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Q&A Session
27 October 2021

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What's Coming Up


- "What I feel like saying"
- Questions
- What's Next
- "What I feel like saying"



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“What I feel like saying...”



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Your Questions


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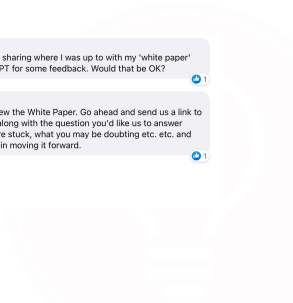
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Question - Sue Bell

 Susan Bell
Hi Suzi, I was wondering about sharing where I was up to with my 'white paper' that I have started to draft in PPT for some feedback. Would that be OK?
Like · 2d

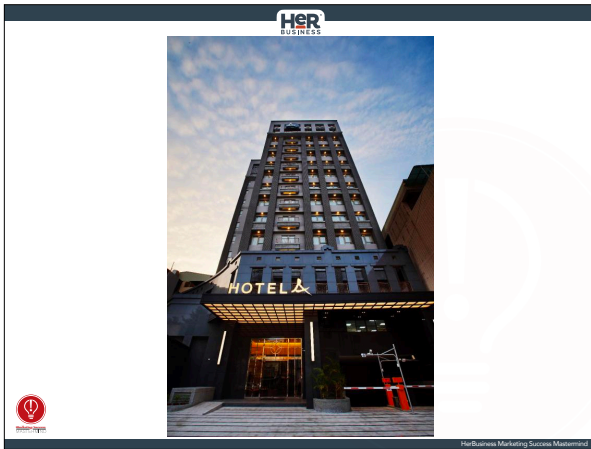
 Suzi Dattley Admin
Susan Bell Happy to review the White Paper. Go ahead and send us a link to it by Monday afternoon, along with the question you'd like us to answer about it e.g. where you are stuck, what you may be doubting etc. etc. and we'd love to support you in moving it forward.
Like · 2d

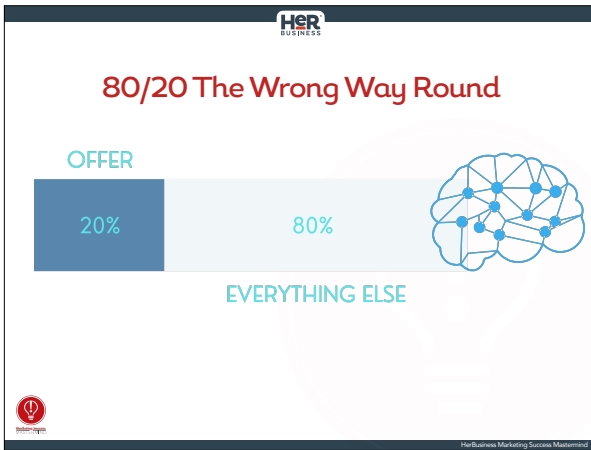
 Susan Bell
Will do, thank you.
Like · 2d

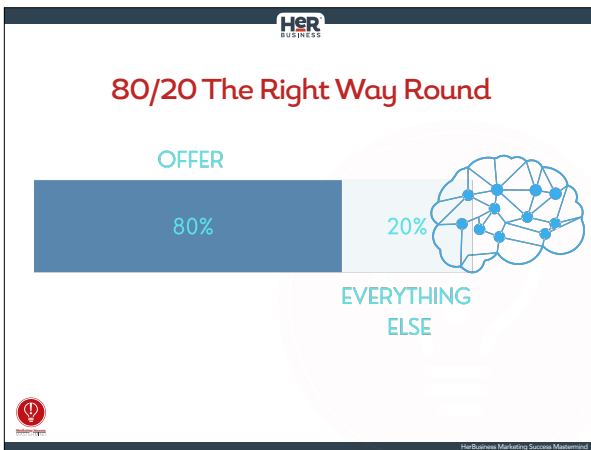


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Take this challenge:

1. Do you think of this generation as 'retirees' or 'baby boomers'?
2. Do you think of this generation as out of touch with technology?
3. Do you think that the 'good' retirees are the retirees who planned?

If you do any of these, I can help. Engaging with and communicating better with customers are the keys to growth for financial organisations. This means understanding customer segments beyond simplistic stereotypes, to empathise with people as they really are.

In this Insights Paper I share some of the key insights from our work with the baby boomer generation. Read on!



