker (and why):

IDEA STARTERS

Use as inspiration — not a checklist

WORK / LIFE BALANCE

- Flexible start & end times
- Hybrid or remote adjustments
- Meeting-free focus time
- Clear after-hours norms

CONNECTION & BELONGING

- Peer check-ins or buddy systems
- Team rituals (wins, gratitude)
- Strong onboarding or re-onboarding
- Cross-team communities

MENTAL HEALTH & SUPPORT

- Normalize EAP use (aggregate only)
- Manager support training
- Wellbeing or recovery days
- Clear paths to ask for help

PHYSICAL & ENVIRONMENTAL

- Ergonomic reviews
- Wellness or reflection spaces
- Movement or stretch breaks
- Safety or comfort fixes

FINANCIAL & LIFE WELLBEING

- Financial literacy sessions
- Benefits education
- Support during life transitions

LOW-COST, HIGH-IMPACT STARTS

- Pilot with one team
- Change time before spending money
- Listen first, then design
- Small experiments with stop/go points

4. WHAT DATA DO YOU ALREADY HAVE?

List existing information that helps explain the problem or opportunity.

Current data or inputs (quantitative or qualitative):

What does this data suggest? (key insight or pattern)

5. WHERE CAN YOU GET ADDITIONAL DATA?

Think about realistic, privacy-safe ways to strengthen your case.

Potential data sources (check all that apply):

- Engagement or pulse survey themes
- Exit interview trends (aggregate)
- PTO / absence trends
- EAP utilization (aggregate only)
- Workload or scheduling data
- Safety or incident trends
- Listening sessions or focus groups
- Manager observations
- Other: _____

Most important data to add — and why:

6. HOW COMPLEX IS THIS INITIATIVE?

Circle one and explain.

NOT COMPLEX | SIMPLE | VERY COMPLEX

Why did you choose this level of complexity?

Dependencies or constraints (budget, policy, systems, timing):

7. WHAT IS THE ORGANIZATIONAL BENEFIT?

Why should the organization care?

Primary organizational benefit(s):

- Improved retention
- Reduced burnout risk
- Increased productivity or quality
- Reduced absenteeism
- Improved safety
- Stronger engagement or culture
- Employer brand / recruiting impact
- Other: _____

Explain the benefit in 1–3 sentences:

8. WHAT IS THE INDIVIDUAL EMPLOYEE BENEFIT?

Why would an employee value this change?

Primary employee benefit(s):

- Reduced stress or overload
- Greater flexibility or control
- Improved access to support
- Stronger sense of belonging
- Improved health or energy
- Clearer expectations or boundaries
- Other: _____

Explain the benefit in 1–3 sentences:

9. WHAT WILL THE COST BE?

Estimate at a high level — precision is not required.

Direct financial cost:

- \$0–\$500
- \$500–\$2,000
- \$2,000–\$10,000
- \$10,000+

Notes: _____

Labor cost (time required):

Who + estimated hours: _____

Operational or admin costs:

Opportunity cost (what might be deprioritized?):

10. WHAT WILL THE ROI BE — AND HOW WILL YOU MEASURE IT?

Define success before you start.

Success measures (choose 2–4 total):

Leading indicators (early signals):

- Participation or uptake
- Manager adoption
- Pulse survey improvement
- Use of existing resources (aggregate)
- Other: _____

Lagging indicators (outcomes):

- Retention or turnover trend
- Absence trend
- Engagement score change
- Safety trend
- Productivity or quality metric
- Other: _____

Baseline (today): _____

Target (future): _____

Measurement cadence:

Monthly Quarterly Other: _____

Plain-language ROI statement:

"If we invest _____, we expect _____
by _____."

OPTIONAL: FIRST 30-DAY ACTION

End with momentum, not a document.

First step to take:

Owner: _____ By when: _____

One quick-win communication:

One risk to watch: