

The ROI of Employee Well-being

Tami Simon, JD

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Named one of “The Top 25 Human Capital Consultants and Leaders” and “Most Influential Women in Benefit Advising,” Ms. Simon is a nationally respected human capital, employee benefits and healthcare business executive and attorney. She is an advisor to private equity investors and has held leadership roles with global HR consulting firms including Mercer, Conduent (formerly Xerox), and most recently served as Segal’s Global Corporate Consulting Business Leader. Prior to consulting, Ms. Simon was in private law practice with McDermott, Will & Emery.

Ms. Simon is a popular public speaker and has testified before the U.S. Congress and several Federal Government agencies on workforce and healthcare matters impacting America’s employers. She has been quoted by leading news outlets including the *New York Times*, *Wall Street Journal*, *The Atlantic*, *CFO Magazine*, *Washington Post*, and *Chicago Tribune*. She serves on the Boards of the Employee Benefit Research Institute, American Benefits Council, Emeriti Retirement Health Solutions and the Health Enhancement Research Organization, as well the ERISA Industry Committee’s Advisory Council, an editor of the BNA Tax Management’s Compensation Planning Journal, a member of the American Bar Association, and a Fellow of the elite American College of the Employee Benefits Counsel. Ms. Simon works in Washington, DC.

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The facts

- The almost 222,000 layoffs by US employers through Feb are the worst we’ve seen since 2009
- Employers report that finding and retaining employees eased in 2024 (first year since 2019)
- Workers believe that there are fewer jobs and they are harder to get
- Learning and working conditions remain in the top three CEO priorities, but equality has fallen
- Attracting and retaining talent remains the #1 priority for CEOs for the 5th yr; increasing productivity is #2
- Impaired brain health is costing the global economy as much as \$8.5 trillion a year in lost productivity.
- 3 in 4 employees in US experience burnout at least sometimes; 1 in 4 “very often” or “always”
- Financial insecurity leads 55% of employees being distracted while at work

Investments in economic opportunities and education are high priorities for CEOs

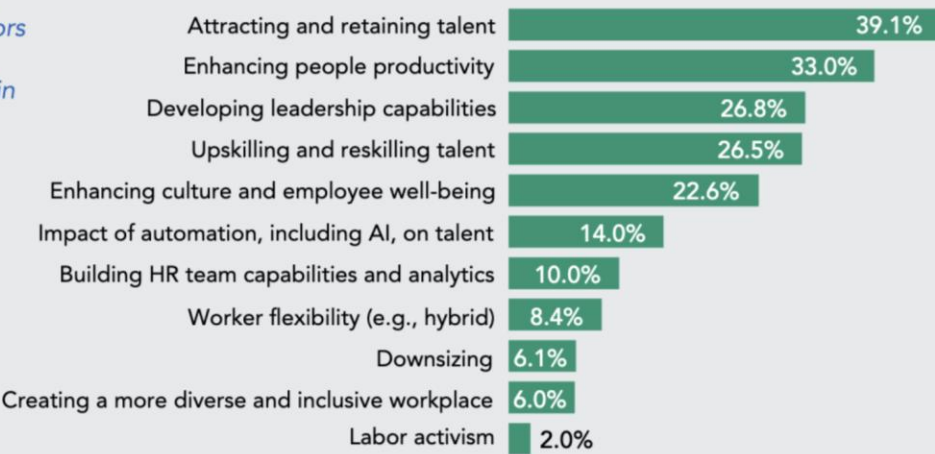
Select the 2 highest social priorities for your organization.



Note: Globally, 488 CEOs responded.
Source: The Conference Board® C-Suite Outlook 2025: Seizing the Future

Having the right talent, in the right place, with the right skills to ensure future growth is a consistent challenge for CEOs

Select the internal factors or issues that your company will focus on in 2025: Human capital. (Select 2)



Note: Globally, 508 CEOs responded.
Source: The Conference Board® C-Suite Outlook 2025: Seizing the Future