Think beyond labels

Think beyond the 'baby boomer label'

People argue about when the baby boom actually was but in Australia, the baby boom lasted roughly between 1949 and 1965. In 2021, these 'baby Boomers' are aged between 56 and 72.

images

But bear in mind that the Baby Boom in the UK and parts of Europe was much shorter. Roughly a third of people in this age group may not recognise themselves as Baby Boomers at all.

Some were teenage hippies, some were teenage Madonna fans

Only about a third of Aussie baby boomers were teenagers during the sixties. Some Baby Boomers were born during the sixties, coming of age in the early 1980's.

TIP: Avoid the term 'Baby Boomer' because it disguises decades of diversity and very different cultural references.



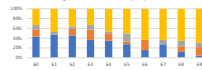
Think beyond labels

The old thinking about 'retirement' is no longer relevant:

- There is no 'retirement age'
- Retirement as a sudden step is no longer the norm

unfinished

Working and retirement for people 60 to 69



TIP: See the sixties as a time of transition in which people use this time to find meaning in their lives




This generation do use tech but

I have some data from ACMA that shows that almost every person over 65 has access to the internet and almost all have a smart phone

Plus some personas if I do the additional interviews – what devices people use, what apps, which are age-friendly for example

images




Data on retirement planning

This section would be data about who plans for retirement. (hardly anyone is the short answer)

Mix of % data and some personas if I do the additional interviews


images



Could include:
Life gets better with age

Average	Under 40	41 to 59	60 to 64	70 or over	65 to 69
How much are you enjoying this time of your life? Drag the bar to show us how much you are enjoying this time (100 is the most) - How much you are enjoying this time of your life		tbc	64.7		69.2

Total sample: 1000
Multiple comparison correction: False Discovery Rate (FDR) (p = 0.05)



Could include – ageism in the workplace
Have you ever experienced any of these?

	Male	Female
Feeling too old at work	11%	15%
Looked down on at work because of my age	14%	11%
Appreciated at work because of my age	13%	11%
Discrimination based on age at work - e.g not getting a promotion	12%	12%
Something else?	5%	3%
None of these	62%	63%
Don't know	1%	4%



tbc





White Paper

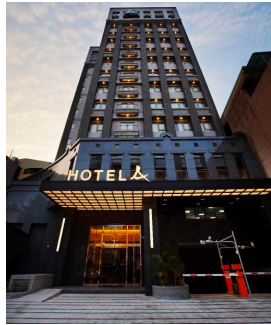
- Avoid "you're wrong" / "younger marketers don't understand"
- Myths
- Speak more to your avatar's issues eg:

Context: Highly competitive marketplace. A lot of legislated change expected in 2022. It is a 'growth' market.

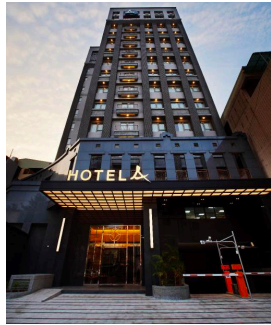
- Paint the OPPORTUNITY of having this knowledge
- CTA - what's the very next step?



Don't Over Invest in The Hotel!



Once it's Built Fill it Every Night



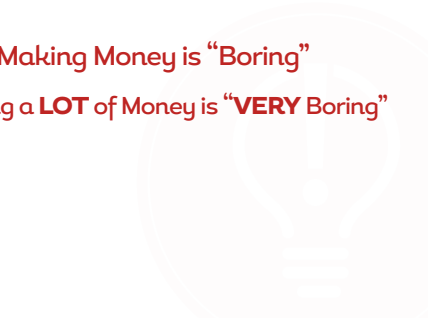
Making Money is "Boring"



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Making Money is "Boring"

Making a LOT of Money is "VERY Boring"



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Question - Seona Roberts

Like · 2d

Seona Roberts

1. I do! When running a challenge as a lead up into membership...what can be done for participant engagement and to encourage them to join (by membership)? I'll be running my 5 day square a day challenge from the 6th November and intend on having a new square each day for 5 days that comes with a written pattern and video video tutorial that will be emailed to them daily. There will be a facebook group that is for participants only and will be open from the 1st Nov **unless there is a best practice for when to let them in**. I was intending on having an email sequence that started from sign up and then a preparation one up to a week before, a few days before and the day before it started, then each day of the challenge. Doors open to the membership will be from the Thursday night of the challenge. Doors open to the membership will be from the Thursday night of the challenge for 4 days. I was planning on going live in the group each evening to motivate and cover a new problem each day. I was also going to have scheduled posts for each day of the challenge to encourage participation by having them post photos of their squares. The group will be closed after the challenge ends - probably the same day as doors close to the membership.

