



# The Volunteering Variety Show



## Key insight

"I've had some great volunteering opportunities over the years. But they always felt largely similar, working in shops, or helping out on a stand at an event.

I'm sure there must be new ways for people like me to help out in this modern era, but I feel like I haven't heard enough about them to know if I could be a good fit for a cause at my age."

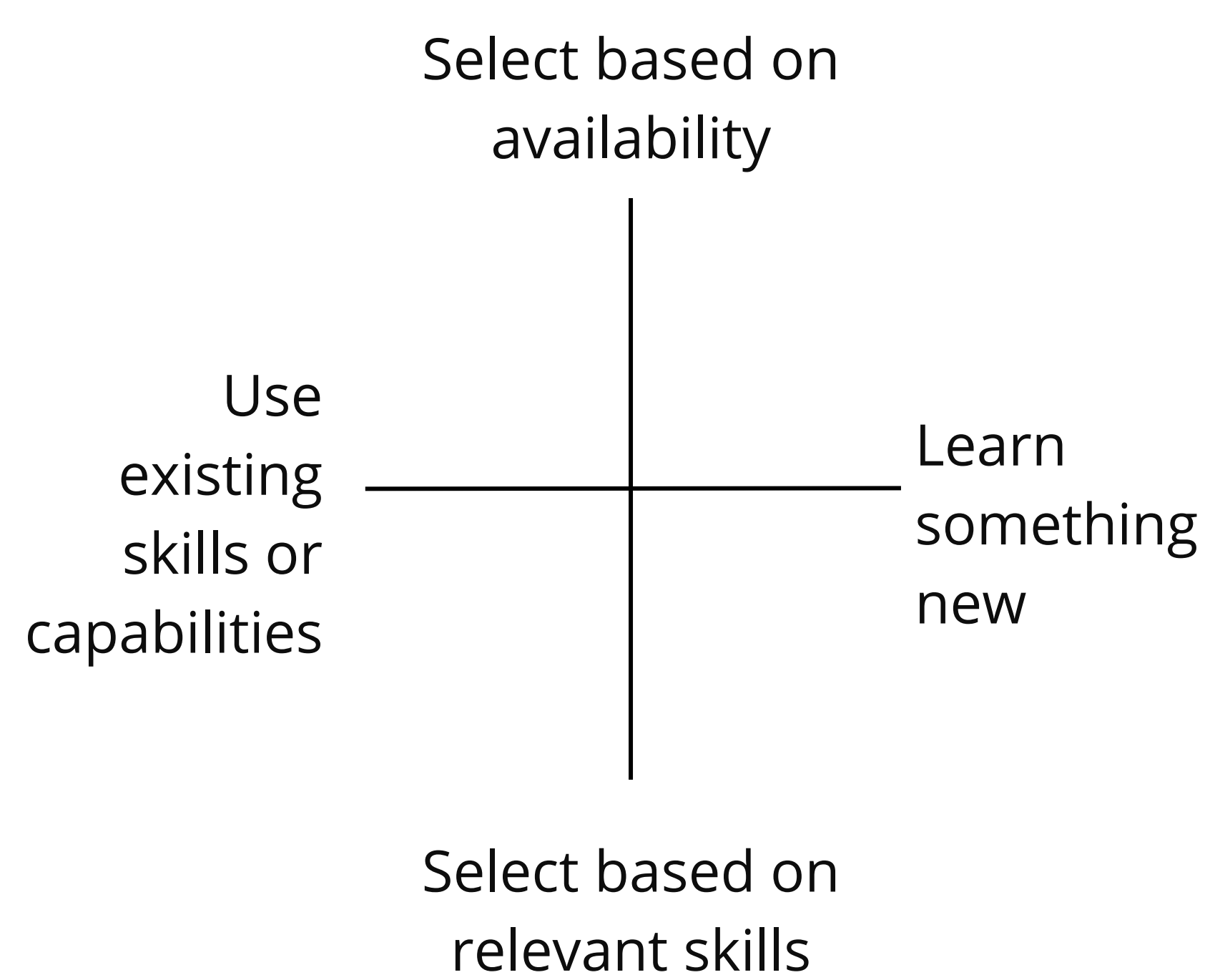


# The Volunteering Variety Show

## Challenge statement

How can we educate and inform as to the wide variety of modern ways to volunteer, and accurately portray what they can expect from each opportunity?

## Quadrant



## Unmet Needs

- I want to be aware of all the different and / or new ways I can help and give my time
- Not every volunteering opportunity will be right for me (due to potential physical constraints), but I would appreciate choice and variety so I can find something that might be a good fit for my abilities
- I want age-relevant opportunities
- I want opportunities that will utilise the skills I have gained over decades of employment and life experiences, so I can truly contribute
- I want to be inspired and have the opportunity to learn new skills

## Participant quotes

*"The barriers for me personally are physically getting there, unfortunately with a few conditions that cause fatigue makes it difficult for me as I have limited energy but perhaps I should explore if there is something I could do from home."*

*"Personally I am not comfortable asking for money. I have done raffles and sponsored runs, coffee mornings etc in the past but collecting the money was not for me! I think at the moment I would find it even harder as people are struggling with their own finances more. I'd be much more inclined to help in a practical way. I have some health issues that can restrict me at times and I am someone who likes to be very reliable.."*

*"If the charity has local input, then volunteers could help to man events or participate in fundraising dinners etc. For instance they could volunteer to help man the reception desk at a hospice, or help out at Cat Rescue, or at Riding for the Disabled.etc. Most of the larger charities do not have local areas like this.."*

*"Charities could stress that you dont need to have personal experience of the or be directly affected by the cause the charity is supporting .I considered volunteering for Terence Higgins trust locally but felt as a straight, older woman, I may not have the required lived experience they wanted. I also found the application form quite dauntin.."*

## How Might We...

Explicitly show what a volunteering activity looks and feels like?

Tailor opportunities so they are relevant to their age group's abilities and interests?

Show them more online accessible volunteering opportunities?

Help them feel like they're the experts bringing the skills to the opportunities?

Promote the wide range of opportunities available?

Use Boomer Women to recruit their peers by using them as advocates for what they experienced?

Offer local volunteering based on the accessibility Boomers have to community areas and places?

Use this generation to help build your on-the-ground, in-person opportunities?

Help Boomers when they're 'shopping around' for volunteer roles, e.g. by saving their choices for later?

## Creative Exercises

If you had to change existing opportunities to be more age-relevant, what would you change?

If you had to create 3 new roles for Boomers, what would they be?

How would you show lots of choice if you were ClassPass?





# Micro Volunteering



## Key insight

“I thought retirement would mean plenty of time to myself and my activities. But I guess times have changed as I now spend a lot of it looking after grandchildren and others around me!

I don't always have large chunks of time to help out, and my availability can be quite changeable. So I don't feel I can throw myself into a time intensive or demanding volunteering schedule currently.”

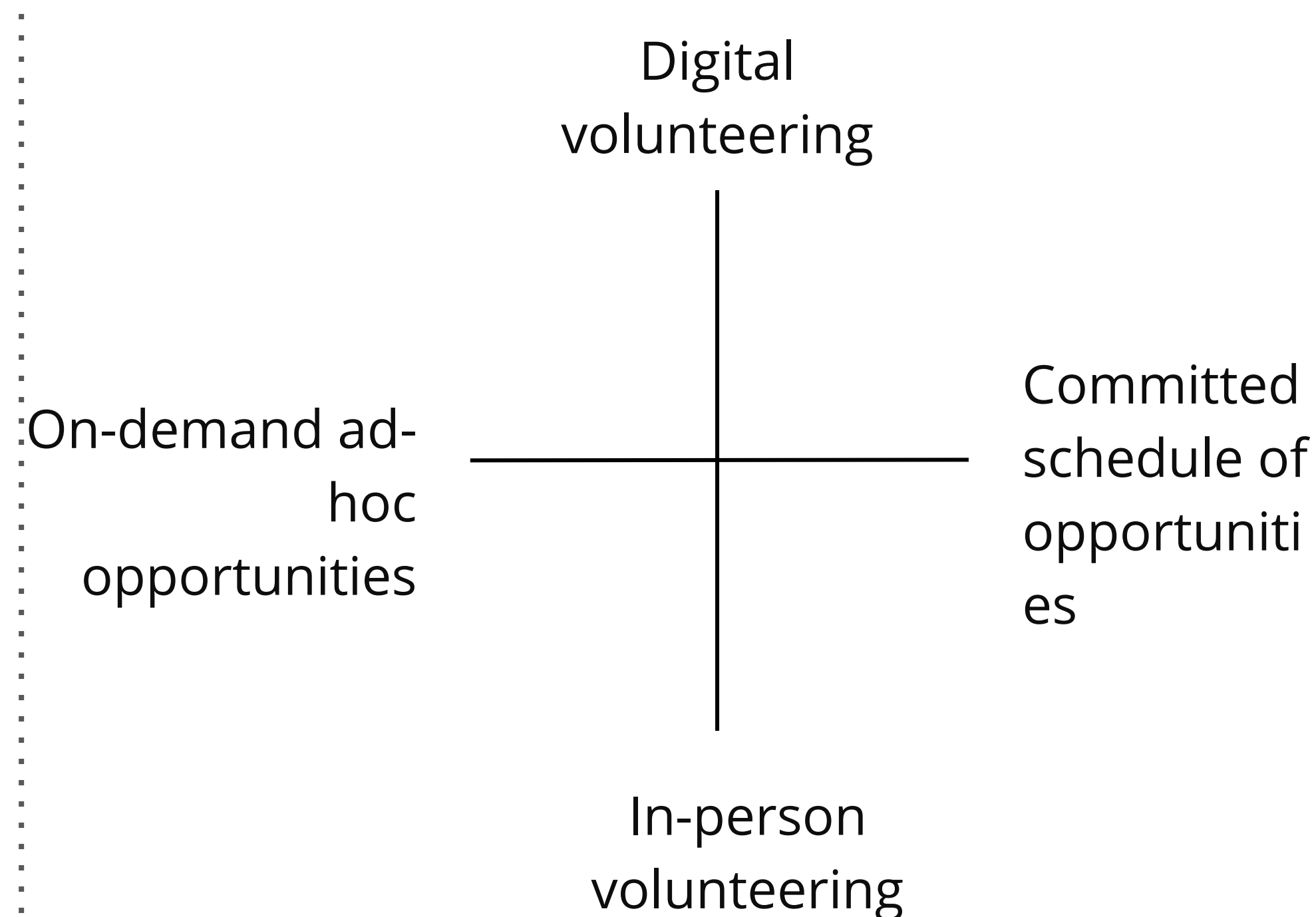


# Micro Volunteering

## Challenge statement

How can we provide more flexible and ad-hoc volunteering opportunities to stretched Boomers so they can make it work for them and their time?

