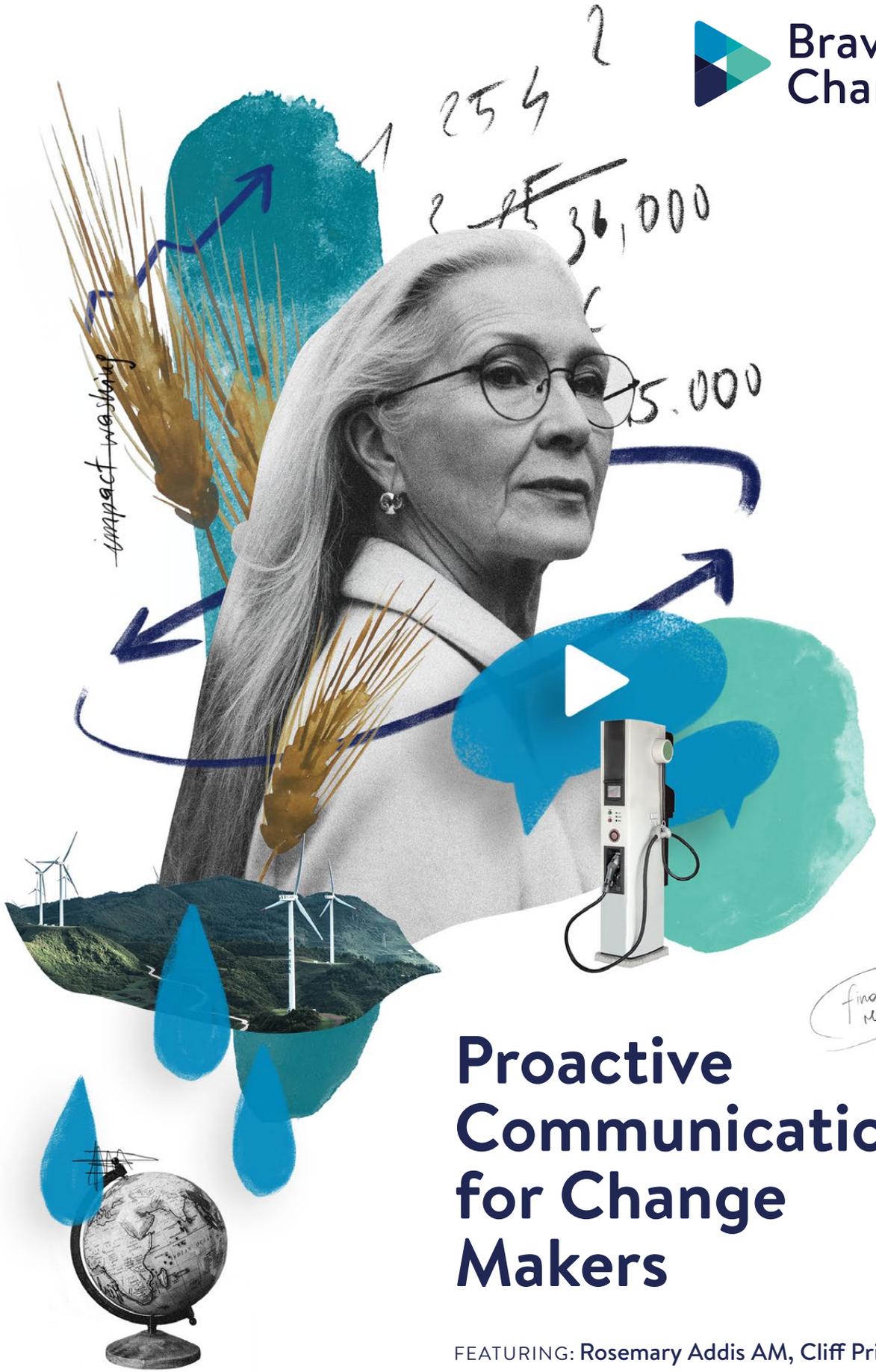




Bravo
Charlie®



Proactive Communication for Change Makers

FEATURING: Rosemary Addis AM, Cliff Prior
Philip Bateman, Ryan Babbage, Kadi Morrison,
Adam Friedman & Dr Catherine Brown OAM

How to use this document

This guide has been designed in five sections: a broad overview of the impact investing industry and the challenges it faces, followed by practical solutions, case studies, and the steps you can take to inspire action.

If you're new to impact investing or seek a summary of the latest industry trends, we recommend starting at the beginning of the document.

