

# The future of gifts in wills

*Will*  
WONDERS  
NEVER CEASE.

IAC WEEK 4-10 SEPTEMBER



*Give a gift to the future*

**Legacy  
Futures**

# This session

1 Introducing this afternoon

2 Innovating well

3 5 key trends

4 Over to you

# This session

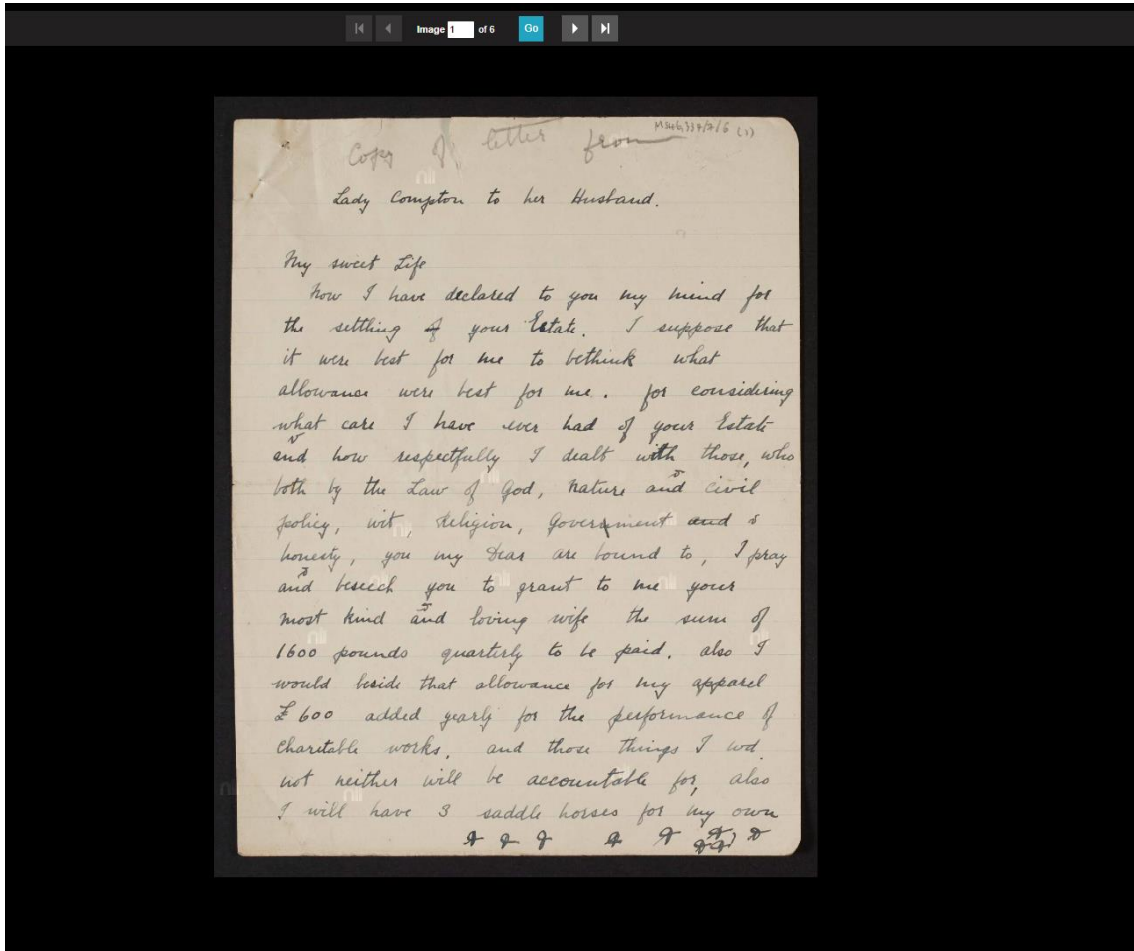
**1** **Introducing this afternoon**

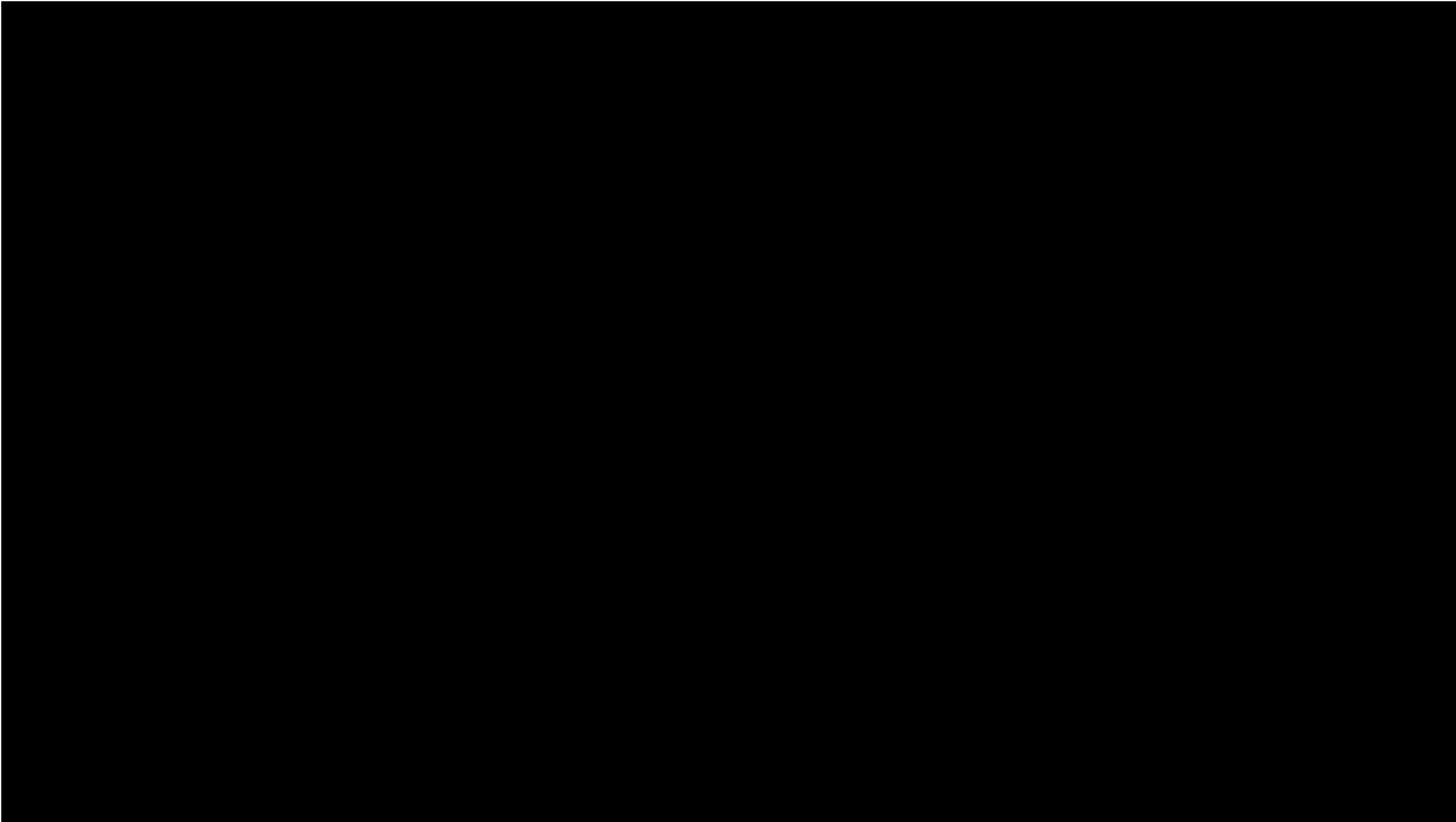
2 Innovating well

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# A masterclass in Gifts in Wills fundraising Downton Abbey style





