



“Make Each *Moment* Count”

today to improve financial life tomorrow

9/13/2019



Talk 2 10K toolkit

This toolkit gives you everything you should need to run a successful financial wellbeing conversation:

1. Your action plan
2. Suggested conversation agenda
3. FAQs
4. Social Media guide



Your action plan

It's up to you who you engage, and how you do it, but the below should help you make it easy to get things started

1. **Think about who** you know who would benefit from learning about women's financial life journey, and what group(s) might work well together.
2. **Think about the right location and time:** at home, café, sports centre, youth centre, church etc. – note you will want it to be quiet enough to hear the video material. To get the greatest impact you should aim to have your conversation during talk money week (12-18 November)
3. Log your conversation on the **Talk Money interactive map** www.fincap.org.uk/en/articles/talkmoneymap
4. **Think about how you position the conversation and invite people to it.** Depending on your group, this may be by email, social media or in person. You may want to start by inspiring them with one or two of the surprising statistics, to raise their curiosity, then offer to host a 30-45 minute chat where they can learn about what they can do personally to take control of their financial future.
5. **Take a photo or short video**, and check if your group is happy to have it shared on social media (see our social media guide), or encourage your group to share something about what they've learned using #MakeEachMomentCount and #insuringfutures
6. **Email** insuringwomensfutures@cii.co.uk to tell us you've had a meeting, how many people you engaged and if you have any video or photos or social media content to share

Do you have any groups of friends, such as sports or hobby groups, or extended family who would be interested?

This is critical. We need to generate some noise and visibility of these conversations



Depending on your audience, location, facilities and numbers you may want to flex the suggested agenda below, but this should give you a good starting point

Format for a Talk 2 10k event (smaller group)

Item	timing	Key points
Introduction & objectives	2 min	<p>Depending on who your audience is and how much you've explained to them in inviting them to this conversation, you may want to cover:</p> <ul style="list-style-type: none"> • Purpose: the conversation aims to share some enlightening, factual and impactful statistics that demonstrate the women's financial lives and specific resilience challenges, and to help people to identify where they may themselves be exposed Perils and Pitfalls themselves so they can help avoid or mitigate them • Let them know how long it's likely to take and roughly what you're going to share so they know what's coming. • If you and they are up for it, ask if they'd be happy to have a group photo or even a short video of the conversation and for it to be shared on social media so we can encourage more conversation
<p>Watch Women's Pensions life journey video</p> <p>AND/OR</p> <p>Narrated presentation</p>	5 min	<p>The Pensions Life Journey video walks through the pensions life journey through the eyes of two women: Sarah – a grandmother and Helen, her granddaughter.</p> <p>The Narrated presentation video explains the Perils and Pitfalls and the Moments that Matter with the data that supports them</p> <p>Depending on how and where you're having your conversation you may want to play this on a mobile, tablet or big screen. Make sure you have plenty of volume and not too much background noise</p>
Discussion	5 min	<p>After the video ends, get people thinking and sharing views, using some of the following starter questions:</p> <ul style="list-style-type: none"> • What do people think of the story? • Ask do you recognise yourself, a friend or family member in Helen's or Sarah's lives? • What different decisions could Helen or Sarah have taken to achieve a better outcome? • What needs to change in society to improve Helen or Sarah's outcomes? What can women and men do?
Discussion	5 min	<p>Start a constructive debate using some of the following questions:</p> <ul style="list-style-type: none"> • Which Perils and Pitfalls do the group find most relevant to their lives? • Which Moments that Matter are currently experienced by the group?
Hand out Financial Wellbeing Guide	15 min	<p>a) Walk through the guide – brief reference to data in life journey (2-3 minutes)</p> <p>b) 6 Moments that Matter – pick 2-3 depending on age & situation of group and walk through considerations (10-12 minutes)</p>
Next Steps	5 min	<p>a) Where to go for more information (Insuring Women's Futures website, find an adviser, Talk Money, etc.)</p> <p>b) How can you help others? Anyone you know who may need a conversation?, Could you become an ambassador?</p>



