Engaging Gen Z

Workplace savings plan self-assessment

Looking closely at the participation rates and contribution behaviours of Gen Zs (born between 1997 and 2012), along with how effective your communications are with this group, can help you find opportunities to improve how engaged they are with their workplace retirement and savings plan.

Let's assess your current communications, engagement strategy and plan experience.

For each statement, answer: Yes, Partially, or No

Understanding your workforce

Yes	Partially	No	
☐	☐	☐	We track Gen Z participation rates.
☐	☐	☐	We understand Gen Z attitudes and concerns.
☐	☐	☐	We gather employee feedback regularly.
☐	☐	☐	We measure engagement separately by age group.

Communicating with Gen Z

Yes	Partially	No	
●	☐	☐	Our messaging acknowledges real-world challenges.
☐	●	☐	We avoid generic retirement-only messaging.
☐	☐	☐	Every communication contains a clear next step.
☐	☐	☐	Messages are concise and easy to scan.

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Making savings relevant

Yes	Partially	No	
☐	☐	☐	We explain how savings can support flexibility.
☐	☐	☐	We communicate clearly how we match their contributions.
☐	☐	☐	We connect savings to real-life outcomes.
☐	☐	☐	We show the value of taking small actions.

Designing your plan experience

Yes	Partially	No	
☐	☐	☐	Enrolment is simple and digital.
☐	☐	☐	Employees receive timely reminders.
☐	☐	☐	Employees can easily access guidance and support.
☐	☐	☐	We use behavioural nudges at key moments.

Interpreting your results

No matter your results, the fact that you're thinking about this and working to find solutions means you're ahead of most organizations. Here are the parts of the toolkit that will help you based on your results.

If most answers are Yes

→ Focus on testing and optimization.

If most answers are Partially

→ Focus on communications and moments that matter.

If most answers are No

→ Start with enrolment, communications and contribution behaviours.

Where should you start?

Try using your assessment results to focus your efforts.

- You don't need to improve everything at once.
- Start with 1 communication, 1 employee moment or 1 engagement challenge.

Explore our toolkit to learn more about how to identify the highest-impact opportunities.

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