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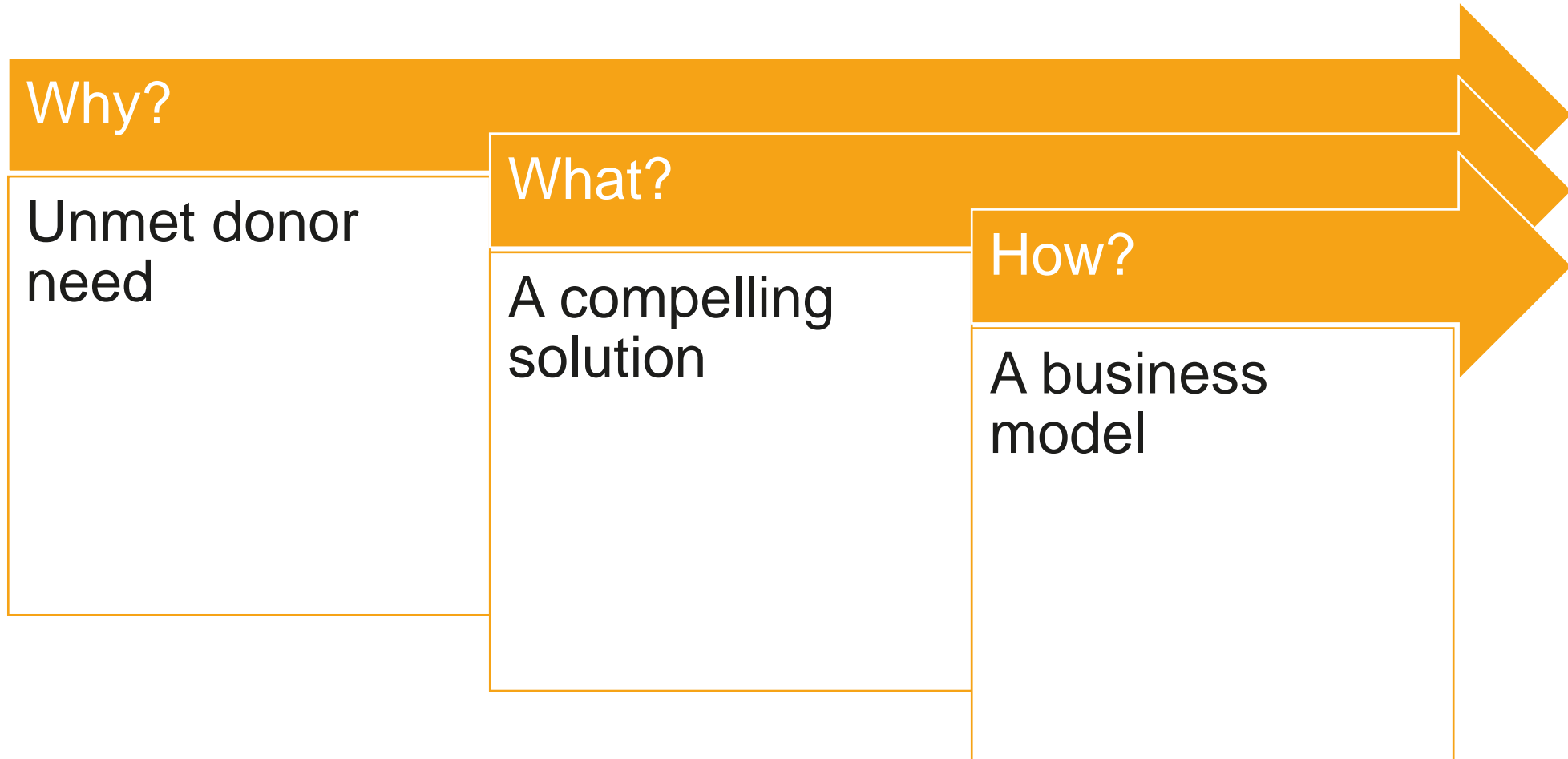
4 Over to you

