

Digital Concierge Case study

Boosting Employee Wellbeing & Productivity at Fidelity with Circles

The challenge:

- In the competitive world of financial markets, attracting and retaining top performers means going beyond traditional perks and compensation. Fidelity (FMR) recognised that employees increasingly expect benefits that are personalised, practical, and genuinely improve their quality of life.
- Standard, one-size-fits-all offerings were no longer enough. Employees wanted support tailored to their unique needs - help that freed up their time, reduced stress, and gave them the flexibility to manage demanding careers alongside personal priorities. FMR set out to find a tailored benefits solution that would resonate with its diverse workforce and position the firm as an employer of choice.

The Circles Solution:

In November 2024, Circles partnered directly with FMR to launch a digital work-life balance program designed around the unique needs of financial services professionals.

Key elements included:

Unlimited Lifestyle Support

Covering life admin, travel planning, and concierge services to help employees reclaim valuable time.

Personalised Digital Platform

A web and mobile experience, available 24/7 and tailored to each employee.

Proactive Engagement

Regular communications encouraging employees to take full advantage of the programme.



The Outcome

A Modern, Tailored Benefits Experience

By implementing Circles, FMR delivered a flexible, high-impact benefit that met employees where they are - improving wellbeing, reducing stress, and strengthening engagement.

This tailored approach positioned FMR as a forward-thinking employer, aligning benefits with the evolving expectations of today's financial services talent.

Average saving of

5 hours per request

High repeat usage

showing strong value and relevance

60%

employee sign-up within the first three months

www.circles.com