## Quadrant



## Unmet Needs

- I've lived a long productive life. I want to give back, but I've also done my bit in my time. I want to find a way to give back that fits into this phase of life.
- I need to know exactly what to expect from volunteering activities
- I need to be told about the range of opportunities, I don't have time to look for them
- I need to be able to plan my schedule. I need to know the time commitment required upfront
- I want volunteering to be quick and easy, I don't want to go through lots of admin every time I want to volunteer
- I want little moments of escape across my hectic week
- I need flexibility to book my time for volunteering at short notice

## Participant quotes

*"I think they were quite prescriptive on the hours/days you had to 'commit' to and also the DRB check requirements ( I already have an advanced DRB check due to the nature of my work) and while I understand the need for these checks when working with children Im not sure they were really required in this role."*

*"I would love to do more to help with charity work but time doesn't allow me to until I decide to retire from work. I work three days a week and help out with the grandchildren so it's really difficult at the moment.."*

*"I volunteered a lot to during the pandemic with the Foodbank. Since the pandemic I am back working full time so don't have as much time to give. However, I do help out occasionally on a Saturday still. I would help out more if there were more opportunities to volunteer in the evenings."*

*"Charities need to be flexible regarding the amount of time given. Support needs to be there if you are unable to undertake what you have volunteered to do. If this is due to a change in circumstances which will be rectified in a short time, then they need to have contingency plans, otherwise you have a guilt trip."*

## How Might We...

Make volunteering less time intensive by offering short bursts?

Offer Boomers more digital volunteering opportunities?

Manage expectations clearly upfront by being explicitly about the time commitment upfront?

Utilise the idea of 'Volunteer Passports' or similar to reduce the upfront admin required to volunteer?

Balance flexibility with feeling part of a collective and something bigger?

Encourage long term engagement through an accumulation of shorter time commitments?

Collaborate with other charities to become the go-to place for on-demand volunteering?

Make flexible volunteering impactful and meaningful?

Leverage our charity's assets in order to offer a volunteering experience that is truly escapist compared to their everyday life?

## Creative Exercises

If you only had 30 minutes of their time, what would you offer?

If it was bookable at the last minute, what would you do?

How would you do this if you were Uber?



# The Ultimate Career Transition



Volunteering



## Key insight

“For most of my life, whether working or with my family, I’ve had a strong sense of purpose and direction. Now, as I enter the next phases, I’m not always sure where this feeling will come from.

I’m looking to enjoy this phase of life, but I also want it to feel meaningful. I want to find activities and ways to use my time that continue to make me feel purposeful.”

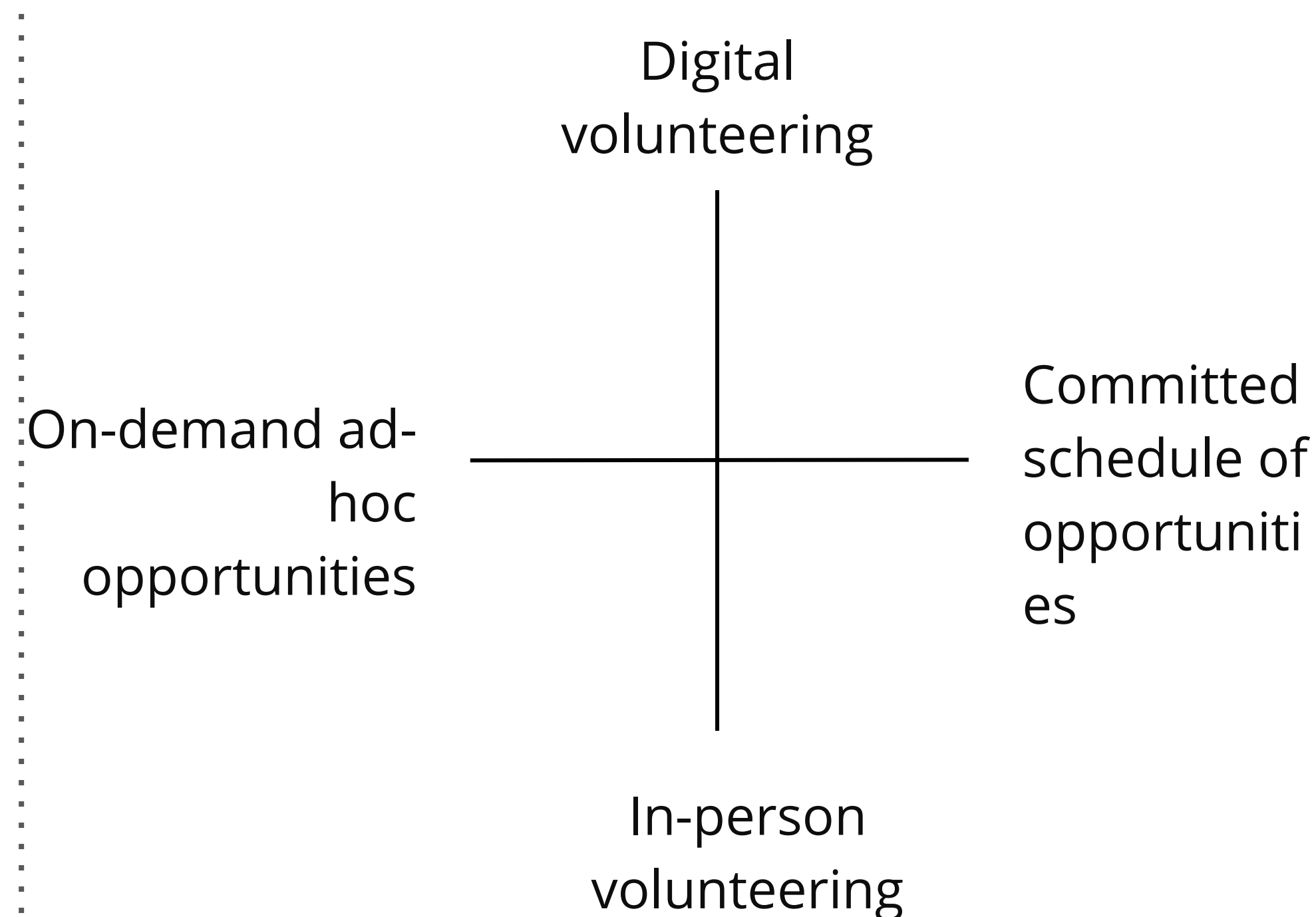


# The Ultimate Career Transition

## Challenge statement

How might we be able to offer Boomer Women a clear way of thinking through how to continue to have a sense of purpose and meaning?

## Quadrant



## Unmet Needs

- As I consider retirement and what that means, I can struggle to know what I am going to do next
- I have lived my life around goals but now I am not sure what these are
- I have skills, expertise and experience that I would love to use, and to feel useful through showcasing them
- I want to have clear direction around opportunities and expectations, not just vague promises of commitment
- I might have mobility issues and might not want to be a steward at an event (though never assume!), but I would love to help virtually or online
- I have a set of hobbies and interests that I want to explore, and would love to know how I could use these to contribute more widely

## Participant quotes

*"When I click into my charity admin work I feel I have some purpose, otherwise I have a sense of just filling time."*

*"When I click into my charity admin work I feel I have some purpose, otherwise I have a sense of just filling time."*

*"In the 80's I volunteered with the charity Mencap whilst still at school, helping at a local activity club and yearly holidays to the YMCA at Scarborough. These were very rewarding, I met and made friends with many lovely people."*

*"Barriers are not having a clear policy and pathway to volunteering, not giving volunteers enough to do or keeping them in the same role without opportunities to try something different; and overriding their input or time when it suits them."*

## How Might We...

Offer opportunities for discussion?

Play into their love of hobbies e.g. allotments, craftwork, singing?

Build volunteering journeys and opportunities to fit their lives and goals?

Help people to set goals for this next period of their life?

Utilise their skills, expertise and experience better?

Create more formal volunteering opportunities?

Help people to work out for themselves how to find a sense of purpose/meaning?

Be more inclusive with the types of volunteering opportunities?

Utilise experienced volunteers to mentor core staff?

## Creative Exercises

If you designed a workshop for those in the pre-retirement stage, what might it look like?