If you have an opportunity to engage a bigger group, for example colleagues at work, or a network event, you may need to consider a different approach

Format for a Talk 2 10k event (larger / mixed group)

Start with the same core assets and structure as the small groups, but consider playing the Narrated Presentation then either with the audience, in break out groups, or via a panel you could:

- Discuss what the Perils and Pitfalls mean to people’s financial lives
- Discuss the Moments that Matter, what employers can do.
- If your business is a consumer business you might also discuss what can be done to improve customer approaches.
- If you are arranging a session with customers you could ask their views on what could be done to better understand their needs.

Note: when we launch our proposals on 19 November we also plan to post online a narrated version of the launch presentation with our proposals and recommendations to improve women’s financial lives, benefitting men too. This will highlight the vital role of employers, financial services as well as wider policy, the third sector and financial guidance bodies.

You may wish to play this to your audience too!



We’ve tried to cover some of the more obvious questions below, but if you need anything else, just email us at insuringwomensfutures@cii.co.uk

FAQs

Question	Answer
Should I include boys and men in the conversation too?	Yes of course! We can only make real change together. But think about the structure of your event. We find that often the conversation with women and girls alone will highlight specific conversation topics that may not materialise in a mixed group. So how you approach your event will depend on the audience.
Should I have conversations exclusively with women and girls or mixed?	It’s up to you. Sometimes women and girls may feel more able to open up and share their experiences if they feel they are in an environment with just other women and girls. But men also have a role to play and can benefit from understanding a woman’s perspective. Avoid alienating men, but if you feel that your group would benefit from being single sex, perhaps explain why, and if appropriate, offer a separate chat with mixed / male attendees
Should I set up conversations or presentations at work or via a D&I or customer network?	If you would like to run a bigger event we would be delighted for you to do so. We have come up with some suggestions as to what you might cover on slide 4. Do make sure you have the necessary approvals to do so please.
Should I reach out to big groups, such as schools or youth groups	You can, but try to walk before you run. Talk To Ten Thousand is primarily focused on empowering ambassadors to talk to small groups of their existing close friends and family, rather than wider ‘outreach activities’. It can be very hard to organise with schools in particular, and will need careful preparation and planning. If you feel you have a really good opportunity to reach out to a large group, let us know via insuringwomensfutures@cii.co.uk so we can help co-ordinate.
What happens if someone wants specific advice, like what they should do with their pension	Unless you are qualified and authorised to do so, be careful not to provide personal advice. The purpose of this conversation is to encourage people to consider for themselves and take action, which might itself be to seek professional guidance.
Where can I point people for further support and guidance?	www.insuringwomensfutures.co.uk includes lots of additional resources in addition to the research. Go to the Resources section, where you’ll find dozens of independent links to non-commercial support and guidance, each aligned to one of the 12 <i>Perils and Pitfalls</i>
Do I need to have the conversation during Talk Money week?	Ideally we want as many conversations to happen during 18-22 November so that we can be part of a bigger national conversation. But if that’s not possible, or you have additional opportunities before then, that’s OK too! We want to reach as many women and men across society as possible to raise awareness and support securing our financial futures!



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We want to generate a big conversation. Help to inspire others to share their own stories and take control of their financial futures!

Social Media Guide

Take a photo – or even better a short video of you asking your group some questions from the guide and share it on Twitter, LinkedIn, Facebook, Instagram or whatever you feel most comfortable with



- #MakeEachMomentCount
- #InsuringFutures
- @fincapstrategy
- @CIIgroup

- ← This is our campaign strapline
- ← This is our ongoing group tag!
- ← Tweet the team at the Money and Pensions Service so they can share with Talk Money community
- ← Make sure you tweet CII so we can help share your content



Download the full ambassador's guide to Social Media from the LinkedIn group Insuring Women's Futures