# What is innovation?

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

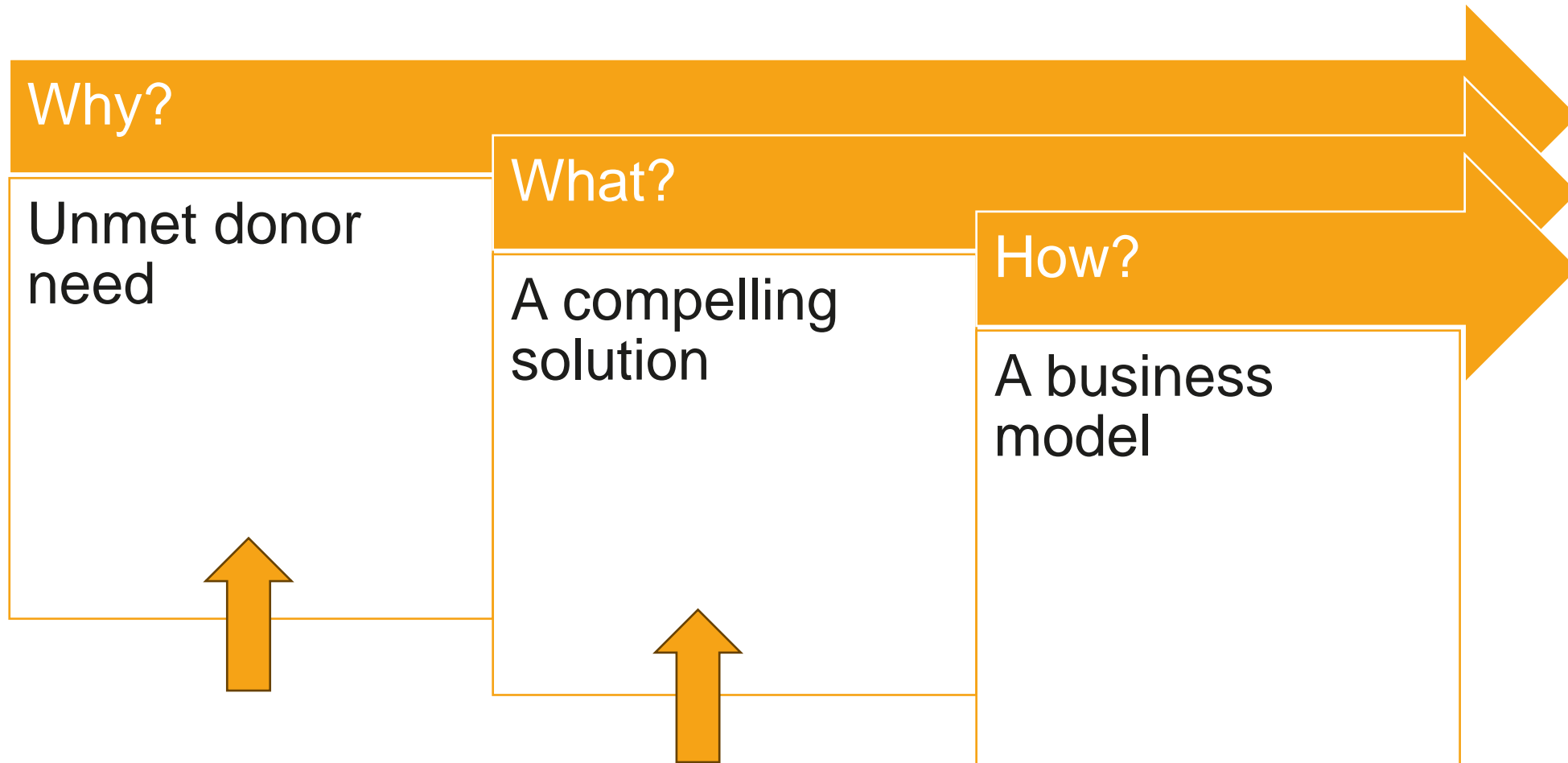
McKinsey 2022

# The process

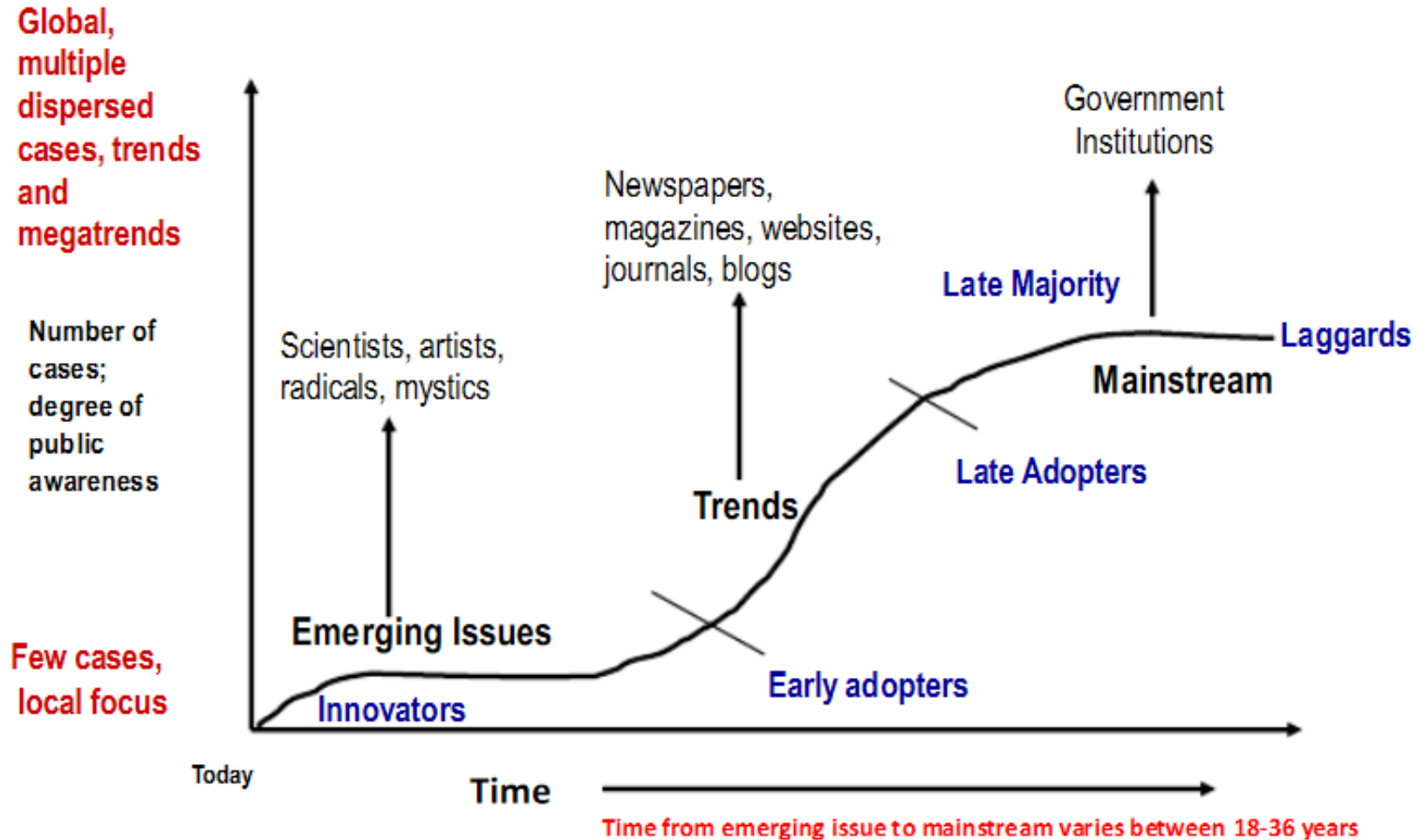




# The process



# Finding the unmet need: analysing trends



From Thinkingfutures.net

# Understanding the bigger picture

An iceberg floating in a dark blue ocean. The tip of the iceberg is above the water surface, while the much larger, jagged base is submerged. The image is used as a metaphor for understanding the 'bigger picture' of news and media.

