



Modern Recognition for Finance: Proven to Boost Engagement & Retention

BRIEF OVERVIEW

Bucketlist is the only recognition and rewards platform purpose-built for **banks, credit unions, and financial institutions** - guaranteed to reduce turnover, boost engagement, and streamline HR administration.

Financial institutions face unique challenges: geographically dispersed branches, high compliance demands, and intense pressure to retain skilled staff. Bucketlist helps unify culture, increase recognition participation, and measurably improve employee morale.

On average, **finance organizations** working with Bucketlist see:



90%+ monthly active participation

in recognition programs



Up to 80% engagement rates

18% above industry benchmarks



3 months to value realization

with cultural impact from day one



"Employee engagement has noticeably improved, with a clear boost in morale. The positive impact is evident in the smiles and optimism when recognition is given."

- Julianne Silletti, VP Human Resources, First Bank

PROBLEM

Every time a bank employee leaves, it costs your institution ~\$58,000 (Gallup) in recruiting, onboarding, and lost productivity.

Burnout, disengagement, and lack of recognition don't just affect morale - they increase compliance risks, turnover, and client satisfaction gaps.



45% report burnout

45% of banking employees report high burnout (Gallup, 2024)



Turnover costs \$30B

Turnover in financial services costs U.S. institutions \$30B annually (PwC)



37% more productivity

Recognized employees are 37% more productive and stay longer (Gallup)

SOLUTION

What if your bankers, advisors, and support staff felt seen, valued, and proud - even in high-pressure environments?

Traditional recognition programs weren't built for regulated, multi-branch financial institutions. Bucketlist empowers leaders to scale recognition across all roles - without adding compliance or admin headaches.

Hundreds of banks and financial institutions use Bucketlist to boost retention and unify culture.

6 Reasons Why Leading Financial Institutions Choose Bucketlist

1

Delivering Results - Guaranteed Impact

Up to 80% engagement - well above industry benchmarks.

2

Built for Finance & Banking

Pre-built compliance awards, banking-specific rewards, and audit-ready reporting.

3

Recognition That Reaches Every Worker

Mobile-first for frontline tellers, advisors, and back-office staff.

4

Largest Rewards Catalogue for a Diverse Workforce

Gift cards, experiences, PTO, professional development, and client-driven rewards.

5

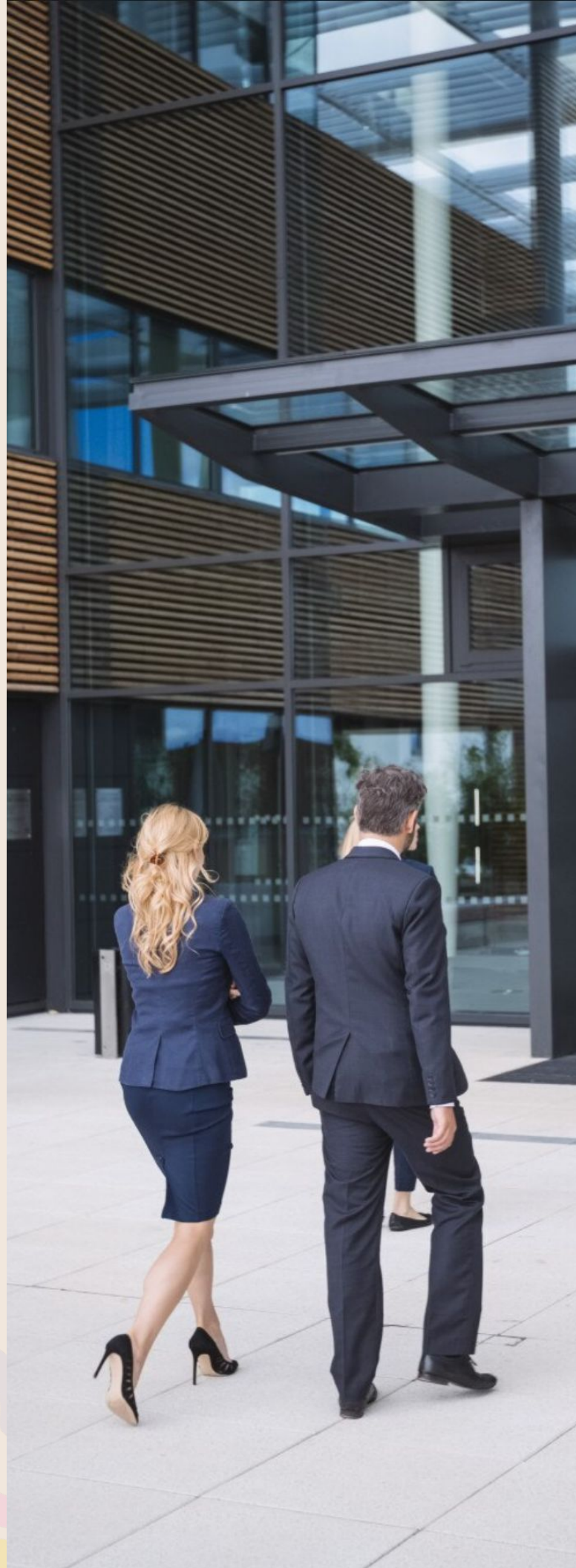
Fully Customizable to Match Your Culture

Aligns with core values like integrity, client service, and compliance excellence.

6

White-Glove Customer Success Managers That Reduces Admin

Dedicated rollout teams; typical onboarding takes just 8–16 hours.