If you had 100 people with decades of experience in high up positions who wanted to mentor core staff, how would you make this work?

If you met someone retiring at 60, and they had another 20-25 years of volunteering ahead of them, how would you start the conversation?



# Keeping it Local



Volunteering



Campaigning

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## Key insight

“When I think of my generation, I think of core values and looking out for one another. I feel a sense of local community spirit, and wanting to support those around me where I can.

But a lot of the world today can feel big and disparate. As I’ve gotten older, I’ve felt a yearning to return to those older ideas of community and making a difference in the lives of those around me.”

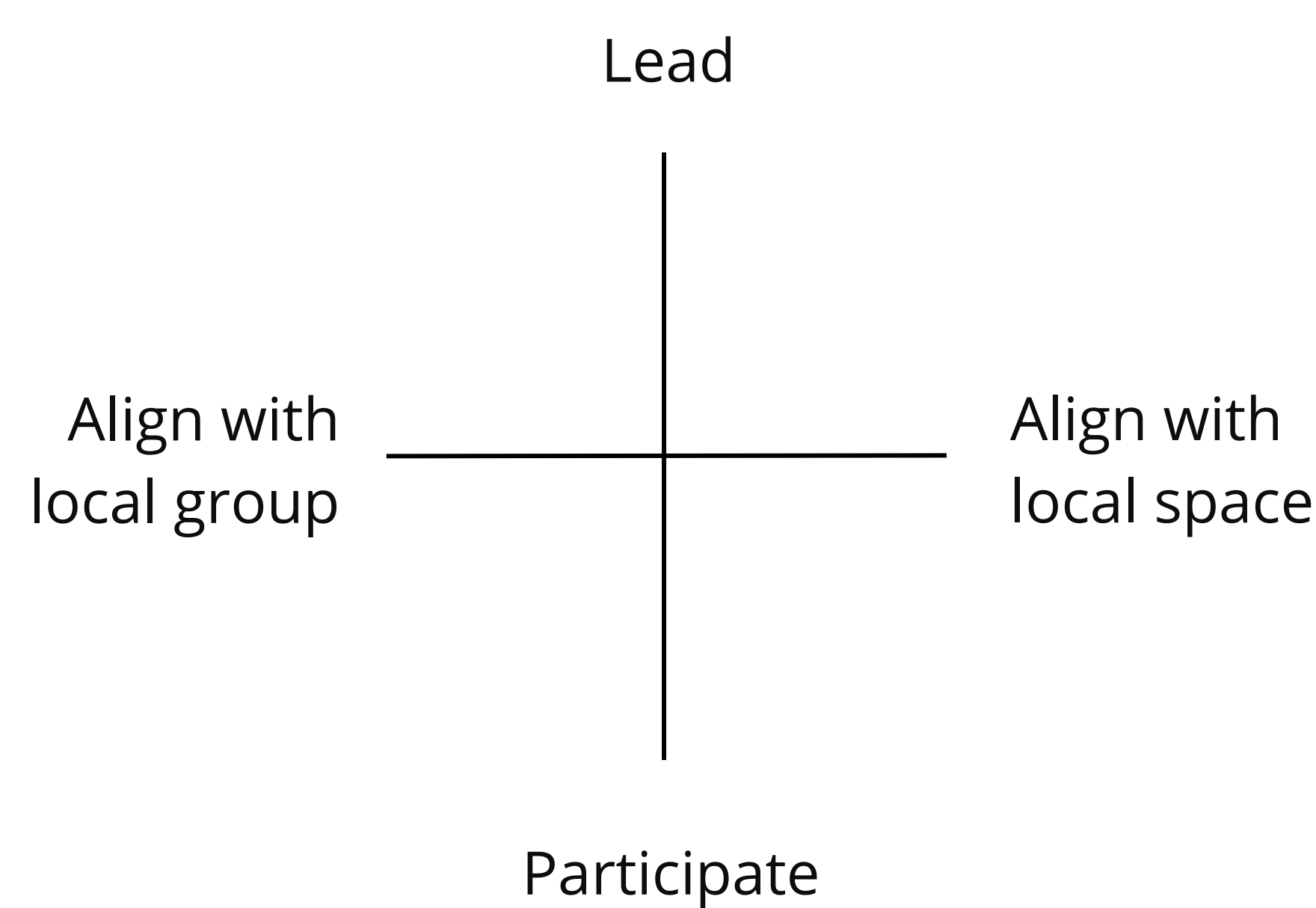


# Keeping it Local

## Challenge statement

How can we help Boomer Women to see the role they can play in helping organisations, no matter their size, have an influence on a local level?

## Quadrant



## Unmet Needs

- I want to physically see some representation of the difference I am making (even if that's a shopfront or a poster)
- I want to feel connected, a very 'real life' way, to what I am doing
- I need to feel like I belong and that I am contributing to the community directly around me
- I want the element of familiarity and safety that my own neighbourhood brings - whilst I am having some sort of new adventure
- I need opportunities to be accessible and visible
- I need to be able to share/ talk about what I'm doing with others locally
- I want to feel good old fashioned community spirit

## Participant quotes

*"I am constantly surprised by the number of charities that I haven't heard of who are doing amazing work. Particularly regionally, people may have a great charity close to them offering face to face support, while other people who live far away can only access online support, or sometimes no support at all."*

*"They're better at publicity, campaigning and fundraising in general but risk getting too big, professional and out of touch with their supporters and user."*

*"Because of circumstances in my family I support a local dementia group. I can understand how families can struggle and feel very isolated when this horrible illness takes a family member. These are both local charities which are well supported by the local community. They have been started and are run by local people to meet a need."*

*"Over the last 5 years, having got a dog which I walk in our local park/woods I have become more directly aware of local wildlife and so have supported smaller charities like the London wetland centre."*

## How Might We...

Create local action groups or volunteering groups, even for global causes?

Make the most of physical spaces to get people to come together (e.g. malls/ community centres)?

Use local events to piggyback our activities onto?

Invent campaigning asks which are designed to be spread virally, but IRL (In Real Life)?

Create healthy competition between different localities to be the best campaign town?

Equip Boomers with the right resources to enlist the help of their local friends and acquaintances?

Weave campaigning and volunteering into the ways that Boomers are already spending their time locally?

Partner with other local groups to help bring a more 'local' presence to life?

Contribute to the regeneration of the British High St by using it as a place for campaign activity?

## Creative Exercises

Draw an imaginary map of a town and highlight where a Boomer Woman is spending her time

What would your ideal pop up in a shopping centre look like?

What would a 6 month long collaboration with a local WI group look like?





# Reverse Mentoring



## Key insight

"I'm a regular charity donator, and have tried my hand at volunteering over the years. But campaigning has always felt like a step too far to me. How would I even begin? I worry that I'm not built for something like that.

But then I see the younger generation being bold and brave, and wonder if I should be doing my bit, too. I could maybe learn a thing or two from them and how to go about it.

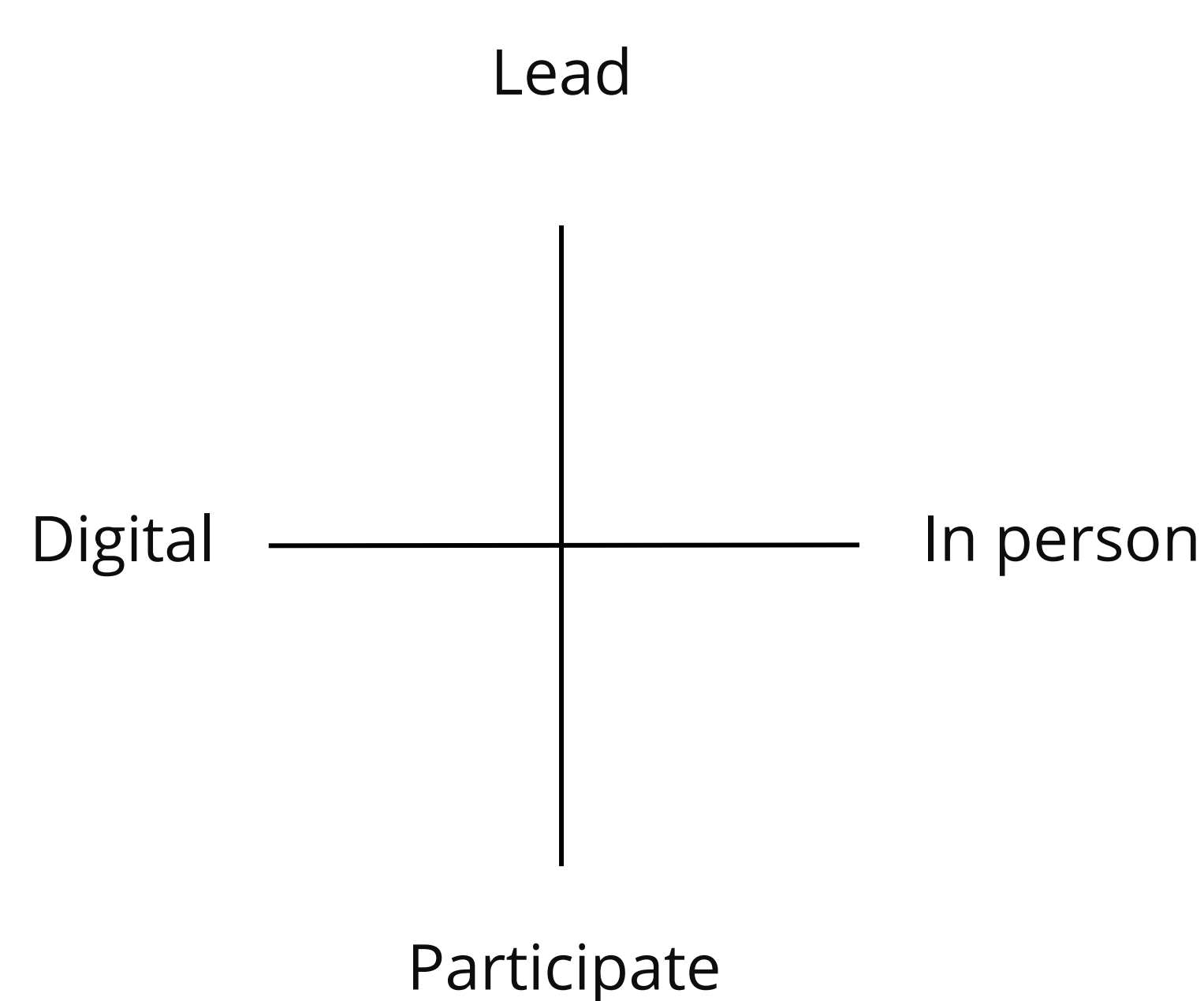


# Reverse Mentoring

## Challenge statement

How might we educate Boomer Women on what campaigning is, what it involves and how it makes a difference in a way that feels safe and inclusive?