**News items**

**Recurring themes**

**Underlying drivers**

**Mindsets,  
metaphors,  
worldviews, myths**

# This session

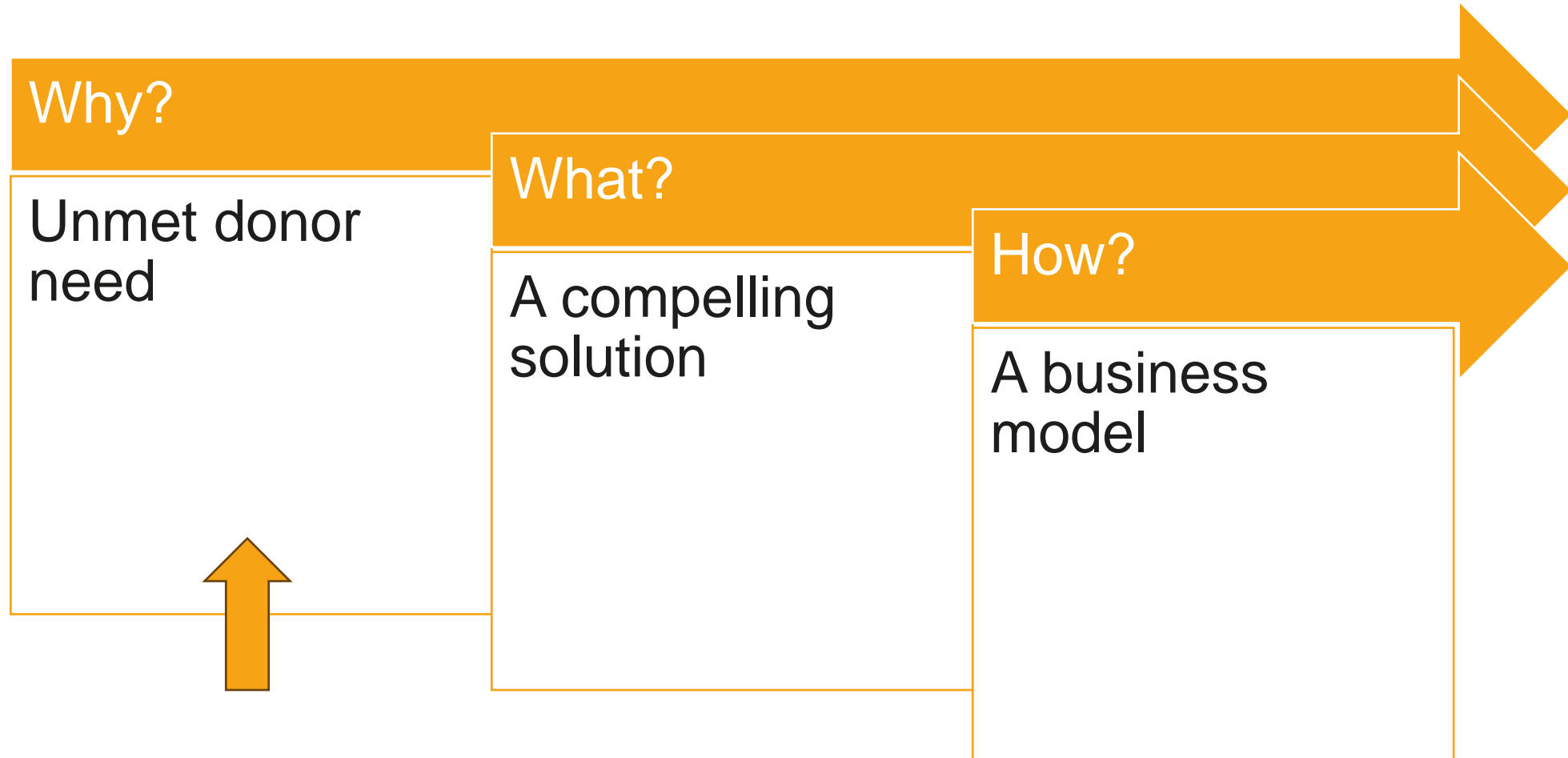
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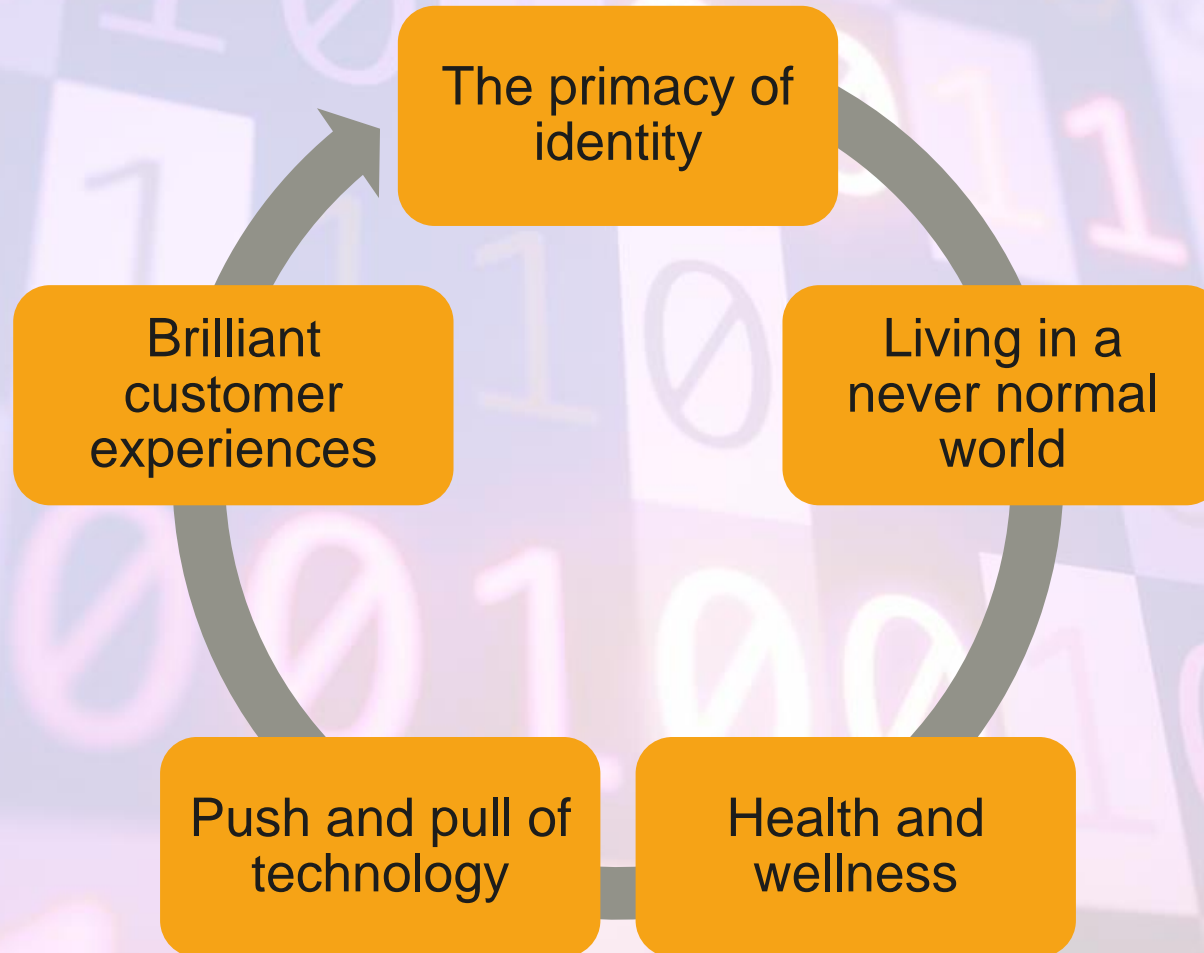
**3 5 key trends**