If you are an industry leader ready to take a new approach to engage your stakeholders, skip ahead to the practical steps, read the case studies for inspiration and contact us to begin making a real difference to the way you communicate.

The Impact Investment Industry in 2021/22

The Challenges for Change Makers

A Proactive Solution

Case Studies

Practical Steps

Thank you to our contributors and sources:

Rosemary Addis AM, Cliff Prior, Kadi Morrison, Adam Friedman, Ryan Babbage and Dr. Catherine Brown OAM.

Impact Investing Australia, the Global Impact Investing Network, Sir. Ronald Cohen, Australian Advisory Board on Impact Investing, Operating Principles for Impact Management, Money Management, USA Today, Harvard Business Review, AMPCapital, Nesta, HubSpot, Psychology Today, Wyzowl, InsightDemand and McKinsey & Company.

Authored by Katrina Strathearn and Philip Bateman. Designed by Denise Lackner.



I hope this finds you well.

As our species faces unprecedented biological, ecological, financial, technological and social change, we are delving further into the chaos of unravelling systems thinking, legacy infrastructure, deeply rooted ideologies and the brinkmanship of nation states.

This parallels with the implicit opportunities of a fintech, emerging market, shareholder activist and renewable energy renaissance.

Where Covid laid waste to business as usual, it massively accelerated technology adoption and led us to a moment in history where high quality video is the new normal for business communication.

For you and I as visionary change makers, these converging macro trends present the opportunity to engage values driven investors at individual, fund and government levels.

Through leveraging digital technology and engaging storytelling, we can radically transform the way capital is directed and used to enrich our lives, cities and societies.

As my life's work, Bravo Charlie is the vessel through which my team and I shape reality, and I welcome you to join us on the journey. Read on!



PHILIP BATEMAN
Managing Director, Bravo Charlie



Contents

Executive Summary	5	Case Studies	23
The Impact Investment Industry in 2021/22	6	Real-world implementations, their challenges and success	
The Challenges for Change Makers	10	Uniting Care Werribee Support and Housing	24
Global adoption of a shared language and impact measurement standards.	11	University of Surrey	25
Cutting through 'impact washing'.	12	Kilter Rural	27
Dispelling the misconception that 'doing good' means sacrificing financial returns.	13	Circular360: The Global Centre of Excellence in Circular Economy	28
Creating opportunities for meaningful stakeholder engagement.	15		
Attracting investors with the right values.	16	Practical Steps	29
Driving awareness of impact investing to make participation easier.	16	Know and articulate your purpose.	30
		Understand your place on the impact investing spectrum.	31
		Design a communication strategy.	31
		Automate communication tasks.	33
		Establish a regular content calendar with video at its core.	35
A Proactive Solution	17		
Making standardized measurement frameworks meaningful for humans.	18	Next Steps	36
Using video as a primary communication tool.	19	About Bravo Charlie	37
Prioritizing emotive, story-led content to drive connection.	21	References	38
Integrating content production into regular reporting schedules.	22		



Executive Summary

COVID-19 has exposed social, economic and environmental inequalities - the recovery plan for which provides a perfect stage for Impact Investors to take the lead. To this end, the Global Steering Group for Impact Investment (GSG) have created a 'call to arms' to G7 and G20 Leaders, Finance Ministers and Central Bank Governors via the '[Leaders' Declaration for a Just and Sustainable Future](#)' asking them to place impact investing at the heart of their economies.

Fortunately, increasing numbers of ethically minded investors want to go beyond investments that avoid doing harm to people and the environment, to funding opportunities that make a positive difference to the world. At the same time, organizations leading these opportunities are working to drive capital towards their projects to make meaningful progress. While this seems like a perfect scenario, a combination of media noise, market pressures, insufficient government support and ineffective measurement, management and communication methods are failing to bring these two parties together quickly enough.

Currently, the impact investment industry is estimated to be worth \$USD715 billion worldwide², and while growth is occurring, it is being limited by numerous challenges.

- Traditional institutions require larger investment opportunities than are currently available to meet risk and return requirements.
- Social entrepreneurs and not-for-profits managing large investment opportunities lack the confidence and knowledge to enter the impact investment industry.

- The industry is still working towards the adoption of globally agreed Impact Measurement and Management (IMM) standards and a shared language that allows participants to shape targets, guide investor expectations, evaluate impact and communicate with stakeholders.
- The practice of 'impact washing' is causing scepticism about the authenticity of investments labelled 'Impact' or 'ESG', making it harder for genuine impact projects to secure investors.
- The long-standing myth that 'doing good' means sacrificing financial returns when in reality, market-rate and above market-rate returns are regularly being realised.
- Impact organizations are struggling to create opportunities for meaningful stakeholder engagement beyond traditional financial reporting.