## Quadrant



## Unmet Needs

- I want to understand what campaigning actually involves
- I want to feel safe when promoting a cause, and can feel scared about the prospect of confrontation
- I need clarification on the broad and varied approaches to campaigning, including what I can do online or from my home
- I need information and guidance on how to get involved
- I want to promote worthy causes, rather than get drawn into politically divisive issues on the front lines
- I want to be a source of inspiration for younger generations that I am contributing to their futures

## Participant quotes

*"If I had more information of the level of commitment required to get involved in a campaign, this would help me to evaluate whether I had the time to get involved. The barriers or obstacles are time: time to read to lengthy article about the campaign. Case studies of people who are currently involved in a campaign would help me to decide whether this is something I could commit to.."*

*"I think when I was younger I would have been more of an activist but these days I'll put my hand in my pocket when possible but I don't want to get involved with campaigning. And I don't think anything would make me want to do more campaigning. I delayed answering this activity because I don't like my answer but it is an honest answer."*

*"I would worry if I were to campaign say...in the street, that I wouldn't know enough about the issues to answer all the questions the public may ask."*

*I would need to ensure I was as fully informed as possible."*

*"Charities could set out guidelines and information regarding particular campaigns. Perhaps it could be a social media exercise ie: Facebook. They could also advertise events more through social media. I think barriers could be a lack of understanding of events and campaigns. Information communications would have to be very clear."*

## How Might We...

Create campaigning guidance packs for Boomers?

Create ways of campaigning that aren't time intensive but still feel impactful?

Create a campaigning user journey so it feels more impactful than taking one isolated action?

Create more online campaigning activities?

Provide more explicit information and guidance about what campaigning entails?

Showcase the journey of individual campaigning efforts and how it was made to feel safe and inclusive?

Give evidence of how campaigning works, and the difference it's made in the past?

Give ownable or visible credit to people who have campaigned - a badge of honour?

Link potential campaigners up to a wider community, for support and inspiration?

## Creative Exercises

What would be the perfect campaigning opportunity for Boomers?

What does the campaigning version of Macmillan Coffee Morning look like?

What would be the chapter headings for the 'How To' book of campaigning?





# Women Squared

## Key insight

“Throughout my life, I’ve always felt that strong women around me have been able to come together to address important issues and drive change. We’ve been the voice across a few generations.

But those opportunities seem to fade away once children have moved on and out, and you’re nearing your career’s end. I’d love to keep building those connections.”

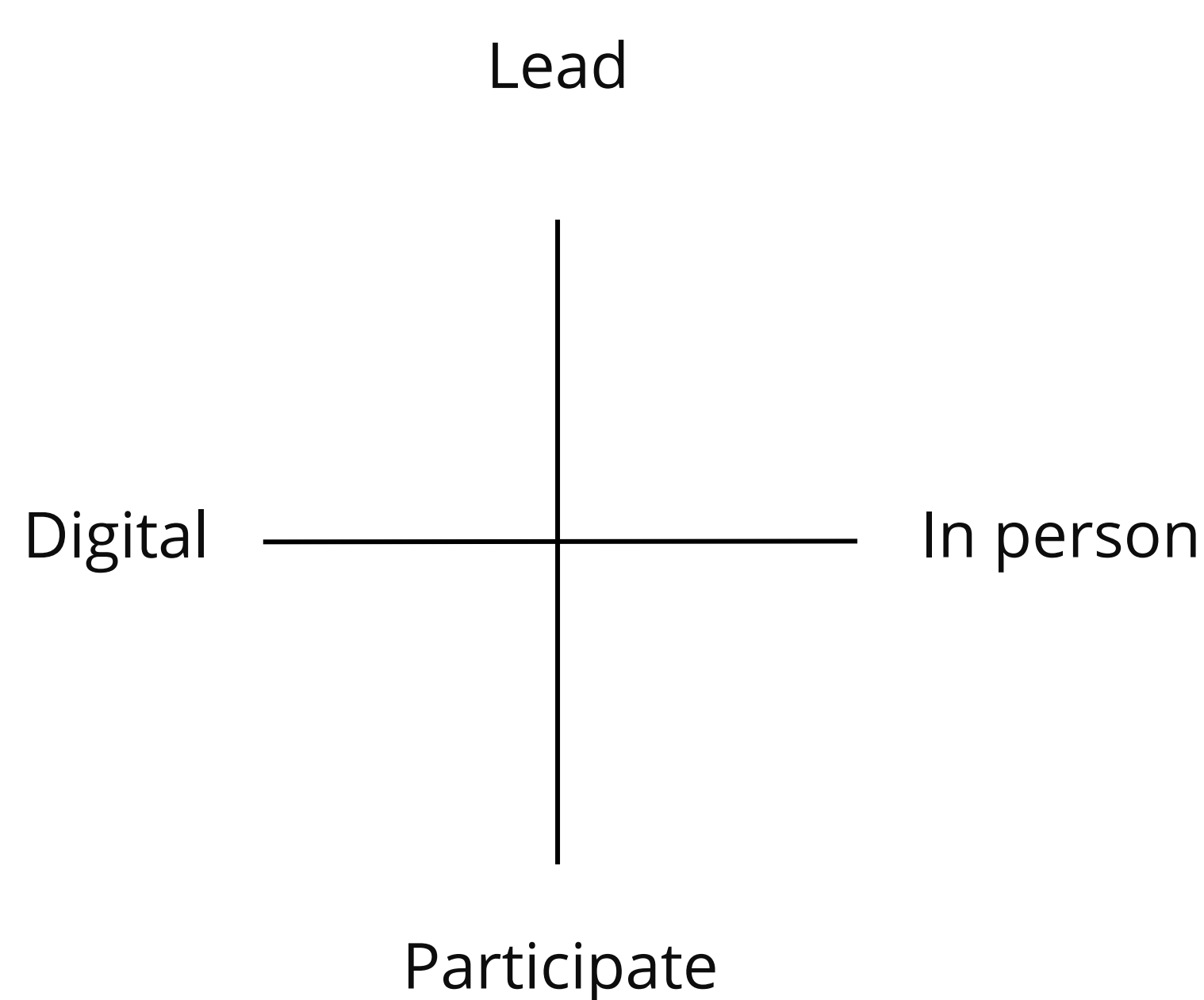


# Women Squared

## Challenge statement

How can we harness what many feel to be a natural kinship amongst women and direct it towards continuing to drive societal change?

## Quadrant



## Unmet Needs

- I want to be a part of a collective effort with my peers
- I want to feel safe whilst being inspired
- I want to feel empowered to influence my friends, family and the people around me
- I want access to join forces with a community of like-minded people
- I want to know about campaigns or events I can participate in with peers
- I need to be motivated to do even more
- I want to know others care as much as me so we can support each other in making change
- I want to use, share and be inspired from the skills of my female peers to rally around a cause

## Participant quotes

*"Here I have so many friends who have lost a partner to cancer, who have been supported in a variety of ways by Macmillan, that it was inevitable I would be drawn in! The volunteer fundraising group is very active here and many of those volunteers also volunteer alongside me in other areas so we work together."*

*"The power of music and song is so strong in evoking memories. I sing in a choir and know the enjoyment and benefits gained from it."*

*"I have in the past attended demos, which I love! Marching with like-minded people is very uplifting."*

*"Our local community campaigned for speed bumps and a speed camera. I live in a cul-d-sac which is near a busy street. When our children were young and playing out we were all worried as parents as it seemed attract a lot of 'joyriders', motorbikes, and speeding traffic. This became a concern to us. My neighbour lobbied the Housing dept, highways and the police who looked in to this for us.."*

## How Might We...

Use womens lifestage experiences (grandparenting; health?) to bring women together?

Create digital opportunities for collective campaigning?

Help individuals feel part of something bigger?

Provide age-relevant collective campaigning opportunities?

Promote collective campaigning beyond friendship groups?

Provide opportunities to do this with friends who may not be as passionate as them?

Buddy up experienced campaigners with fledgling ones?

Encourage campaigners to network with others online by recognising follows and connections somehow?

Tell positive and exciting stories about the power of small groups as well as the whole movement?

## Creative Exercises

What would a modern day version of a Recycling Drive look and sound like?

What would the ideal influencer look and sound like for your cause?

