Workplace wellbeing strategy canvas

## Overview

Employee wellbeing isn't a one-off initiative - it’s a long-term business strategy. But too often, workplace wellbeing efforts are reactive, fragmented, or disconnected from what employees actually need.

The Workplace Wellbeing Strategy Canvas is a practical tool to help HR, People, and leadership teams build a wellbeing strategy that is structured, scalable, and meaningful.

It brings together the key elements of a high-impact approach - from defining your vision and pillars to setting measurable goals, understanding employee needs, and embedding accountability.

This canvas is designed to:

* Align wellbeing efforts with your business goals and values
* Identify the most relevant areas of focus for your organization
* Turn insight into clear, actionable initiatives
* Build trust and engagement through transparency and follow-through
* Prevent burnout, boost performance, and create a workplace where people thrive

Use it to:

* Co-create strategy in leadership offsites or workshops
* Audit and refresh existing wellbeing efforts
* Launch a new wellbeing program with clarity and momentum
* Anchor team discussions in data, purpose, and employee voice

## 1. Vision and purpose

Set the foundation for the entire strategy. This section defines *why* wellbeing matters to your business - beyond perks and programs - and links it to culture, performance, and retention.

Deliverable example:

"Our vision is to foster a workplace where wellbeing is embedded in daily decisions - not bolted on - with a focus on long-term sustainability, psychological safety, and inclusive practices."

Steps to complete:

1. Ask leadership: "Why do we want to invest in wellbeing now?"
2. Review company values, mission, and engagement trends.
3. Draft a short purpose statement aligned to your business strategy.
4. Refine it with senior leadership input.

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## 2. Wellbeing pillars (areas of focus)

## Define the core dimensions of wellbeing that your strategy will support. These become your structure for goals, measurement, and actions.

Deliverable example:

Pillars: **1)** Mental health, **2)** Sustainable workload, **3)** Social connection, **4)** Inclusive flexibility

Steps to complete:

1. Review existing wellbeing efforts and identify gaps.
2. Review employee feedback and segment themes.
3. Use a whiteboard or canvas tool to cluster needs into categories.
4. Narrow down to 3–5 key pillars.

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## 3. Target outcomes and metrics

Make the strategy measurable and accountable. For each pillar, define what success looks like and how you'll track progress.

Deliverable example:

| **Pillar** | **Outcome** | **Leading metric** | **Lagging metric** |
| --- | --- | --- | --- |
| Mental health | Employees feel safe talking about mental health | % of managers trained | % of mental health-related issues resolved by manager vs issues escalated to HR |
| Social connection | Employees feel more connected to peers and teams | % participation in team rituals or events | Engagement survey score on connection/trust |
| Workload & pace | Workload is evenly distributed and sustainable across teams | Workload vs burnout score |  |
| Growth and purpose | Employees feel their work contributes to something meaningful | % who say their goals are clear and aligned | % of role progressions on a yearly basis |

Steps to complete:

1. Define 1–2 outcomes per pillar.
2. Choose leading metrics (short-term inputs).
3. Choose lagging metrics (long-term outcomes).
4. Set baselines using internal data.

## 4. Employee needs and input

Make sure your strategy is grounded in real employee feedback - not assumptions or generic ideas.

Deliverable example:

"Only 34% of employees feel their workload is manageable. Feedback from exit interviews highlights manager support as a key gap."

Steps to complete:

1. Review data: surveys, exit interviews, pulse checks.
2. Conduct quick employee interviews or focus groups.
3. Summarize top 3–5 needs or patterns.
4. Validate with 1–2 employee groups or ERGs.

## 5. Key initiatives

Turn strategy into action by listing specific, tangible programs or actions that directly address your pillars.

Deliverable example:

* Train 100% of managers in mental health conversations
* Implement quarterly team capacity planning
* Launch peer support program

Steps to complete:

1. For each pillar, brainstorm 2–3 initiatives.
2. Prioritize by effort vs. impact.
3. Assign owners to each one.
4. Document them in a shared roadmap.

## 6. Ownership and accountability

Clarify who is responsible for delivery and how progress will be governed, tracked, and reviewed.

Deliverable example:

"People Team owns delivery. Monthly check-ins with SLT. Managers report on team wellbeing quarterly."

Steps to complete:

1. Assign an owner for the overall strategy.
2. Assign initiative owners.
3. Define your review rhythm (monthly, quarterly).
4. Agree how updates will be shared (e.g. via dashboards, reports).

## 7. Communication and engagement plan

Ensure people know what’s happening, how it affects them, and how they can get involved. Engagement is as important as execution.

Deliverable example:

"Launch plan includes manager cascade, Slack campaign, and wellbeing newsletter. Two-way feedback forms linked in every post."

Steps to complete:

1. Map your stakeholders (employees, managers, leadership).
2. Draft key messages for each group.
3. Choose channels (email, Slack, events).
4. Plan a launch and follow-up cadence.

## 8. Barriers and risks

Anticipate blockers before they derail your work. Create a proactive plan to mitigate cultural, operational, or resourcing risks.

***NB:*** *If you have a small or time-poor people team, consider relying on/investing in tools and more training for managers to survey and action these themselves.*

Deliverable example:

| **Risk** | **Likely impact** | **Mitigation strategy** |
| --- | --- | --- |
| Manager skepticism | Low adoption | Train in business case for wellbeing |
| Lack of exec sponsorship | No funding or prioritization | Brief leaders with data on ROI and employee expectations |
| Low participation in wellbeing initiatives | Missed outcomes, perception of failure | Involve employees in co-creation; align initiatives with real needs |
| Wellbeing seen as "soft" or "extra" | Cultural resistance, low adoption | Connect to business outcomes like retention, productivity |

Steps to complete:

1. Brainstorm with cross-functional team.
2. Identify cultural, resource, and timing risks.
3. Document mitigation plans.
4. Assign a point person for each key risk.

## 9. Next steps and launch actions

Convert strategy into execution by clearly defining what needs to happen next and who’s responsible.

Deliverable example:

| **Action** | **Owner** | **Due date** | **Notes** |
| --- | --- | --- | --- |
| Finalize canvas and circulate | People lead | May 12 | SLT sign-off needed |
| Launch wellbeing check-in survey | Ops partner | May 19 | Pulse + free-text |
| Create wellbeing strategy slide deck for SLT | People lead | July 5 | Include business case + pilot plans |
| Build and test capacity planning worksheet | Ops partner | July 15 | Use in Q3 planning cycle |
| Launch first manager training pilot session | L&D lead | August 1 | Focus: supportive 1:1 conversations |

Steps to complete:

1. Review all previous sections.
2. Define short-term (30-day) launch actions.
3. Assign owners and deadlines.
4. Review progress weekly or bi-weekly.