2.

3. Do I need to give prizes? I had thoughts of mimicking the membership yarn draw at the end of the challenge - which is a random draw for participants to enter that wins them a voucher for yarn that is equivalent to 2 months membership - or should I keep that out of the challenge and give them a bonus entry into the monthly prize draw if they join the membership. Should there be daily prizes? Anything else I can do to make them love me and what I do and make them want to join the membership afterwards?

4. 5. 6.


I know - lots of questions, but they don't all have to be answered specifically. I'm really just looking for guidance for what I should do to get them to participate and convert.

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Ask for Support Early



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Your Content

- Seed the Membership
- Tell client stories
- It's NOT about the data
- What is the problem/solution dance you are doing with them?
- Build the relationship with YOU and with each other
- How is membership the next step?



Give them the EXPERIENCE

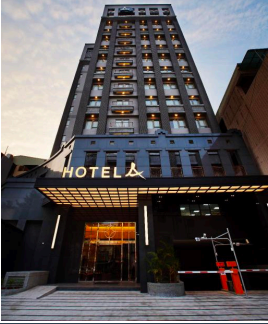


Prizes?



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You're Right to Focus on Filling It



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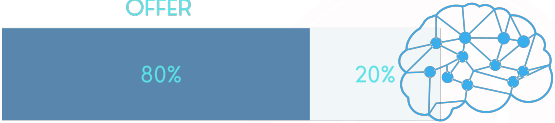
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80/20 The Right Way Round

OFFER

80%



20%

EVERYTHING ELSE

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Who Are The "Grant-Writers?"

Hi and welcome!

I help overwhelmed grant-writers crack the code on **high-value grant-writers** which stand out and get funded. They achieve their big and little dreams sooner through my online course, a supportive membership community and mentoring options.



LET'S GET STARTED

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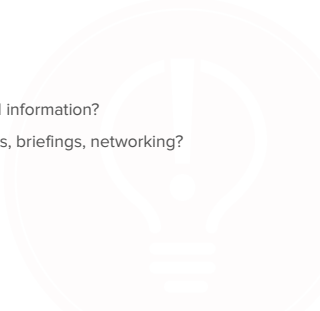
Who Are The “Grant-Writers?”

- What are they...
- Reading / Watching?
- Joining?
- Doing?



Who Are The “Grant-Writers?”

- Where are they...
- Looking for grants?
- Getting qualifications and information?
- Gathering for conferences, briefings, networking?



Who Are The “Grant-Writers?”

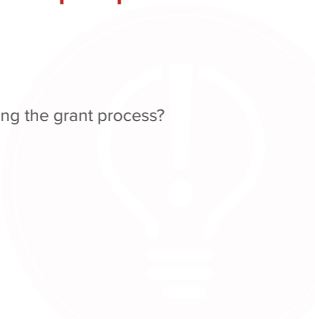
- Who are they...
- Asking for help?
- Reporting to?
- Being supported by?




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Get More Specific

- Example - Sports Clubs
- What is their “trance?”
- Who is likely the one driving the grant process?



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Case Study



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Case Study





Our program supports over 10,000 community sporting clubs across Australia to provide a safe and welcoming environment where everyone can get involved.

[FIND OUT MORE](#)

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How and Where To Use - OWNED



Publications

- Newsletters
- Proposals
- Lead Magnets



Presentations

- Webinars
- Live Events
- Trade Shows
- Customer Service**



How and Where To Use - EARNED



Suppliers

- On THEIR sites
- In THEIR newsletters
- On THEIR social channels



Industry

- Peak Bodies
- Industry Associations
- Not for Profits
- Other Groups



How and Where To Use - PAID



Social Media Ads

- Online
- Industry Publications
- Where do your clients hang out?




Trade

- Trade Shows



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Where else could Tracey use Cases Stories?




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Announcements

- Friday Check-ins
- Next Workshop (3 Days) - 24 - 26 November (includes a PLANNING DAY!) will be Virtual
- NEW Masterminders!




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