Rebrand your movement, and explain it as if talking to an alien



# The Happy News



## Key insight

“I can find it difficult to only see people struggling on posters made by charities. It’s been a common approach for decades now and I feel like the impact has become less as a result for someone like me.

It is not that I don’t care - I just can’t deal with the volume of despair and negativity. I would love to be reminded of my money going somewhere and making a really positive change.”

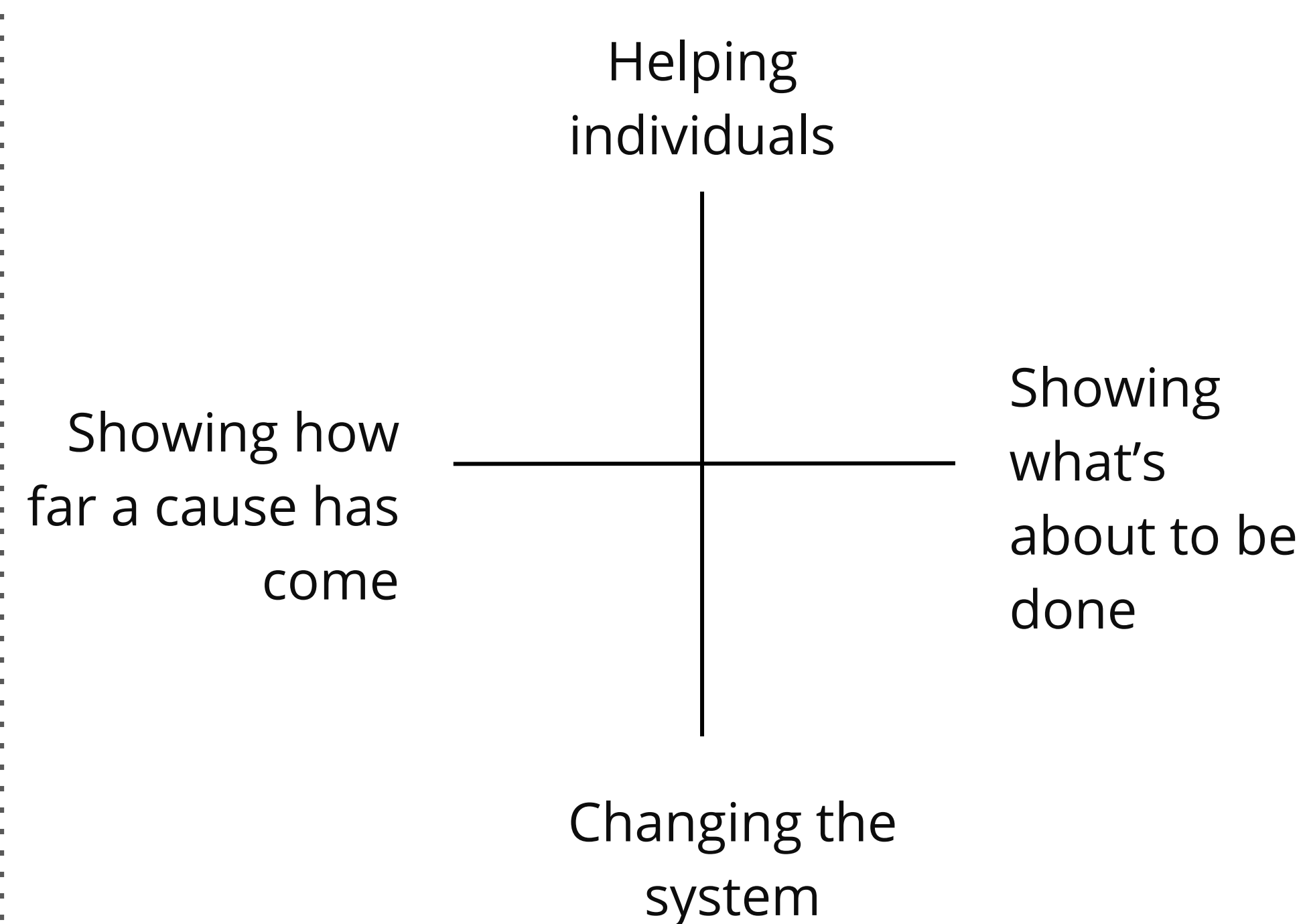


# The Happy News

## Challenge statement

How might we offer more emphasis on the positive lights of donating and how it changes lives?

## Quadrant



## Unmet Needs

- I need to see the change I am making
- I want to be part of something positive and optimistic
- I want to see progress over time (especially as I've been giving for a lifetime already)
- I want to see how I'm contributing to lasting change
- I want evidence and acknowledgement of systemic change as well as instant 'aid'
- I need to feel a sense of hope, especially given how hard my own day to day life can feel
- I need to feel that life is worth it sometimes
- I want my privilege to count for something for others

## Participant quotes

*"So many campaigns show distressing pictures of children or animals but this one focussed on the potential that children have to overcome their circumstances. I think there was a slogan "Incredible things happen when you believe in children". The songs they used to back the videos complemented the children well and the statements made throughout the adverts though they mentioned the horrid circumstances the children were having to overcome they emphasised that those circumstances do not define them."*

*"The cancer research advert where the guy sings "head shoulders cheese on toast" to the little boy. It sticks in my mind because he made the boy laugh despite his treatment and then to see him running about at the end was wonderful and a reminder that there can be positive outcomes."*

*"I think one of my favourite charity campaigns was the recent John Lewis Christmas ad which promoted children in care and sought to highlight this. It wasn't a specific charity attached to the advertisement but it was so beautifully done and was talked about significantly. It made a difficult subject and one that isn't necessarily a cutesy animal campaign or the usual cancer type ads more visible and it was both touching and informative."*

## How Might We...

Build more feedback loops into the process of donating?

Engage people with a happy ending first, and work backwards to take them on the cause journey?

Surprise people with unexpected good news, in some form other than email?

Be the very brightest and most optimistic thing to come through someone's letterbox?

Leverage a fuller range of positive emotions beyond just 'happy', e.g. humour; excitement; calm; curiosity; pride?

Allow donors to unlock more happy vibes, the more they give?

Equip supporters with easy-to-retell stories of how they've helped?

Give physical 'leave behinds' that feel good to display in the home and bring a happy feeling?

Think about showering our supporters with happiness, rather than just Thanks?

## Creative Exercises

What would our comms look like if everything were framed around happiness and achievement, rather than need and adversity?

There is something called the [Happy Newspaper](#) - what would your charity's version of this look like?

Draw a timeline of the journey of 'your cause' from 100 years ago. What's happened in that time? What successes have there been? What could the future timeline look like?



# Proof of the Pudding



## Key insight

“I grew up with big charities making big differences in the world. But over the years, I’ve become increasingly aware of media stories around donations not being used appropriately, or just going to large CEO salaries and offices.

I want to feel assured that the donations I’m making are going to have the maximum impact possible on those who need it most, but I’m not always sure of this with charities.”

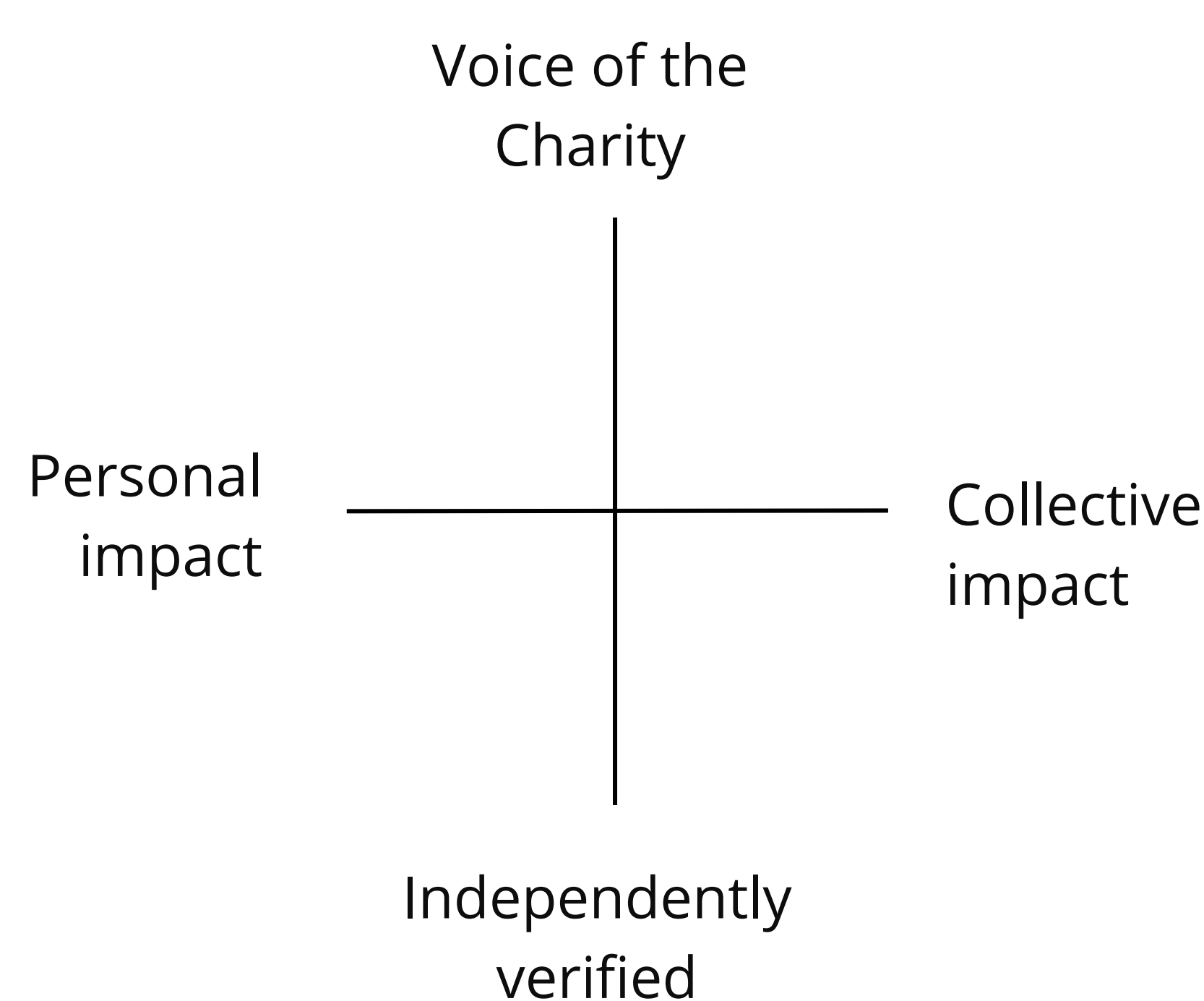


# Proof of the Pudding

## Challenge statement

How might we better convince Boomer Women that their donations are having the highest impact possible on those who need their help most?