A solution lies in re-aligning communication practices to meet the broad information needs of stakeholders and the dual profit and purpose nature of impact investing. This means augmenting traditional reporting to engage stakeholders with emotive, meaningful video content that captures human stories. A number of straightforward steps make this achievable for participants in all facets of the impact investing industry.

Through a broad study of the available research, this hybrid whitepaper and guide provides you with context into the current state of the global impact investment industry and offers an evidence-based approach to crafting an effective, video-centric digital communication strategy to meet your organizational growth goals.

1. Global Steering Group for Impact Investment. *Leaders' Declaration for a Just and Sustainable Future*.

2. Hand, Dithrich, Sunderji & Nova. (June 2020). *2020 Annual Impact Investor Survey*. Published by the Global Impact Investing Network (GIIN).



An aerial photograph of a river meandering through a vibrant green landscape. The river is a deep teal color, contrasting with the surrounding lush vegetation. The terrain appears to be a mix of grassy fields and possibly some water bodies or wetlands. The overall scene is bright and natural.

The Impact Investment Industry in 2021/22

“

“Impact investing is a growing field helping to finance solutions to some of society’s biggest challenges.”

IMPACT INVESTING AUSTRALIA³

Our world faces complex issues that traditional commerce, government, philanthropy, and not-for-profits have struggled to solve for decades. Ongoing problems such as housing affordability, environmental sustainability, aged care, renewable energy, unemployment, sustainable agriculture, microfinance, and arts development require innovative solutions paired with innovative funding models. The impact investing community has stepped into this space by using traditional investment instruments and a philosophy that joins profit and purpose to bring vital projects to fruition.

Defined simply, an impact investment finances organizations, projects or funds which exist to produce financial returns together with measurable social or environmental outcomes. Impact investing aims to harness capital to fund projects that do good and accelerate innovative activity to achieve impact on a social and environmental level at scale³.

The term 'impact' implies how much an action benefits people and the planet. Unlike other forms of responsible investing, it goes beyond minimising harmful outcomes to actively creating positive ones.

Since launching on the financial market in the mid-2000s, impact investing has grown into a multi-billion-dollar global industry worth an estimated **\$USD715 billion**². In Australia, a [report by the Australian Advisory Board on Impact Investing](#) estimated that the market could grow to \$AUD32 billion by 2023⁴.

Impact investment funding is obtained through corporate investors, philanthropists, retail investors and consumers, crowdfunding platforms, family offices, foundations, and major investment managers including BlackRock, Goldman Sachs and Credit Suisse. Investments are now available across all asset classes: deposits and cash equivalents, private debt, publicly-traded debt, equity-like debt, private equity, public equity and real assets⁴.

Despite financial repercussions from the COVID-19 pandemic, respondents to the **2020 Annual Impact Investor Survey** by the Global Impact Investment Network² remain positive about the future of the impact investment market, with 69% stating that it is growing steadily and 21% believing that it is "about to take off".

The steady growth of the impact investing industry is being nurtured by committed stakeholders from a diverse set of sectors:

- **Asset Owners:** institutional investors (pensions, insurance companies, mutuals, development finance institutions, sovereign funds), philanthropies and family offices
- **Asset Managers:** commercial banks, private equity and venture capitalists, non-banking financial companies, wealth managers and specialised intermediaries
- **Entrepreneurs:** entrepreneurs leading for profits, B-Corps, co-operatives, non-profits, and crowdfunding platforms
- **Market Builders:** research and consulting firms, measurement and audit firms, law firms, incubators and accelerators, and professional services organizations
- **Government, Regulators & Policy Makers:** government, quasi-government, policy and regulation bodies, political institutions and multilateral organizations
- **Media:** broadcasters, journalists and reporters across offline (television, cinema, radio) and online media (websites and social media)
- **Academics:** students, academics and researchers
- **Consumers:** retail investment buyers, superannuation account holders

Each of these sectors participates in impact investing in ways that are meaningful to them, but with one commonality - the desire to balance financial gains with large-scale positive change in our world. This motivation is both what fuels momentum for the industry and what sets it apart from traditional financial markets.

2. Hand, Dithrich, Sunderji & Nova. (June 2020). *2020 Annual Impact Investor Survey*. Published by the Global Impact Investing Network (GIIN).