4 Over to you

# The process



# 5 trends that are changing the future





# 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](https://www.greenpeace.org.uk/rebel)

**GREENPEACE**

**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





# 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.

# RNLI – One Crew



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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

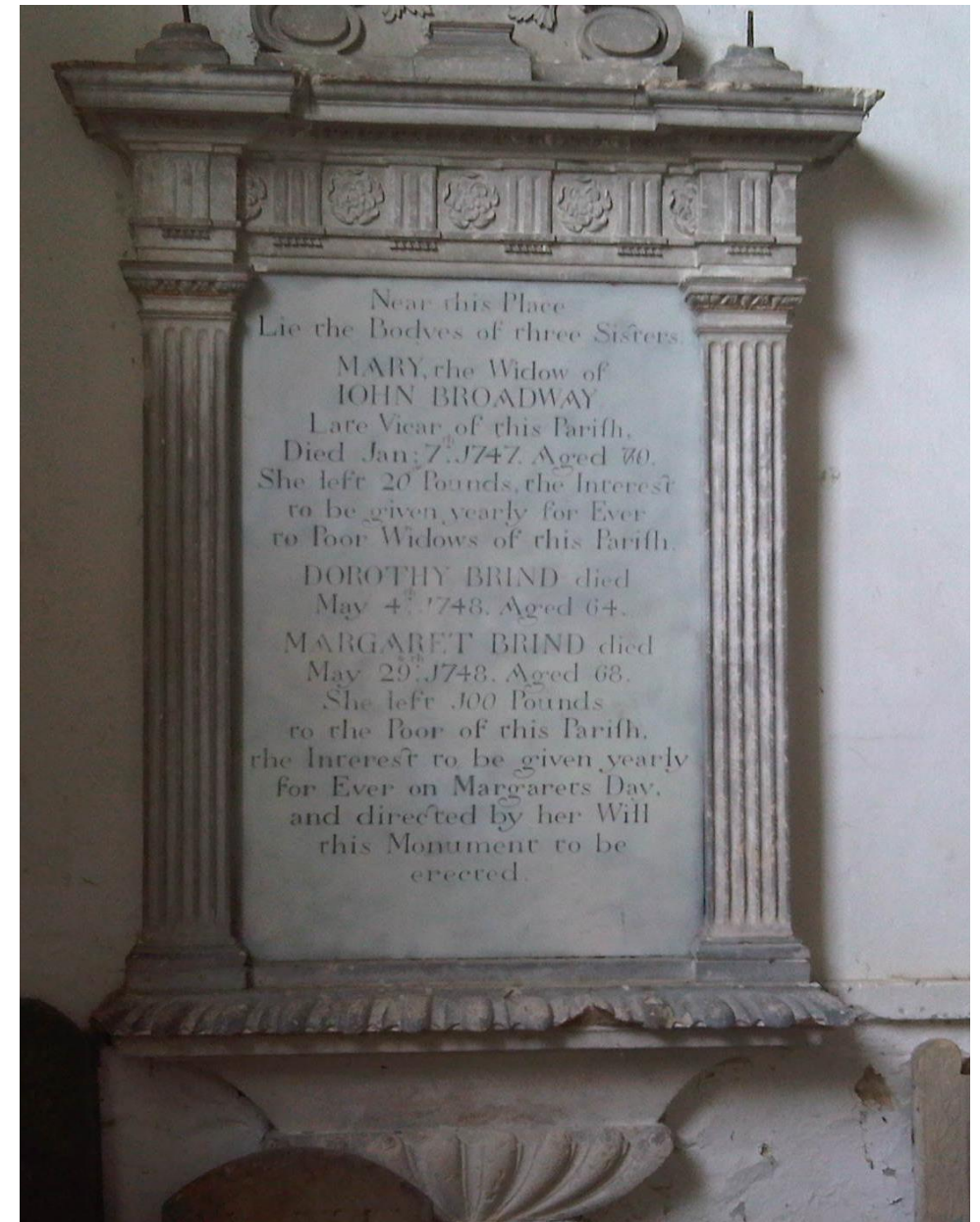
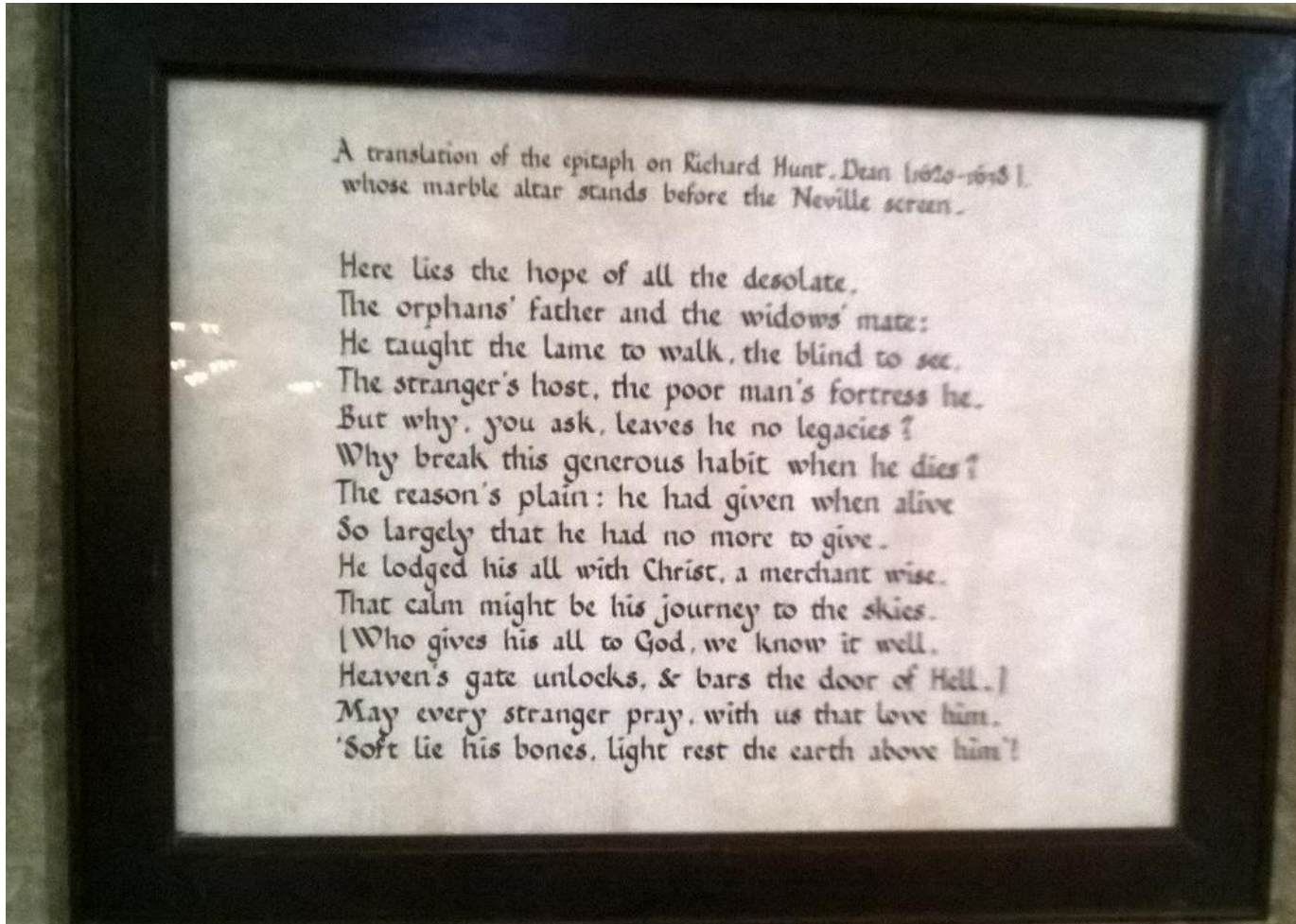
# Come up with a new idea to pitch in 2 mins

- 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





Thank you!

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