Use Cases

What top **financial institutions** have solved with Bucketlist:



Unifying culture across
multi-branch banks



Automating compliance, tenure,
and performance awards



Boosting frontline morale &
reducing teller turnover



Increasing adoption of core values
in daily work



Successfully Launching a Recognition Program across 26 locations

First Bank

Finance Industry (Banking)



BEFORE

“With multiple branches across several states, we struggled to maintain a unified culture. Recognition was inconsistent, and employees in different locations often felt disconnected.”

AFTER

“Bucketlist created a sense of belonging for all our employees. The platform is straightforward, user-friendly, and brings daily enjoyment to our work. Engagement has noticeably improved, with morale higher across all 26 branches.”

Join thousands of leading brands and millions of employees using Bucketlist everyday





Features

Bucketlist is designed for **finance organizations**.

Recognition Features

- Peer-to-peer & manager shoutouts
- Event-based recognition for **compliance excellence, customer service, and sales goals**
- Awards tied to **core banking values**

Rewards Catalog

- 4,000+ curated rewards
- Popular with finance staff: **PTO, compliance bonuses, Amazon gift cards, financial planning sessions**

Service Awards, Milestones & Onboarding

- Automate new hire welcomes, certifications, anniversaries

Mobile Access

- Mobile-first to engage tellers, advisors, and field staff

Integrations

- HRIS (Workday, ADP), SSO, MS Teams, Slack

External Recognition

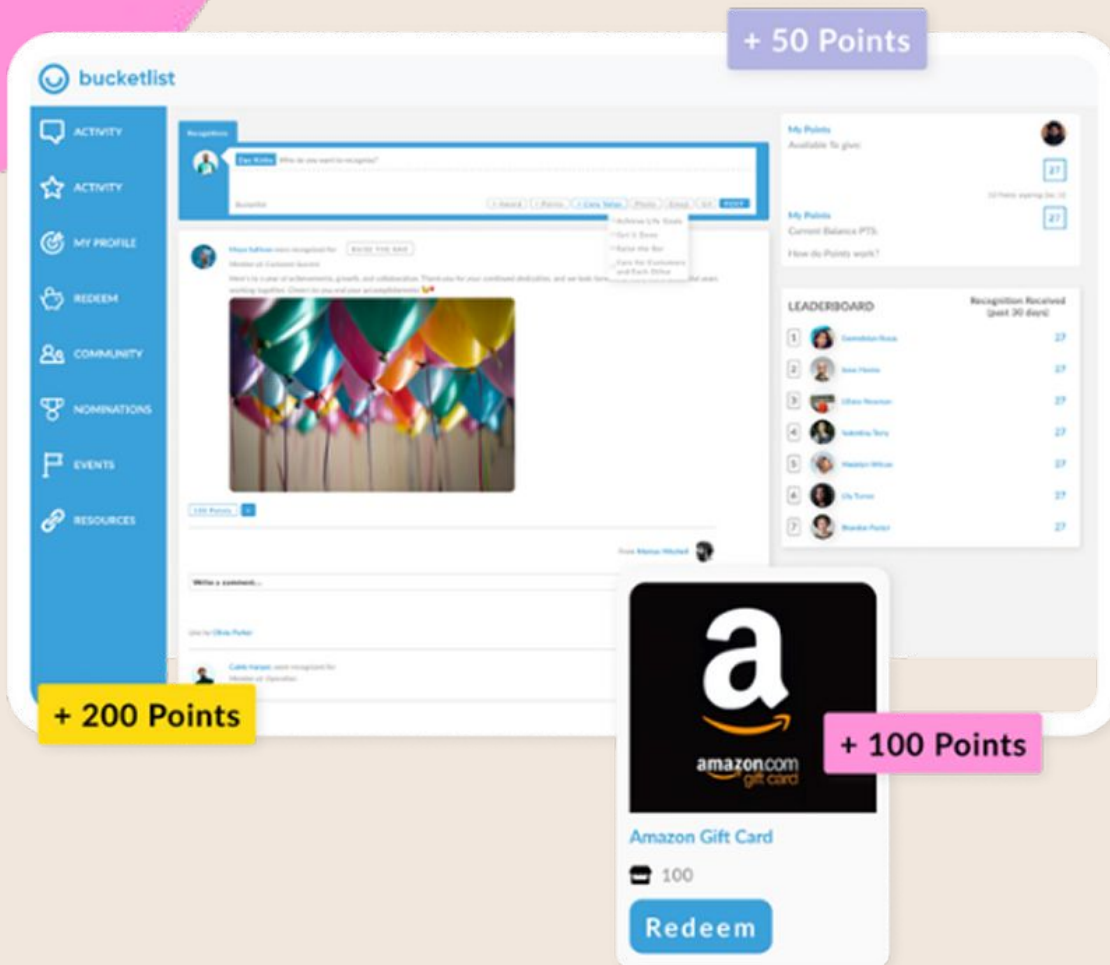
- Client & peer recognition with **QR code capture**

Industry-Leading Support

- 95%+ adoption rate
- Dedicated customer success team

Reporting & Analytics

- Segment by **branch, department, or compliance area**
- Full visibility into engagement, redemptions, and ROI



Guarantee higher engagement across every branch with Bucketlist

[Book a Demo Today](#)

[Proven Results: How First Bank achieved 90%+ program engagement across 26 locations](#)