## Quadrant



## Unmet Needs

- I want to feel confident that any donation I give is having the maximum possible impact
- I want 100% of my donations to go to the end user (or explain plainly why it doesn't or can't)
- I want greater transparency over how a charity works so I can understand the financial breakdowns
- I don't want to feel like I'm just paying for big CEO salaries without knowing the benefit they're providing
- I want to hear real-life stories from those who are experiencing improved prospects as a result of donations
- I want to see proof from credible sources about your charity so I can trust the facts behind your claims

## Participant quotes

*"I especially like to donate to the British Heart Foundation as they always send me an letter update ( see photo) on how much my donation has raised. This makes me feel valued and happy that my donation has helped others."*

*"I was surprised (and gladdened) to see that the service took priority over the donation request."*

*"I feel that the best way to campaign is to make people more aware of where there money goes and how it helps their chosen charity."*

*"I think the sort of media campaigns that show what a particular amount per month could support are very effective - for instance with RNLI and Water Aid - as it sets it in a relatable context and is often a relatively modest amount that people may think they could afford each month."*

## How Might We...

Be more transparent about the ways donations help charities bring about positive change?

Show the value of a causes's expertise, heritage, inherent knowledge, size and experience as part of donating?

Show how trusted you are through your relationships with other communities, organisations, and research bodies?

Show impact of donations as clearly and simply as possible?

Learn from individual giving pages in terms of the real-life stories they tell?

Show the value of the office admin and logistics work you do behind the scenes?

Continually update Boomer Women as to the impact of their donations on an on-going basis?

Create education packs on how causes bring the most value to the people they support?

Tell better stories around the experience of your leadership teams, and justify the value they provide?

## Creative Exercises

How would you approach donations if your cause was a Just Giving page?

If you were to run a night-learning programme for financing your cause, what would the modules be?

What would a 'crowdfunding' model for your charity (like Beam.org) look like?



# Maximising Cultural Wagons



## Key insight

“As I’ve gotten older, I’ve noticed more and more causes stepping into the limelight. But that can also make it difficult to keep up with all of them. Understanding the various issues isn’t always easy.

When a cause is more openly prevalent across different forms of media, with experts sharing views alongside everyday people, it makes it easier to get to grips with what the real needs are behind it.”

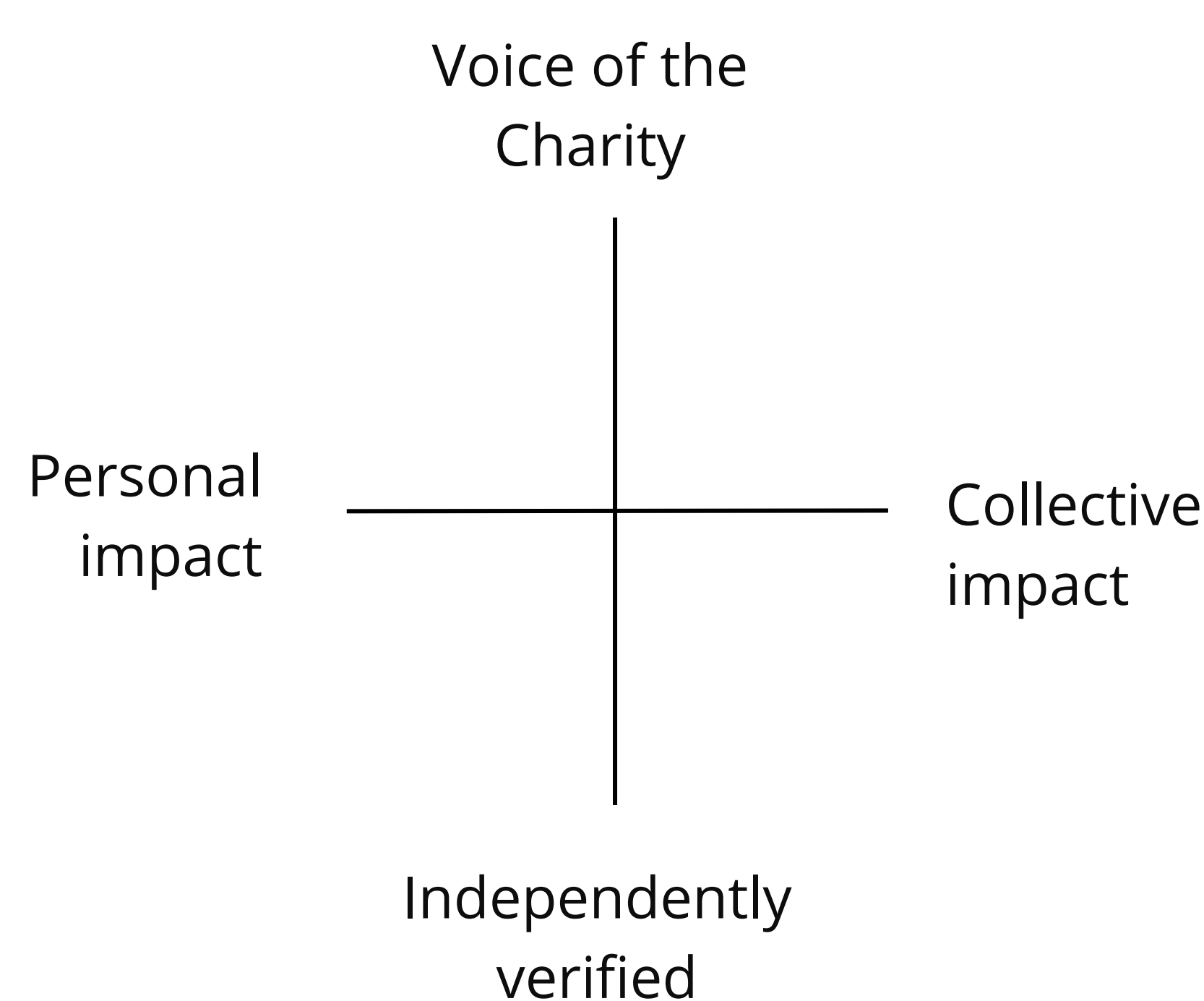


# Maximising Cultural Wagons

## Challenge statement

How can we identify opportunities within the cultural zeitgeist to promote a cause more openly, and lean into influential voices in the space?

## Quadrant



## Unmet Needs

- I hear a lot of terms being mentioned, but I don't always understand them.
- It's difficult to keep up with all of the modern issues of the day
- When it comes to issues I'm less familiar with, I'm not always sure how best to help, or even if I should
- There's a lot of conflicting noise around facts, and I want to hear credible conversation from personalities and organisations I can rely on
- I find it easier to build understanding when I hear trusted, credible mainstream voices speaking on difficult issues
- I am more motivated to support a cause when I feel that it is one that unites through our media culture

## Participant quotes

*"In the present climate I very much wanted to help in response to all the hunger for so many people in the UK and I went looking for a charity that I could donate to."*

*"In the last 5 years, the MIND charity stands out for me. Mental health is now talked about more openly and positively in society. I was drawn to the MIND marketing video where individuals were talking about their struggles with mental health. I was also drawn to the MIND marketing slogans: "1 in 4 people in the UK will experience mental health problem" and the slogan "1 in 4 of us, every day is a fight". This statistic made me more aware of how important it is to take care of our mental health."*

*"The charity that came onto my radar more recently is Christians against Poverty. They often have a spokesperson interviewed on radio or TV on issues around poverty and debt. Martin Lewis also spoke about them I think he might have had a role as an ambassador."*

## How Might We...

Think creatively about PR strategies timed with cultural moments?

Work with media personalities on a long-term basis to unite behind our causes?

Strike a consistent tone of voice that speaks to credibility?

Identify age- and era-relevant influential voices to support our claims?

Collaborate with trusted content producers to deliver our messages?

Get ourselves known on podcasts, viral 'explainer' videos and other in-depth media formats?

Keep our ears on the cultural pulse to identify optimal opportunities to input into the conversation?

Deliver a credible presence across social media that allows us to relevantly interject in real-time?

Work with Boomer women to help drive these cultural conversations?

## Creative Exercises

How would a Netflix documentary synopsis for your cause be written?

What would the ideal media personality look and sound like for your cause?

