

# The Path is Always Greener

GreenPath's progressive financial wellness program and workplace culture create a unique space in which clients and employees can pursue their dreams.



From left to right: **Donna McNeill**, Chief Operating Officer; **Danielle Crane**, Chief Talent Officer; **Sireesha Mandava**, Chief Information Officer and VP of Innovation; **Kristen Holt**, Chief Executive Officer; and **Donna Doleman Dickerson**, Chief Marketing Officer

**“Y**ou’re not alone, it’s not your fault, and everything’s going to be OK.”

That’s the first message GreenPath Financial Wellness wants potential clients to receive. Because, with 78 percent of American households living paycheck to paycheck, most people have money problems—and GreenPath is one of the nation’s leading nonprofits to turn to for help.

“Most people are stressed on their first call,” explains Chief Operating Officer Donna McNeill. “They’ve usually already put off calling for too long.” That’s why the GreenPath experience begins with listening. From the first call, a counselor—who has received training in active listening—takes in each person’s unique story.

“Instead of assuming we know what’s best for them, we listen to their challenges, fears, and goals and design a plan tailored just for them,” says Chief Executive Officer Kristen Holt. “It’s part of our ‘human-centered design’ model. It means we go deeper with each client to understand them better.”

That’s important because among GreenPath’s 200,000 clients annually, goals vary widely and include paying down debt, buying a home, preventing foreclosure, and saving for retirement.

“This is why one of our key messages is ‘know your numbers,’” says Chief Marketing

Officer Donna Doleman Dickerson. “If you have a credit card, know the interest rate. Regularly check your credit score. This is how you become empowered. The more you know, the more you can plan for your desired financial future.”

GreenPath provides clients, employees, and partners—including its credit union and bank partners—with easy-to-use tools designed and created by the talented innovation and IT staff, led by Chief Information Officer and VP of Innovation Sireesha Mandava. A secure online client portal allows clients to track their progress from anywhere.

“Everything runs on technology,” Mandava says. “My team and I are committed to making it a competitive advantage for GreenPath.”

## CHANGING THE NARRATIVE

Founded in 1961, GreenPath is a rare mix of staying power and 21st-century game-changer. Always open to new ideas, the company recently shifted its brand focus from “debt management” to “financial wellness.”

“Financial wellness is a more holistic approach,” Holt notes. “It makes sense for us because we’re doing more than getting people out of debt—we’re looking at their whole situation to understand them.”

The approach is working; GreenPath’s client surveys show that within six

months, clients feel less stressed, more confident about attaining their goals, and more able to incorporate their new financial habits permanently. GreenPath also offers clients a private online community to share experiences, gain support, and stay motivated.

Because the human-centered design approach is successful with clients, the GreenPath team assimilated it into their internal culture, too. “We realized that we needed to understand our clients’ and our team members’ needs at a deeper level,” says Chief Talent Officer Danielle Crane. Doing so makes a difference: The staff—550 people in all, 67 percent of whom are female, including five of the top seven executives—is happy. In the recent words of one team member, “The relationship I have with GreenPath is the healthiest relationship in my life. Nowhere else do I feel so aligned in my values or like I can really show up as my whole self.”

## A LITTLE MORE ABOUT GREENPATH

**Mission:** To empower people to lead financially healthy lives.

**Vision:** To remix the American Dream so it works for everyone.

**Guiding Principle:** To put people at the center of everything we do.

36500 Corporate Drive, Farmington Hills, MI 48331  
800-550-1961 • [greenpath.org](http://greenpath.org)

 **GreenPath**<sup>™</sup>  
financial wellness

Empowering people to lead financially healthy lives.