3. Impact Investing Australia: <https://impactinvestingaustralia.com/>

4. Australian Advisory Board on Impact Investing (2017) *Views from the impact investing playing field in Australia on what's happening and what's needed next*.



The investing spectrum below demonstrates where participants in the industry lie: they may be considering realigning their commercial capital to be impact-focused, require a model of funding that sits outside of grants and philanthropy, or be leading the charge building a business with an impact mandate.

In all cases, 'Impact' is a lens through which to view investments, it is a dimension necessary to consider, plan for and report against in the modern day.

The [2020 Annual Impact Investor Survey](#)² found the top three 'very important motivations' for making impact investments are:

- 1) impact is central to their business mission,
 - 2) it fulfils part of their commitment as responsible investors, and
 - 3) it is an efficient way to meet impact goals.
- While respondents reported that investments are meeting or exceeding their financial expectations and market-rate returns are now being realized, they only valued the financial attractiveness of impact investing as 'somewhat important'.

Evidence suggests that the growth of impact investment is dependent on increasing the scale of both investments and impacts.

This is challenging as institutions such as superannuation funds and institutional investors, require large investments that meet their risk and return requirements, while social entrepreneurs and service providers (profit or non-profit) lack the knowledge, confidence and support they need to engage in impact investing⁴.

Depending on where you in the spectrum, you may be considering realigning your capital to be impact focused, or you may be building a business that requires funding and will fit well with an impact mandate. Alternatively, you may already be engaging in a communication balancing act of convincing investors from traditional markets of the profitability of impact investments, whilst attempting to satisfy the ethical and financial motivations of existing stakeholders, with accurate and clear reporting of outcomes.

Whatever your place in the Investing Spectrum, you are likely aware of the collective need to collaborate on broader educational activities that attract larger initiatives to the industry. Our suggestion is that leaning into sharing your story with the world and the impact of the work you are doing, will contribute to amplifying the importance and effect of Impact Investing.

Applying the Impact Lens to the Investing Spectrum



2. Hand, Dithrich, Sunderji & Nova. (June 2020). *2020 Annual Impact Investor Survey*. Published by the Global Impact Investing Network (GIIN).

4. Australian Advisory Board on Impact Investing (2017) *Views from the impact investing playing field in Australia on what's happening and what's needed next*.



“Impact investing is certainly at an inflexion point, where more and more asset managers and asset owners are doubling down on impact approaches. But the majority of people working in finance and government still lack knowledge in this field. The situation is complicated by different meanings of “impact” - are we talking about intentional impact investing or measuring the positive and negative impact of all investments? And also by outdated information such as that impact investment must be concessionary.

“

So, what are the solutions? We see the value of a clear vocabulary to be distributed through the most relevant channels such as Investopedia; a set of impact investing examples across relevant asset classes and themes; and widely distributed training, for example, the upcoming Duke University programme due in the autumn through Coursera.

Impact measurement and management are fundamental to success: credible, shareable data is essential. We still have a confusion of different IMM approaches which is holding back progress and raises a risk of impact washing.

The Impact Management Project is bringing the main standard-setters together for greater clarity, regulators are setting standards and taxonomies for example in the EU, and impact accounting is developing through the work of the IFRS Foundation. Transparency is improving through mandatory disclosures, and also through impact accounting initiatives such as IWAI and VBA. The G7 has supported an Impact Taskforce which includes work on harmonisation of standards and the development of values based accounting.

It is now time for a coherent and readily usable system across standards, taxonomies, reporting, disclosure and transparency.”

CLIFF PRIOR

Chief Executive Officer, The Global Steering Group for Impact Investment (GSG)



Cliff Prior is a leader in transformational change and strategic development, for organizations that strive to solve social and environmental problems, by empowering and supporting the people affected.





The Challenges for Change Makers

The growth in impact investing is not occurring without challenges, particularly around communication and stakeholder engagement.

Global adoption of a shared language and impact measurement standards

The dual profit and purpose nature of impact investing requires the use of standardised measurement tools and language that sit outside traditional financial reporting. In his book *Impact: Reshaping Capitalism to Drive Real Change*⁵, Sir Ronald Cohan aptly described impact measurement as a navigation system that guides the impact investing vehicle towards social change.

However, the industry is yet to agree and adopt a global set of tools to consistently manage and measure social and environmental impact. The resulting lack of clear, comparable data is hindering growth on an organizational and industry level, and in turn social and environmental change.

