The future of gifts in wills
This session

1. Introducing this afternoon
2. Innovating well
3. 5 key trends
4. Over to you
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A masterclass in Gifts in Wills fundraising
Downton Abbey style
This session

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What is innovation?

"The ability to conceive, develop, deliver, and scale new products, services, processes, and business models for customers."

McKinsey 2022
The process

Why?
Unmet donor need

What?
A compelling solution

How?
A business model
The process

Why?
Unmet donor need

What?
A compelling solution

How?
A business model
Finding the unmet need: analysing trends

From Thinkingfutures.net
Understanding the bigger picture

Repeating themes

Mindsets, metaphors, worldviews, myths

Underlying drivers

News items
This session

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The process

Why?
Unmet donor need

What?
A compelling solution

How?
A business model
5 trends that are changing the future

1. The primacy of identity
2. Living in a never normal world
3. Brilliant customer experiences
4. Push and pull of technology
5. Health and wellness
The primacy of identity
The primacy of identity
What it means for Gifts in Wills

- Less of a desire to give just to family
- Giving to charities and beneficiaries that represent people ‘like me’
- Dial up your communications to draw on the link with personal identity
- Ensure your brand and comms are truly diverse and inclusive
- Show how you share their values
KEEP YOUR REBEL SPIRIT ALIVE WITH GREENPEACE.

If you’ve cheered on as Greenpeace chased after whaling boats, scaled power plant chimneys and faced all sorts of danger to defend the natural world, why stop?

A gift in your Will can protect our precious planet and all the wonders it contains.

So go on. Keep your rebel spirit alive and stand up for what you believe in. Remember Greenpeace in your Will today.

To request more information, or arrange a call with someone in our team, please visit greenpeace.org.uk/rebel
Living in a never normal world
Living in a never normal world

What it means for Gifts in Wills

- Connect your donors to local services
- Sustainability will be the new ‘overhead’
- People may put off making long-term decisions and desire to spend money today could decrease long-term wealth
- Offer unique experiences to satisfy their desire to live for the moment
Save the Children’s Forced to Flee event
Health and wellness
Health and wellness
What it means for Gifts in Wills

- Communication overload risks people ‘switching off’ to your messages
- Utilise traditional forms of media to counter the digital noise
- Maximise volunteering opportunities to keep connected to older supporters
- Offer supporter experiences that focus on improving wellbeing while connecting to your cause
Mind’s pause box
Push and pull of technology
Push and pull of technology

What it means for Gifts in Wills

- Make use of AI tools to improve accuracy and efficiency of processes
- Maximise the value of human experiences
- Create immersive experiences to bring donors closer to the cause
- Balance the needs to capture data with the right of privacy
WWF VR Tiger Experiences

September 23
Brilliant customer experiences
Brilliant customer experiences
What it means for Gifts in Wills

• Focus on creating great donor experiences

• Identify and engage influencers who can spread your gifts in wills message

• Consider how you can connect your donors more directly to the change they are trying to make. Don’t be the middle-man they can cut out.

• Good stewardship will show donors who they can trust and who will give them the biggest impact for their gift.
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Initial ideas

- Choose one (or more) of the themes
- Jot down some ideas for new approaches… Could be a way of planting the GIW seed with supporters, new way of promoting GIWs to existing audience, a way to reach out to new audiences, a stewardship idea etc etc
- Jot down:
  - A headline
  - Max of three bullet points
- Looking for quantity rather than quality now

A reflective journal

- Supporters capture what’s important to them
- Helps them reflect on their lives
- Helps to bring meaning/wellbeing
Come up with a new idea to pitch in 2 mins

- Choose your favourite idea from amongst your team-mates
- Tell us:
  - What the core idea is
  - How it meets a donor need
  - Why it should be chosen as today’s top idea
Times change – motivations stay the same

A translation of the epitaph on Richard Hunt, Dean [1620–1638], whose marble altar stands before the Neville screen.

Here lies the hope of all the desolate.
The orphans' father and the widows' mate:
He taught the lame to walk, the blind to see.
The stranger's host, the poor man's fortress he.
But why, you ask, leaves he no legacies?
Why break this generous habit when he dies?
The reason's plain: he had given when alive
So largely that he had no more to give.
He lodged his all with Christ, a merchant wise.
That calm might be his journey to the skies.
[Who gives his all to God, we know it well.
Heaven's gate unlocks, & bars the door of Hell.] 
May every stranger pray, with us that love him.
'Soft lie his bones, light rest the earth above him!'
Thank you!