

From 3% to 27%: How FactSet Rebuilt Mental Health Engagement Across 19 Countries



Industry:
Fintech

Company Size:
12,800
employees

Global Reach:
Operating in offices across 19
countries on 5 continents

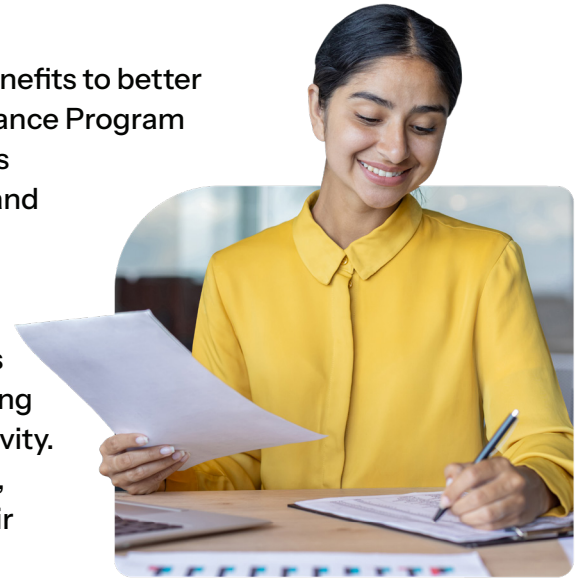
As a leading B2B technology company operating globally, FactSet is dedicated to innovative and long-term client success. The company's focus on exceptional service and connection doesn't end with their clients. FactSet also emphasizes connection for employees and providing benefits that help them prioritize their wellbeing no matter where they are in their lives.

"Our employee population is very global and very diverse, with a considerable percentage of early career professionals. When our employees are looking for mental health resources, they want something they can connect to—even seeing someone that you can relate to makes a difference. Journey provides that. There's something for everyone."

Kristen Steinway, Lead Benefits Specialist & Global Wellbeing Lead

The Challenge: Uniform Benefits for a Diverse, Global Team

FactSet recognized an opportunity to enhance their mental health benefits to better support their global workforce. While their previous Employee Assistance Program (EAP) met basic needs, shifting workforce demands highlighted areas for improvement, particularly around global accessibility, inclusivity, and awareness. With 80% of employees based outside the United States, FactSet sought to move beyond a one-size-fits-all approach, aiming for resources that reflected the unique backgrounds and needs of their 12,800 employees across 19 countries. FactSet’s HR and benefits leaders set out to find a partner that could help them deliver a wellbeing solution tailored to local contexts, yet consistent in quality and inclusivity. They looked for a collaborator with expertise in developing adaptable, flexible programming that would engage employees and support their wellbeing in ways meaningful to each individual.



Addressing Gaps with Adaptable, Globally Consistent Support

As part of FactSet’s proactive amplification of offerings, in 2024, FactSet partnered with Journey to bring additional, specialized mental health resources to every corner of the global workforce. Today, this partnership empowers FactSet to provide inclusive, innovative support for all employees, regardless of location or demographic. The transition has also increased awareness of mental health benefits and delivered high-quality resources, which have allowed FactSet to demonstrate its commitment to fostering a culture that values innovation, agility, and wellbeing throughout its global community.

“FactSet is deeply committed to fostering an inclusive culture, which rests on every employee—regardless of identity or location—feeling valued, supported, and empowered to thrive,” said Desiree Dancy, FactSet’s Chief Inclusion & Belonging Officer and Head of Corporate Responsibility. *“Providing access to globally consistent mental health support enables that culture and strengthens belonging and wellbeing for everyone.”*

FactSet leadership partnered with Journey as the company’s EAP provider in part for its single global platform serving over 190 countries in more than 100 languages, along with data-driven support, content covering a wide range of life stages and experiences, the ability to share the platform with loved ones, and a diverse, responsive vendor.

2x

increase in awareness of EAP vs. previous provider

27%

engagement with preventive mental health benefits among FactSetters

5%

clinical engagement with Journey Proactive EAP in the Americas and EMEA

Trusted Partnership with Dynamic Day-to-Day Collaboration



From the outset, FactSet and Journey teams have engaged deeply, soliciting detailed feedback from employees to ensure the platform reflected how FactSet employees actually engage with support. Journey's system is designed to evolve based on real-world usage and client insight, and FactSet's input helped accelerate that value.

"The collaboration with Journey has been great from the beginning," said Kristen Steinway, Lead Benefits Specialist and Global Wellbeing Lead. "We ask a lot of questions and give really specific feedback. Journey has listened to every concern we've shared—and not just listened, but also acted. There's always a conversation around what we can do to address the feedback and how we can do it. ***That level of responsiveness is unmatched by any other vendor I've ever worked with.***"

For example, based on early engagement patterns and feedback, Journey expanded the platform's content discovery experience by introducing a dedicated "Topics" section, making it easier for employees to explore a broader range of relevant themes.

Similarly, feedback around Journey's in-the-moment support sessions, Talk It Out, informed refinements to the experience, ensuring sessions felt immediately supportive rather than administrative. Today, Talk It Out is one of FactSetters' most valued benefits. ***"Even people outside of FactSet—family members and other loved ones—are using those sessions, which shows how far the impact extends beyond our employee population,"*** Kristen shared.

Iterating for Global Reach and Local Impact



FactSet’s partnership with Journey covers all 19 countries where FactSet has employees, but it’s not a one-size-fits-all approach to reach people in each one. The mental health support needs differ greatly between regions, so Journey worked with FactSet to create an approach that could match local contexts.

That approach included:

- Delivering culturally relevant content for every demographic
- Tailoring trainings to regional contexts, languages, and concerns
 - e.g., Trainings on understanding emotional triggers and supporting colleagues through difficult times in Asia and the Pacific, where FactSet has a large employee population and where mental health stigma is common
- Providing a single, accessible platform with human-verified clinician matching and 24/7 navigation support

Creating localized strategies has been one of the most valuable aspects of the collaboration for FactSet.