In the early days of impact investing, the absence of industry-mandated standards led many impact investors to create their own IMM (impact measurement and management) tools. The GIIN² reported that over 85% of impact investors in 2010 used a proprietary IMM system. This lack of consistency meant that:

- It was difficult to set benchmarks for impact success, nationally and globally, making it challenging to manage investor and stakeholder expectations appropriately.
- Investors were unable to compare the attractiveness and viability of investment options in terms of expected financial return and impact, and the relationship between the two.
- Impact projects struggled to engage and communicate successes effectively and consistently with different stakeholder groups.

These issues continue to be a pressing concern for the industry as revealed by [The 2020 Annual Impact Investor Survey](#)², which asked respondents to indicate the three greatest challenges they anticipated the industry to face over the next five years. While the first was ‘impact washing’, the second and third most pressing challenges were identified as the ‘inability to demonstrate impact results’ (35%) and the ‘inability to compare impact results with peers’ (34%).

Fortunately, progress is being made. There are dozens of impact assessment efforts across the world, all approaching impact measurement from a different perspective, including the Impact-Weighted Accounts Initiative (IWAI) - a joint initiative by the Global Steering Group for Impact Investment (GSG), the Impact Management Project (IMP) and Harvard Business School.

In the last ten years, the GINN² reported that, by and large, the industry has been primarily using three categories of tools:

- **Shaping impact targets:** there is now widespread use of the United Nations Sustainable Development Goals (SDGs) as a framework to guide both target setting and impact measurement practice by mapping investments to the SDGs. Furthermore, in 2019 the IFC introduced nine [Operating Principles for Impact Management](#)⁶. These principles are now gaining significant commitment from the industry.
- **Measuring and optimizing impact results:** The IRIS+ system offers over 600 standardised metrics to measure, manage, and optimize impact results and is used by 36% of the respondents to the [GINN 2020 Annual Impact Investor Survey](#)².

2. Hand, Dithrich, Sunderji & Nova. (June 2020). *2020 Annual Impact Investor Survey*. Published by the Global Impact Investing Network (GIIN).

5. Sir Ronald Cohan (2020) *Impact: Reshaping Capitalism to Drive Real Change*.

6. IFC. *Operating Principles for Impact Management. The 9 Principles*. (Online)



- **Guiding impact expectations:** The IMP consulted with their practitioner community of over 2000 enterprisers and investors worldwide to develop five dimensions of impact which “help stakeholders understand their effects on people and the planet in a common way: who, what, how much, risk, and contribution”². The IMP continues to build consensus among practitioners on how best to measure and report impact.

While it’s critical that the industry works towards an agreement, only governments have the power to require businesses to measure and report on their impact using uniform metrics⁵.

Cutting through ‘impact washing’

Impact washing refers to the practice of using sustainability or impact metrics and/or labelling a traditional investment as having ‘impact’ to benefit from the positive associations carried by true impact investments.

Often these claims of impact are misleading and are based on unverified data from proprietary measurement tools.

This practice harms the growth of genuine impact investments by promoting scepticism and [undermining investor’s confidence](#)⁷. Impact washing makes it difficult for investors to filter the genuine impact investments which have been established to create both purpose and profit, from organizations who wish to demonstrate how they mitigate the negative consequences of their actions.

Frighteningly, an opinion piece in [USA Today](#) revealed that it is common practice on Wall Street to ‘greenwash’ investments or falsely market investments as environmental, social and governance (ESG) when in reality they

make no discernible positive impacts on the environment at all⁸. These investments are providing handsome profits, yet there are no laws that prohibit the practice.

The lack of regulated industry-wide reporting and measurement mechanisms, in addition to unhelpful and confusing definitions of sustainability⁵, is also fuelling this practice,

However, standardised impact measurement and verification may not help as much as hoped. An article in the [Harvard Business Review](#)⁹ proposed that while measurement and metrics would ensure everyone was communicating in a consistent, comparable way, it will not prevent organizations from claiming green credentials on the basis of reporting, despite not taking realistic, tangible actions. Even setting sustainability targets is problematic as organizations frequently set targets that exceed ecological limits and economic restraints with the belief that being seen trying to change is enough.

2. Hand, Dithrich, Sunderji & Nova. (June 2020). 2020 Annual Impact Investor Survey. Published by the Global Impact Investing Network (GIIN).

5. Sir Ronald Cohen (2020) *Impact: Reshaping Capitalism to Drive Real Change*.

7. Laura Dew (19 August 2020) *Impact washing’ hurting true impact investments: Pengana*. Money Management.

8. Tariq Fancy (16 March 2021) *Financial world greenwashing the public with deadly distraction in sustainable investing practices*.

