

Quick read

# How to talk your CFO's language



Strategy series



# Turning wellbeing into a strategic business lever

HR leaders often see health & wellbeing as a necessity for company culture, while CFOs see it as a line-item expense. To secure long-term investment, you need to talk their language and show ROI.



Here are 4 strategic ways to shift your “program costs” to “financial performance”



# 01

## Lead with outcomes, not activities

CFOs think in **risk, return, and resilience** – not initiatives. If your reporting focuses on “participation”, you’re missing the financial narrative CFOs are looking for.

### Reframe the narrative:

**The HR view:** “We launched new wellbeing initiatives”

**The CFO view:** “We launched a wellbeing initiative that reduced risk exposure, and strengthened long-term cost control”



*“If you’re not familiarizing yourself with the nuances of healthcare spend – and looking at every lever available to optimize outcomes – you’re likely to fall behind.”*

**Scott Charles, Chief Financial Officer,  
Personify Health**



# Use account insights to prove ROI

Credibility is built on **data, not assumptions**. Use your Personify Health account-level insights to provide a forward-looking view of the workforce. CFOs want to know future impact and a recap on past savings.

## What to highlight in your next review:

- ✔ Engagement across highest cost-driving populations
- ✔ Directional movement in risk indicators
- ✔ Early signs of avoided cost and volatility



03

# Measure impact against intention – not spend

**Budget utilization is a vanity metric. To prove value, you must anchor outcomes back to original intent, such as:**

- ✔ Prevention and early intervention
- ✔ Workforce resilience and productivity
- ✔ Reduced exposure to high-cost claims



**Success is impact delivered — not money deployed.**



# 04

## Frame wellbeing as risk management

CFOs constantly trade off priorities. When you position wellbeing as a “benefit” or “nice-to-have”, it becomes negotiable. Position it as “risk management” and it becomes a strategic priority.

### Position wellbeing as:

- ✔ Reducing future financial surprises
- ✔ Improving predictability of healthcare costs
- ✔ Protecting both people and P&L



# Two simple steps to elevate your CFO conversations

- ✔ Link one wellbeing metric to a **business outcome** (risk, cost, productivity)
- ✔ Create a budget slide with **one insight and one financial implication**



## Bottom line

When wellbeing sounds like a **finance conversation**, it earns **finance backing**. Now is the time to use your Personify Health account-level data and dedicated account team to protect your health & wellbeing strategy.