“The content topics we promote in Europe might not resonate for employees in the Americas. Similarly, the engagement tactics we use in Canada and the U.S. might not work in Asia. ***Having the flexibility with Journey to tailor our strategy to each area has expanded what we’re able to do and the people we’re able to reach,***” said Kristen Steinway, Lead Benefits Specialist and Global Wellbeing Lead.

The results in each region prove this approach is working:

- **Canada and the United States (Americas):** Excellent preventive engagement (28%) and clinical engagement (5.19%)
- **Asia, Pacific, India, and the Philippines (APAC):** Excellent preventive engagement (26%)
- **Europe, the Middle East, and Africa (EMEA):** Excellent clinical engagement (5.04%)

“Journey’s proactive model allows FactSet to address wellbeing early and meet employees where they are. From my perspective, it raises mental health awareness, reduces stigma, and integrates support throughout the employee lifecycle. This can not only improve engagement and mental health outcomes, but help cultivate a more supportive company culture compared to traditional, utilization-based EAP models.”

Desiree Dancy, Chief Inclusion & Belonging Officer, Head of Corporate Responsibility

Deep Support for FactSet Wellbeing Champions and BRGs

This year uncovered a powerful force for mental health awareness within FactSet: the company’s Wellbeing Champions, a selected group of over 30 employees who applied to be wellbeing ambassadors within the organization.

In 2025, Journey partnered with FactSet’s Wellbeing Champions to equip them with playbooks on how to leverage Journey’s preventive mental health resources as well as resources to empower leaders and managers in talking about mental health and exemplifying practices to support it.

In 2026, the Wellbeing Champions will become a core activation engine for broader mental health awareness and engagement at the company. Initiatives will include:

- A company-wide introduction to the Wellbeing Champions
- Quarterly check-ins for all Champions
- Regionally relevant Champion-led campaigns focused on mental health
- Leveraging Journey’s Mental Health Certification Program to support increased psychological safety at FactSet

Beyond the Wellbeing Champions, Journey has also collaborated with FactSet’s employee-led business resource groups (BRGs). These groups support employees in different identity groups and life stages,

such as women, Latinx employees, elder caretakers, and empty-nesters, among many others. FactSet wanted these groups to be able to access relevant content more directly, so Journey personalized the platform so that BRG members saw content recommendations unique to them on their landing pages. For example, a landing page was created for FactSet’s Americas Families BRG’s Elder Care Village, which immediately impacted over 30 employees.

Journey also helped each group leverage specific content and webinars during pertinent periods. For example, for Veterans Day in the U.S., Journey organized a webinar with the Veterans BRG about emotional triggers for veterans. And after a conversation in the Families BRG about a member’s cancer diagnosis, they promoted a webinar on helping coworkers through a difficult situation.



“When you’re stressed out, you don’t have the time or energy to search for the resources you need. Giving employees the exact link, webinar, or video is important in those moments, and Journey has provided that capability for our BRGs.”

Kristen Steinway, Lead Benefits Specialist & Global Wellbeing Lead

Customized Solutions Create Strong Results



Traditional EAPs see only 2–3% employee engagement on average, often due to limited accessibility, outdated platforms, and non-inclusive resources. In just nine months since FactSet’s implementation of Journey, looking across all global regions, the company reported a **27% engagement with Journey’s preventive mental health material**, including the self-guided online content, daily mental health check-ins, monthly assessments, and live group coaching classes and workshops. This level of engagement enables earlier intervention, reducing downstream healthcare costs and minimizing disruption to workforce productivity.

Clinical engagement also rose significantly in two regions—to 5.19% among employees in the United States and Canada and to 5.04% in Europe, the Middle East, and Africa (EMEA).

The driving factor behind all engagement is having awareness of the benefits to begin with. In this measure, too, Journey facilitated substantial growth. Since February 2025, **Journey more than doubled EAP awareness among FactSetters**, achieving 29% awareness by November 2025.

These results have material downstream effects. **“Taking a proactive, rather than reactive, approach to mental health allows us to help prevent issues from arising or escalating, which can further influence important outcomes such as reducing absenteeism, enhancing engagement, improving retention, and attracting top talent,”** said Desiree Dancy, Chief Inclusion & Belonging Officer and Head of Corporate Responsibility.

Building a Global Wellbeing Engine

With a successful, reciprocal partnership established over the course of Year 1, FactSet and Journey are planning for even more communication, education, and activation in the year ahead. They want to specifically focus on APAC, where benefit utilization lags behind other regions.

To support this next phase, Journey and FactSet plan to focus on:

- Reintroducing Journey to its teams with fresh campaigns
- Equipping Wellbeing Champions with updated playbooks and quarterly check-ins
- Deepening regional training and engagement through multilingual workshops and localized content (e.g., on APAC burnout, global psychological safety, neurodiversity education, etc.)
- Continuing to strengthen collaborations with FactSet’s BRGs and Family Villages
- Broadening inclusion-aligned programming (e.g., aligned with Black History Month, Pride Month, Men’s Mental Health, etc.)



Each of these initiatives will support their ongoing goal of creating a repeatable, measurable, global wellbeing engine that can strengthen FactSet’s culture of mental health, improve resilience across its workforce, and bolster support for teams.

“It’s super important to us to keep the momentum going, especially with our global and regional programming. We consistently ask, ‘What could we do better?’ With Journey, we have a partner who always brings new ideas to the table. Because of it, we’ve seen great progress, and I think we’ll continue to see that.”

Kristen Steinway, Lead Benefits Specialist & Global Wellbeing Lead