Rebrand your movement, and explain it as if talking to an alien





# See-Through Bequesting



## Key insight

"I've seen a few charities change course over the past few decades, to the point where they might not stand for the same causes that they did when I was younger. That worries me when I think about leaving money in my will.

How can I trust that a charity will remain true to its mission and ethics in the years after I'm gone, and that my donation will support true beneficiaries?"



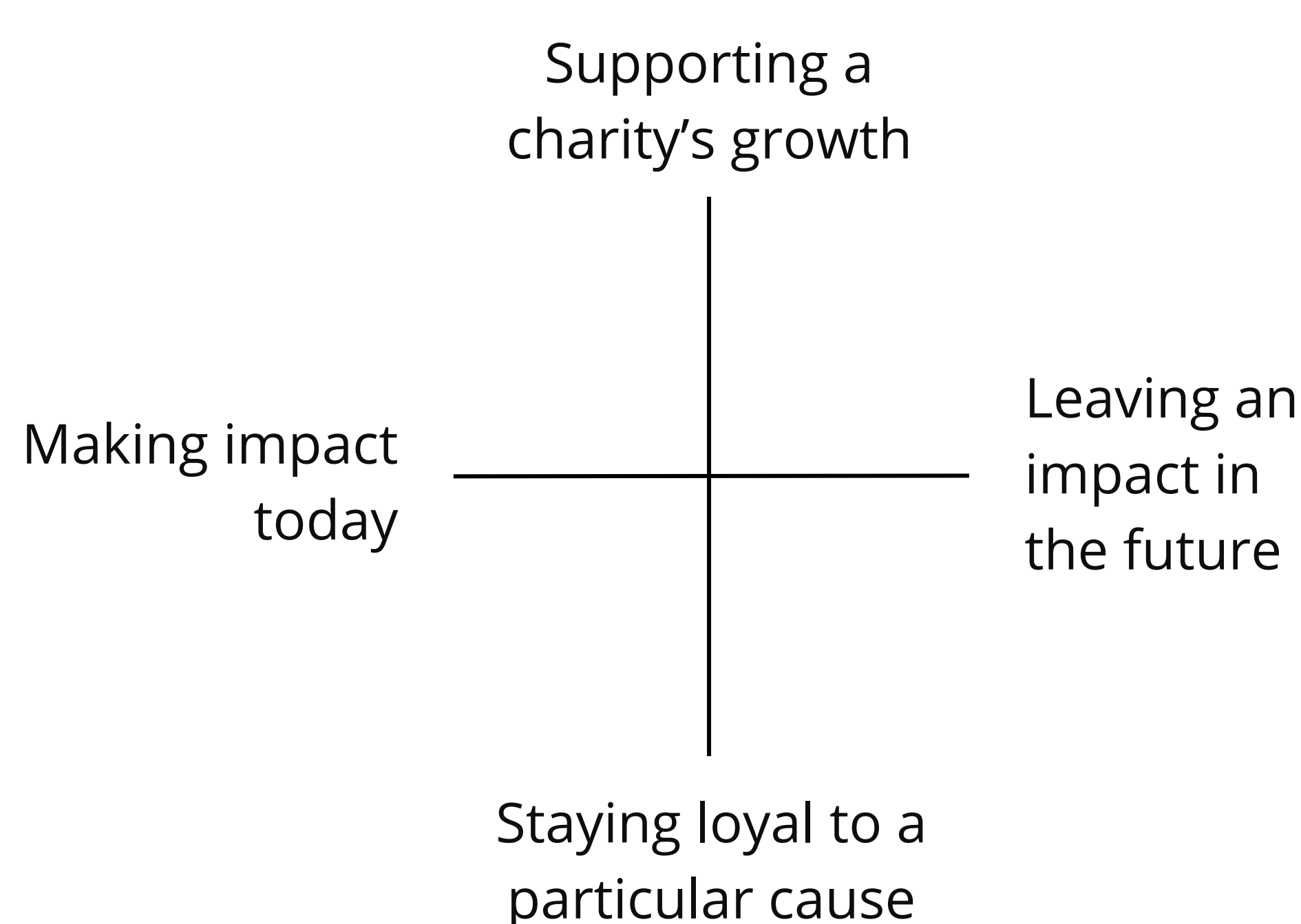


# See-Through Bequesting

## Challenge statement

How can we consistently reassure this audience today that their impact in the future will have the maximum possible benefit?

## Quadrant



## Unmet Needs

- I worry that a charity might alter its giving strategy after I'm gone
- I don't like to think that a donation in my will might go towards salaries or a nicer office
- I want to feel assurance that someone's life or situation will be directly impact by my donation
- I want to have an impact at a local level on those around me, and worry about a donation potentially getting lost in a large pool
- I want to see a firm commitment to maintaining ethics and ambitions in a meaningful way
- I want to feel like I can trust those in charge of making long-term decisions

## Participant quotes

*"There are times and situations where a charity can do a better job than government provision - for instance when supporting those who are suspicious of government/police etc. But there needs to be good accountability and sustainability whethere it is public sector or third sector provision."*

*"I'm mostly risk averse (I will invest but I like to know what the track records are for the companies I consider investing in and if anyone suggested crypto/NFTs it would tarnish my opinion of them forever. As long as I understand the risks involved I will take limited to moderate amounts of risk - but I clearly need to iunderstand the pros/cons and timescales involved."*

*"Will my wishes be met, or concentrated in a particular area eg continue to provide singing classes. It would be great if funds could be used at a particular branch eg Barnet."*

*"Charities should make it clear how bequests are used e.g the McMillan site says over a third of their work is funded from legacies. They give examples of how their money is used. They offer free will writing with no expectation of being named."*

## How Might We...

Offer a level of ring-fencing for donations to specific projects?

Most clearly position and communicate a long-term strategy?

Signal commitments to future giving goals?

Effectively incorporate a charity's ethics into the legacy process?

Create closer connections to the leadership of a charity?

Provide opportunities for Boomers to overtly match their own giving goals as part of a legacy?

Illustrate the ways that a charity's goals align with the values of Boomer women?

Promote the voices of beneficiaries from previous legacy donations?

Show the scale of legacy donations into the charity sector as a whole?

## Creative Exercises

What would be the chapter headings for the Boomer Women 'How To' book of Legacy & Wills?

What would a 'good ethics' bank account look like? What positive impacts could be shown in the transactions list?

What functionality would a social media network built solely for educating on Legacy & Wills have?





# Stress-free Legacy



## Key insight

“Drawing up a basic will 30 years ago didn’t seem all that difficult. But as I get closer to the reality of it all, I find that there are a lot more questions that I need to consider.

I’m not always sure who’s best to turn to at this stage, or how to have those conversations.

The emotions involved can be confusing when talking about death. I know that I don’t want to leave a burden to those behind, but the trying to cover all the details can be daunting.”

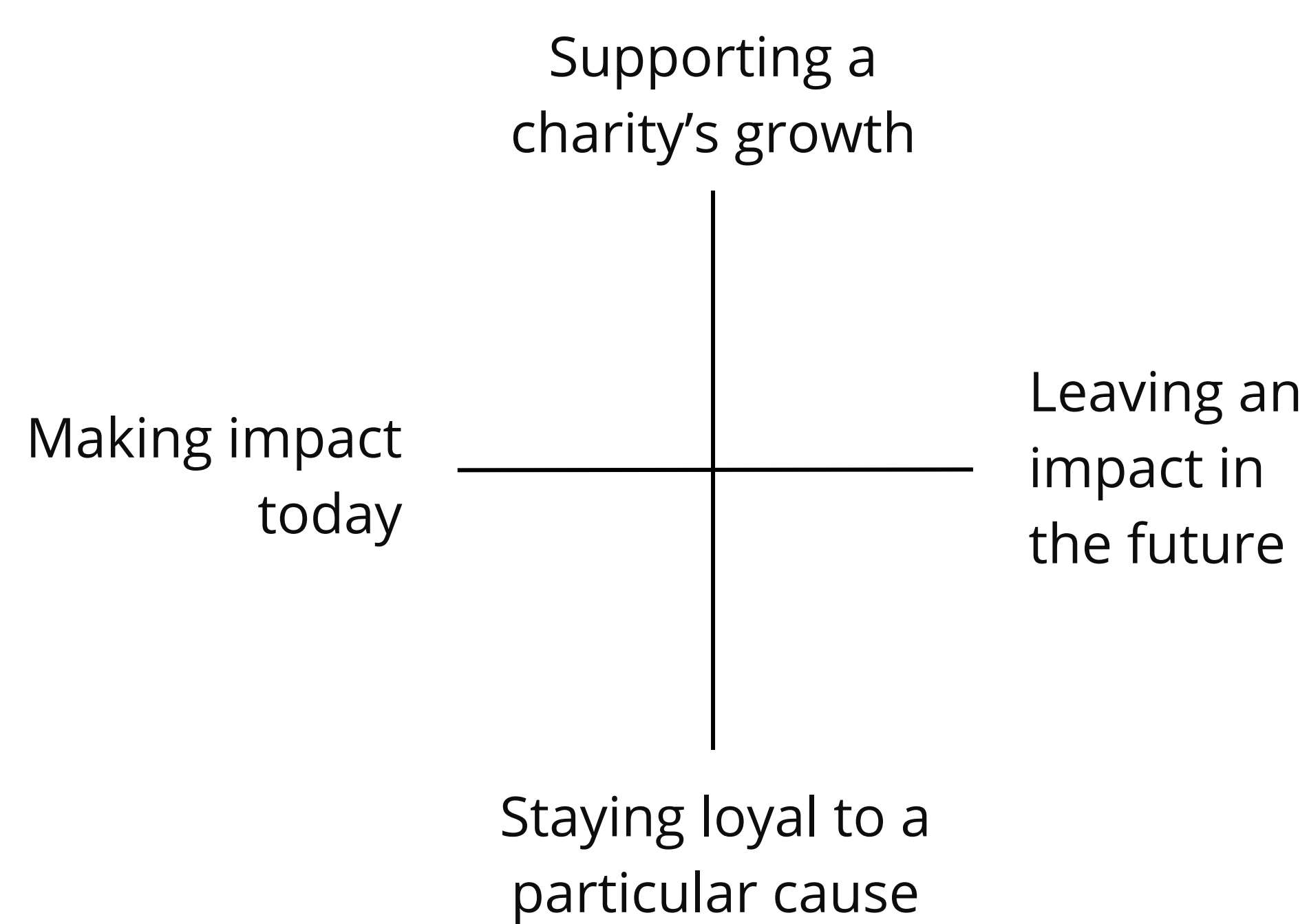


# Stress-free Legacy

## Challenge statement

How can we reduce the stress of getting the details of a will right, not just for Boomers, but for their families and beneficiaries?

