



'Generation Un-fucked'

A COMMUNICATIONS STRATEGY TO TRANSFORM IMPACT INVESTING IN 2020

From: Nicholas Wright & Will Peters, Sentio Group
To: Rt Hon Joseph Muscat, Daniil Koslov & colleagues
Date: 16th June 2020.
Re: Narrative Development

Dear Daniil, Joseph and senior team,

Thanks for your time last week – It is truly inspiring to hear about your vision, values and the vehicle to transform Impact Investing in a single generation. The gap in the market – only 0.4% of funds coming from family offices today – is real. Our goal is to turn those values into a compelling and credible *story*, which will turn '*persuadables*' into Partners.

Here's what we'd suggest.

Objective – Strategy – Tactics:

Firstly, it is an invaluable exercise to sort your Objective from your Strategy, and the Tactics you will use to achieve it. In a world *dominated* by Volatility, Uncertainty and Confusion, you have identified a *yawning* gap: Some \$5-7 trillion, to be imprecise, needed to achieve the UN's Sustainable Development Goals. This in spite of a *surge* of interest in Impact Investing and Donor Advised Funds. You must dare to be different.

Simply put, your core Objective is being the *catalyst* that matters amongst the noise.

Communicating how and *why* that is the case will be the cornerstone of your strategy. We are profoundly emotional beings, which is why **people buy stories, not 'key messages'**. Therefore, we will need to help you construct a *narrative* that *connects* people across boundaries of background, ideology and geography. And while that must be constructed on foundations of *aspiration* and *authenticity*, it will be drawn from robust research and data.

You will be exposed to many vocal '*Partners and Investment Philosophies*'; myriad multicultural backgrounds. What will unite them will likely be a focus on **results**, over *process* – and the **personal**, not the *ideological*. These principles will inform the first stage of the work, as you build '*digital bridges*' with other, like-minded visionaries who dare to *change our future*.



Research:

We understand the key 'deliverables' for this project to be:

- ✓ An **actionable Language Lexicon** to demonstrate your most compelling *narrative* – the story we must tell advocates and potential supporters – from start to finish.
- ✓ Clear, **concise recommendations**, a 'How To...' guide for talking about your motives, aspirations and potential partners *themselves*.
- ✓ **Content** that truly **emotionally connects** with potential partners, supporters and members.
- ✓ Other useful **messaging guidance** for other, high-level staff, drawn both from this, unique research, and our other experience in the space.

Methodology:

Forewarned is forearmed. This is why research is at the heart of everything that we do. But it is best used as a *navigational tool*; it cannot tell you *what to think*. That is why the first component of a three-phase research program must be to *clarify* your thinking.

I. Top-team Deep-dive qualitative session:

We will spend 90 minutes to 2 hours guiding you, and your senior leadership, through a carefully-structured conversation exercise. This will be specifically designed to elicit answers to the big, strategic questions.

Who do we want to join this community, *first?* ...Who can *not?* Is our priority *future generations* – or *justice today?* (i.e. Can you foresee the Club/Platform existing in 30-40 years, or should it have achieved its purpose by then?) The output here will provide us with some clear options for testing more broadly, and with a wider audience.

II. Quantitative Benchmarking exercise:

While you may not necessarily be influenced by '*mass opinion*', those that you will need in order to be successful most assuredly *will be*. Therefore, we would propose a short, succinct piece of confidential research – Both to give *intelligence* about fast-shifting opinions in this space; as well as to offer an opening to your first wave of potential partners. The results would thus provide an '*intro*', as well as an *opportunity to brief your targets*. (This is an approach we have seen work well with, for instance, the Climate Leadership Council in DC).

An in-depth (40-60 question) quantitative instrument, blending repeat questions on your suggested approach, as well as to specially-designed *creative stimulus* – images, visuals and videos – that will bring your story to life.

III. Depth Interviews:

To complement the iteration, we'd recommend holding a series of Depth Interviews – structured conversations with key stakeholders around the people you would want to take part in local 'chapters'. Representatives of family offices, philanthropic foundations, media and corporations.

We would envisage hosting, perhaps, a dozen of these initially, then reporting back to the Board for feedback and 'steering', before completing a further round of 10-12 confidential discussions. Preparation of full recommendations and first steps for *action* would then follow.

Sequencing:

Using the research, we will identify the biggest 'blockers' for priority targeting. Then we would propose targeting by **geography** – Systematically expanding from China and *Eurasia*, the *Middle East*, to *North and Latin America*. Depending on your view, we could use briefings on the research as a gateway to new potential partners.

Using a country-by-country approach, we would expect to use events (and publicity) to maximise the sense of **community** and **experience**, so critical to building *engagement with your audience*.

A final word:

If you're looking for 'standardized' market research... There are others who can do it for you.

But if you're looking for a deep understanding of the evolving priorities of the market in 2020, a comprehensive strategy to tell the story of the Fund, Franchise and Platform idea ... And – most importantly – the *precise* words, phrases, and visuals that will position you perfectly with UHNWIs and Family Offices... Then we have the best team, the right expertise, and the most effective methodology for this project – period.

We know how to shape public opinion – Our firm is *steeped* in it. And we know the caliber of your top team. We're prepared to dive into this challenge head-on and deliver a *narrative* that will equip you to navigate through the challenges and opportunities that are coming – in a way that builds credibility, trust and *opportunity* right when it is needed the most.



This promises to be one of the most important projects we undertake this year – and we can't wait to get started.

Yours sincerely,

**Nicholas Wright & Will Peters,
Partners**