9. Kenneth P. Pucker (May-June 2021) *Overselling Sustainability Reporting*.



Dispelling the misconception that ‘doing good’ means sacrificing financial returns

Despite the fact that impact entrepreneurship has proven itself as a viable means to ‘do well by doing good’⁵, the misconception remains that impact investments are purely a philanthropic activity. This has been fuelled by a lack of consistent impact measurement tools and reporting (as discussed earlier), a lack of recognizable investment products and approaches⁴, and poor awareness of what impact investing can deliver.

In reality, the market offers a range of investment opportunities making it “possible to achieve competitive returns”¹⁰. Below market rate opportunities still exist where investors are happy to accept lower returns and higher risk for the social, economic or environmental trade-offs that impact projects deliver.

Investors are not disappointed either - a tremendous majority of respondents to the [2020 Annual Impact Investor Survey](#)² reported “meeting or exceeding both their impact expectations and their financial expectations (99% and 88%, respectively).” Additionally, in 2019 The Responsible Investment Association of Australia¹¹ reported that Australian investor’s experiences have largely aligned with their expectations for market returns.

To prevent potential investors from overlooking profitable impact investment opportunities, it is vital that the industry clarifies impact measurement standards, communicates the types of investment products available in terms familiar to investors, the expected financial and non-financial returns, and **the trade-offs that come with the higher risks attached to their investments**¹¹.

However, most experienced impact investors (67%) specifically target opportunities that will provide a return at a risk-adjusted market rate².

2. Hand, Dithrich, Sunderji & Nova. (June 2020). *2020 Annual Impact Investor Survey*.

4. Australian Advisory Board on Impact Investing (2017) *Views from the impact investing playing field in Australia on what’s happening and what’s needed next*.

5. Sir Ronald Cohen (2020) *Impact: Reshaping Capitalism to Drive Real Change*.

10. Emily Woodland (19 June 2019) *Impact investing: opportunities and challenges*.

11. Jonathan Godsall, Aditya Sanghvi (22 November 2016) *How impact investing can reach the mainstream*. For McKinsey & Company.



“A major challenge is the need for greater integration of impact through strategy, management, reporting and governance, to optimise for impact and achieve more consistent and comparable ways of measuring and communicating the economic, social and environmental impacts. The focus has to be on what’s needed for more informed decision-making.

“

Huge strides have been made in recent years, notably through the Impact Management Project, which produced a shared logic and relevant building blocks. Additionally, the SDG Impact Standards sharpened the focus on what it means to contribute positively to sustainable development.

However, the tools available are not yet widely understood or utilized. Measures are underway to support the change, including a MOOC style training program led by Duke University, to be available in 2021, and work led by the GSG to drive the next wave of convergence.

The most significant shift in modern accounting practice is seeing capital market actors, including the International Financial Reporting Standards Foundation and European Commission, put sustainability squarely in frame.

Another major issue is how we frame both materiality and engagement. Currently, many enterprises and investors focus on how environmental, social and governance factors can impact the financial

valuation or performance of their enterprise or investments, rather than how their activities and investments contribute to economic, social and environmental impacts on others.

Meaningful stakeholder engagement includes interacting with those (people and planet) who are affected by the activities being financed. How we look at what’s material to business and investment also affects how we look at risk. Expanding the considerations to include impact risk would inform a more robust assessment.

We have a breathtaking opportunity to reframe and reset, and in the process, unlock real value, improve people’s lives and conserve the planet.”



Rosemary Addis is renowned for growing and leading impact focused innovation and investment for over twenty years. As Founding Chair of Impact Investing Australia, and Ambassador for the Global Steering Group for Impact Investment, Rosemary holds a portfolio of board and advisory roles, guiding business and investment firms as they focus on profit for purpose.

ROSEMARY ADDIS AM
Founder Impact Investing Australia



Creating opportunities for meaningful stakeholder engagement

The breadth of stakeholders involved in impact investing means organizations across the spectrum must engage with a diverse range of people: from their own staff to investors, government bodies and not-for-profits, to people on the ground building businesses and running projects, the local community and the beneficiaries of the activities being financed.

The World Economic Forum's publication, *Engaging All Affected Stakeholders: Guidance for investors, funders, and organizations*¹², states that:

“

“To truly understand the extent to which impact and value are created, to identify the risk of negative impact and unintended outcomes, and to uncover ways of maximizing social and/or environmental value creation, it is critical to engage with all affected stakeholders. That doesn't just mean end-beneficiaries/end-customers or shareholders; it also means others affected such as staff and community, paying special attention to the most vulnerable and marginalized, and it means understanding the effects on the environment.”