Holistic workforce well-being



Holistic Well-Being

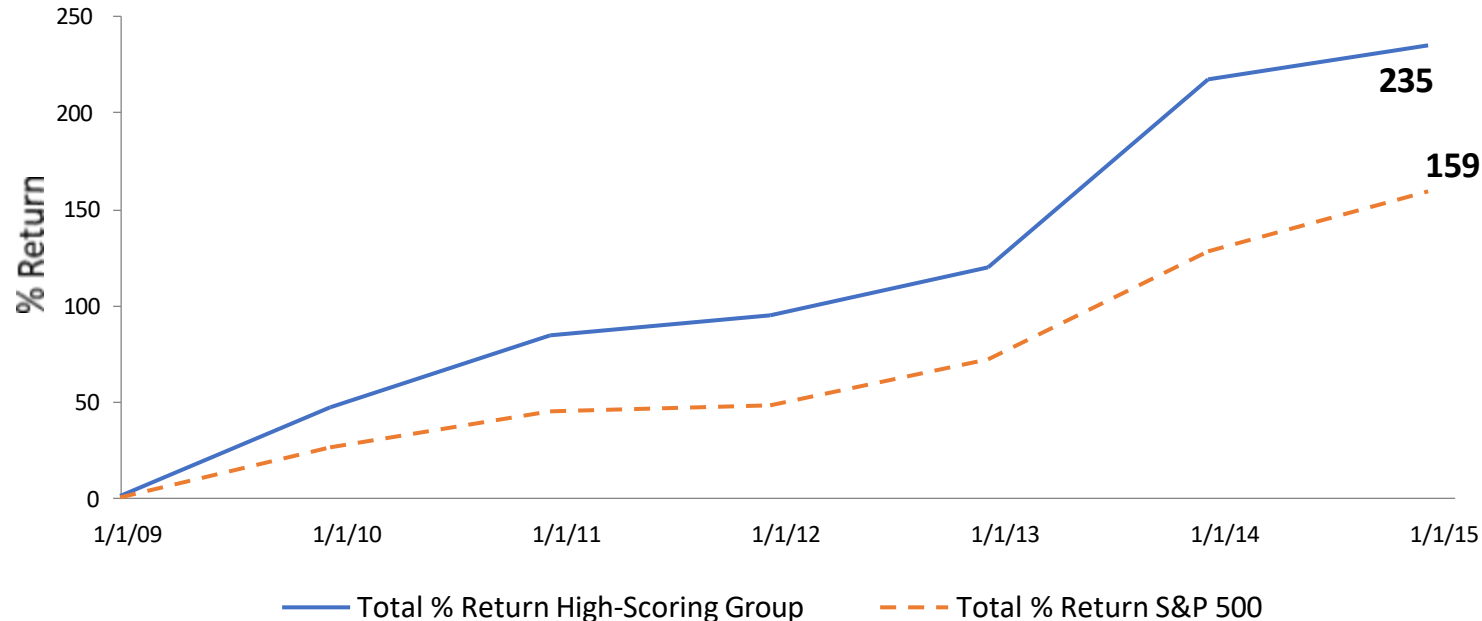
- An integrated view of an individual's health and security, which includes physical, mental, financial, occupational, environmental and social well-being.



US approach to workforce well-being is a three-legged stool



The proof is in the pudding



Source: Grossmeier J et al. Linking workplace health promotion best practices and organizational performance. Journal of Occupational and Environmental Medicine. January 2016.

Good results for business: Employers who invest in holistic well-being appreciate 235% compared to 159% for the S&P 500



Good deal for America:

For every \$1 of forgone tax revenue, employers paid:

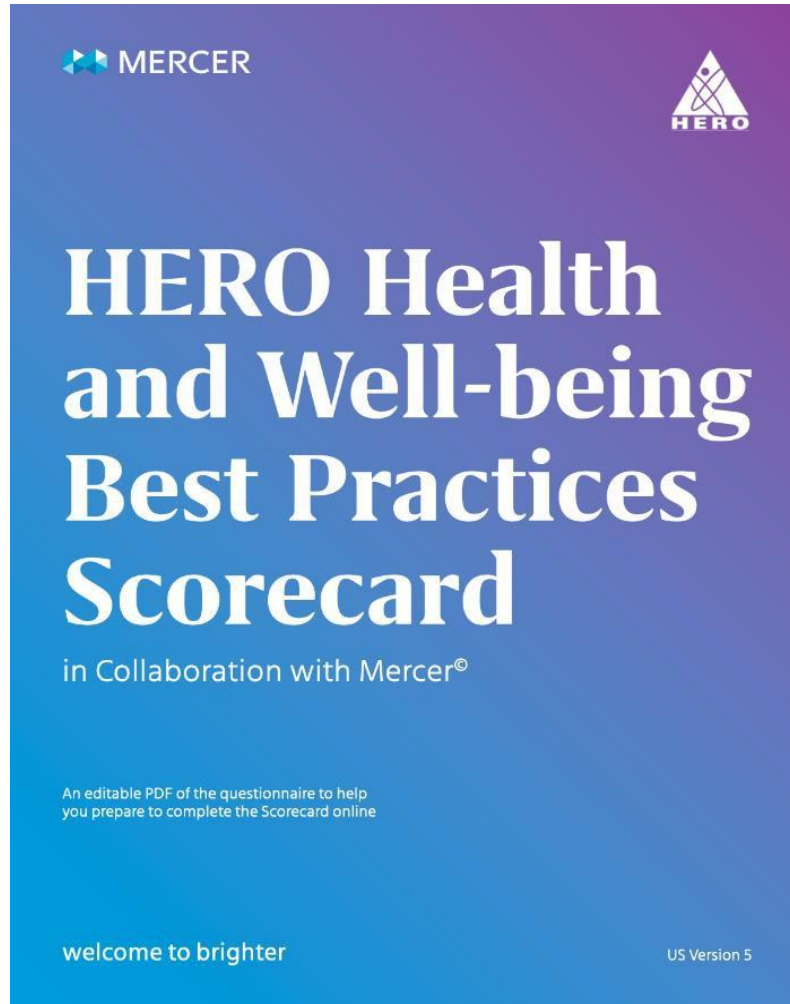
- \$9.31 in retirement benefits
- \$5.36 in health benefits



Smart investment for employers:

For every \$1 invested in mental health support, \$4 is returned in increased productivity

Free resource: Health Enhancement Research Org (HERO) Health & Well-being Best Practices Scorecard



- Free online survey tool
- US and International versions
- Instantaneous report
- Compare results against the national averages
- Over 3,000 companies have taken the Scorecard since 2006
- Access link:
<https://hero-health.org/hero-scorecard/>