## Quadrant



## Unmet Needs

- Having been left to deal with my parents' wills, I know they're not always as simple as they might seem
- I know that I don't want to be a burden to anyone left behind
- How can I know for sure how much I'll have to leave behind?
- I don't know always know what I don't know in terms of the impact a choice might have on others
- I'm not all that comfortable about having these conversations with members of my family
- I somewhat resent having to pay someone to sort out the affairs of my will
- It can be difficult balancing the emotions of writing a will, with the practicalities of getting the details in as good a place as I can

## Participant quotes

*"I am not very good at planning my time as I don't like routine, and I tend to be reactive rather than proactive in many ways. My life tends to be a bit boom or bust where I get increasingly busy and then crash and have a period of much reduced activity until I build up my reserves again."*

*"I'm hoping not to have to make any major decisions for a couple of years as the 14 years leading up to my mother's death involved a lot of very difficult territory to navigate. I then spent a year getting all her affairs in order and selling her property which was far more complicated than I had imagined. Therefore I'm having a sabbatical from any major life decisions and allowing myself some time off to recover!"*

*"People are encouraged make wills when they take out a mortgage, so likely to be young parents and I think another clip targeting this demographic would be good."*

## How Might We...

Best promote the benefits of giving a % of a will, rather than a lump sum?

Position a charity as a relevant voice to help with difficult conversations?

Present a charity as a 'been there, done that' safe pair of hands that knows the right things to ask?

Encourage Boomer Women to be more proactive about updating their original wills?

Provide transparent step-by-step FAQs that breakdown key considerations?

Show empathy with the difficulty of this decision for some?

Lean into the emotional ambition of leaving matters as easy as possible for those responsible?

Reinforce that every effort counts, no matter the size - especially when final amounts can't be known?

Act as a facilitator for family discussions where appropriate?

## Creative Exercises

If you had to give a speech to Millennials about wills, what advice would you give?

What would the world's worst Legacy & Wills advice consist of? Now flip the worst bits.

If you were to design a meditation app around Legacy & Wills, what exercises would you include?



# United Futures



## Key insight

“When it comes to difficult or complicated decisions, I appreciate in-person input from trusted, known entities. This might be an IFA, my former employees or a local community organisation or company.

I’d love to have more exposure to knowledgeable people at these times to discuss relevant options in-person and get their perspective.

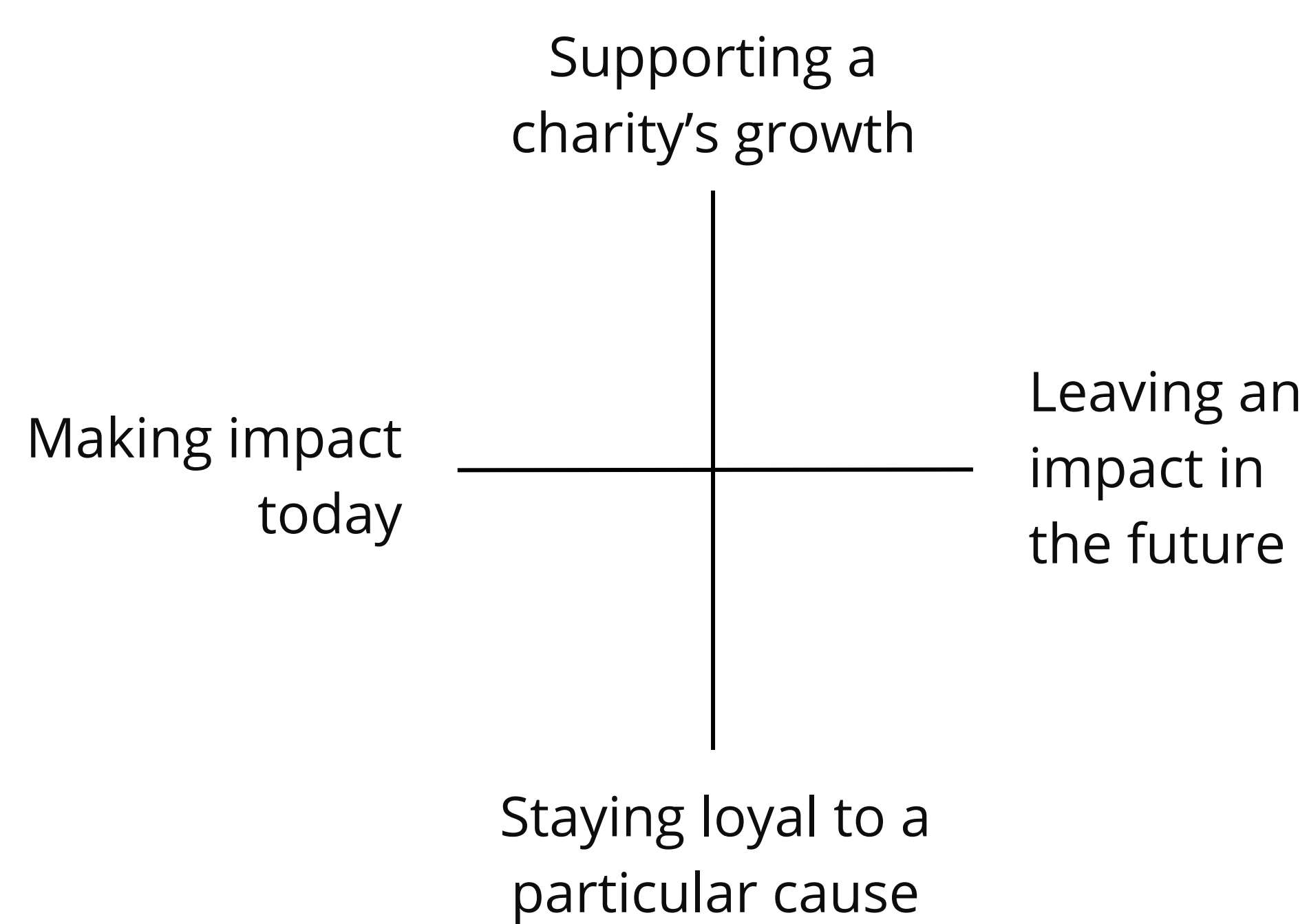


# United Futures

## Challenge statement

How can we provide collaborative spaces and occasions for Boomer Women to discuss their legacy and will planning at a personal, consultative level?

## Quadrant



## Unmet Needs

- I am looking for help when it comes to navigating complicated decisions in my life
- I prefer personal, face-to-face, interactions where possible for difficult discussions over templated forms
- I worry that involving a charity in a will-writing process might create a conflict of interest that I don't feel comfortable with
- I trust established organisations and believe they have credible people, but don't always feel I have access to them when I need to
- It would feel less daunting to be introduced to these topics with peers who are going through something similar

## Participant quotes

*"I think charities should have a practical yet gentle tone when talking about wills, charities and legacies. Provide information that is easy to digest. Perhaps have some flow charts to help people make decisions."*

*"I'm mostly risk averse (I will invest but I like to know what the track records are for the companies I consider investing in and if anyone suggested crypto/NFTs it would tarnish my opinion of them forever. As long as I understand the risks involved I will take limited to moderate amounts of risk - but I clearly need to understand the pros/cons and timescales involved."*

*"Being able to speak to financial advisors and specialists within the charity who are empathetic in their communication/discussion with me over this would be beneficial."*

*"Could there be a pack to be handed out by the hospital when someone gets a diagnosis? admittedly that is a more expensive option for the society than only sending on request."*

## How Might We...

Be as transparent as possible that will-writing services are obligation-free?

Offer a personal sounding board for those who need it?

Establish top-of-mind awareness as a resource at crucial will re-writing moments?

Break down barriers for those who feel they can't afford 'professional' advice?

Create collaborative spaces where Boomer Women can come together to discuss these topics?

Partner with established, trusted community brands or outlets to promote these services?

Engage users of these services as advocates for a broader programme?

Provide clear definitions of boundaries for Boomer Women as part of this process?

Address the feeling that deciding on a will is something that needs to be done in isolation?

## Creative Exercises

How would partnerships with major universities look and feel vs. corporates?

What could a Co-working space look like for sharing Legacy & Wills advice?

What would a Legacy & Wills position look like that starts off with your promise to Boomers,, rather than the other way round?