However, in developing their guide, the World Economic Forum found that participants in the impact investing community (and often in traditional investments sectors) need and want guidance on practical, credible and low-cost ways to engage with, respond to, and incorporate the voices of their stakeholders into their activities.

Impact investments also require a long-term outlook and extensive implementation window. Their success, therefore, rests on strong long-term relationships based on regular and open communication that delivers information on the success of the project relative to each stakeholder's interests.

Distributing a financial performance report alone is not only insufficient to meet these challenges but is often irrelevant for many stakeholders for whom the social or environmental impact of an investment is their first priority. A family who is counting on the success of an impact project to provide them with housing requires engagement on a different level than an investment fund manager.

Impact organizations need to consider the full range of communication channels at their disposal, both traditional and non-traditional, and take a planned approach to engage with stakeholders where they are via live events, in-person meetings, print material, press releases, newsletters, social media, email, websites and videos.

12. World Economic Forum Working Group (2017) *Engaging All Affected Stakeholders: Guidance for investors, funders, and organizations*.



Attracting investors with the right values

The age-old maxim “People buy from people” is particularly pertinent here. As with many things people choose to interact with and purchase in their life (a house, a new employer), the decision to direct finances into an impact investment opportunity is based on interpersonal relationships as much as purely factual data. Impact investments are, after all, the physical manifestation of a person, or group, acting on their strongly held values.

A sound financial basis and cohesive value proposition are still vital to meet due diligence and assure potential investors that their investment decision is sound. However, when faced with hundreds of opportunities, impact investors will be attracted to those whose passion and *raison d'être* is easy to identify and relate to.

Additionally, [Nesta, a UK-based innovation agency](#), advise that impact investors are looking for a clear values proposition, impact story and articulation of user needs¹³. While reports and business plans using standard language and IMM tools are useful to communicate with investors from the mainstream market, they do not allow for the powerful storytelling needed to attract investors whose values will see them invest for the long term.

Strong narratives, enthusiasm and values are best delivered with a human touch via video, live speaking opportunities and podcasts. This means that impact organizations and investment issuers, in particular, need to think like marketers and humans as well as finance experts – a task that may not be easy for some.

Driving awareness of impact investing to make participation easier

Growth and scale are impossible unless target stakeholders understand the offering, what the benefits are, and what you expect of them in return. People need information to make decisions, and if it is delivered in a way that is convincing and taps into their desire to combine their skills or investments with a sense of purpose, they will be compelled to act.

The report *Scaling Impact: Blueprint for collective action to scale impact investment in and from Australia*¹⁴ named “making it easier to participate” as one of three key themes for growth activities. First and foremost, these activities must centre around growing awareness of the broader concept of impact investing.

“Awareness and education need to run the gamut: from raising in forums and through stories that bring solutions and impact to life in a compelling way; to more structured education to build and translate interest to action.”¹⁴

It is therefore the responsibility of impact organizations, investment issuers, government, and non-government bodies to incorporate advocacy into their communication strategies to ensure the growth of the industry as a whole.

“

13. NESTA (15 May 2018) *Impact investment: How to get funding for your project*.

14. Rosemary Addis, Fabienne Michaux, Sally McCutchan with contributions from the Australian Advisory Board on Impact Investing (2018) *Scaling Impact Blueprint for collective action to scale impact investment in and from Australia*.





A Proactive Solution

With significant challenges to overcome, we must be proactive with communication, leading the way with fit-for-purpose content using storytelling techniques that sit alongside traditional financial reporting.

This approach will support the right people having access to material they can easily share, which will engage broader audiences and ultimately, compel further action.

In the modern business world, it is unthinkable to invest resources into an initiative and not put best practice digital marketing – particularly video – behind it. You need to ask yourself:

- Do people need to know what we have learnt through our work/project/initiative?

- Do we want to do more of this type of project and/or create further and ongoing impact?
- Are we serious about getting access to more funding?

It is no longer a question of “Should we make digital content?”, rather “How can we use digital content best practice to enhance our stakeholder engagement and reporting activities?” The answer to this question varies for each organization but encompasses the following aspects:

Making standardized measurement frameworks meaningful for humans

The increasing adoption and success of standard impact measurement frameworks, such as the IMP, IRIS+ and the SDGs, is a hugely positive development. The next step is conveying the successful outcomes measured by these frameworks via regular, easy-to-consume content. Crucially, the essence of both impact measurement and financial reports needs to be humanised, to be told in a variety of ways that the diverse range of stakeholders involved in impact investments can understand and be proud of.

For too long, consultants and organizations have spent countless hours developing comprehensive detailed reports containing a tremendous amount of analytical data, only for them to be left on tables by decision-makers short on time. Arguably, it has been a wasted effort.

Integrating video content production into your reporting frameworks translates your knowledge into an easily consumable and sharable format. Collectively the industry can then learn from your hard-won insights because you've made the extra commitment

to communicating them in an accessible, educational, inspiring and challenging way. Your video content becomes an important tool in promoting broader awareness of impact investing, attracting investors with the right values, and opening opportunities for stakeholder engagement.

Becoming a content producer can be an overwhelming proposition, however, it is not one that you have to burden yourself with. The answer lies in incorporating content production and verification of your impact into your theory of change so that it becomes a group responsibility. Ask grant or funding recipients to create short pieces of content in honest, direct-to-camera pieces as a condition of their regulatory compliance and ask senior leaders to do the same to convey statistical and financial information.

Importantly, have this production process led by a talented and experienced team, so the collection, editing and delivery of the material is seamless and high-quality, without upskilling your already busy staff.



Using video as a primary communication tool

People are consuming video more than any other content format. A 2018 [global report published on Statista¹⁵](#) revealed that 88% of Australians and 85% of Americans watch online video content on their devices.

Video's popularity and effectiveness lie in its ability to present information in an easily consumable, sharable format that takes advantage of our [brain's hardwired preference for visual processing, movement and colour¹⁶](#). For example, approximately 20% of our brain is dedicated purely to processing visual stimuli. Despite a premature visual system at birth, babies seek out 'faces' (which appear as a round shape with two dark bands for eyes and mouth) before they notice anything else. Additionally, while colour increases recall of technical information by up to 82%, movement is nature's way of keeping us interested in what we are watching to scan for danger.

A [Content Trends Survey¹⁷](#) by global marketing software provider Hubspot, revealed that branded videos were more memorable than a branded photo or written content. Furthermore, while Millennials led the pack, the survey found that there was a consistent preference across all age groups for consuming videos by brands they support rather than email, blog articles or PDF downloads.

A 2020 report by Wyzowl¹⁸ also found that 66% of consumers prefer watching a video to reading to learn about a product or service.

In addition to meeting consumer needs, video also provides numerous other benefits.

- **Video allows you to build for the second circle.** You are probably confident, engaging and know your stuff. The problem arises when the person you've just met tries to convey your message to someone else: it won't have your nuance, expertise or enthusiasm. Video helps your audience pass on your message without losing any of the meaning or passion.
- **Multiple content types lend themselves naturally to being presented via video.** Every executive summary you've ever read could be turned into a shareable video, simply by having a senior leader relay the information on camera. Video doesn't have to be limited to interviews - it is a powerful tool that can convey an organization's story, investment reports, on the ground successes, testimonials, your mission and vision or industry news pieces - there's so much material that can be captured and delivered quickly and effectively using video.
- **Video places real faces in front of your audience.** People connect with people telling authentic stories with enthusiasm. Seeing the person behind a project makes an opportunity feel real and tangible and allows the audience to visualise their part in the organization's story moving forward. Shareable video content that features your people captures attention, conveys technical information and positions you as a subject matter expert in a way that written content simply can't.

Any investment in video production should not be taken lightly. Done to a high standard, it can empower and influence people like no other medium. However, like any good craft, the production of high-quality videos can be time-intensive and costly from a financial and focus perspective, especially so if the result is mediocre. Conversely, if the result is effective at driving strategically aligned business outcomes, the value it creates can be tremendous.

15. Statista (2021) *Share of internet users who watch online videos 2018, by country.*

16. Canva (2021) *10 scientific reasons people are wired to respond to your visual marketing.*

17. Mimi An (2020) *Content Trends: Preferences Emerge Along Generational Fault Lines.*

18. Wyzowl. (2021) *Video Marketing Statistics 2021: The State of Video Marketing.*



Creating a broadcast-quality video about your project enforces to the market that you stand by your values and creates an emotional connection; it is a sign of respect for your audience who take the time to view it.

Marketers in the private sector and not-for-profit organizations have long understood the value of video in the communication mix. In a report by [Wyzowl](#)¹⁸, 89% of marketers reported

good ROI from the use of video, and 87% said video increased traffic to their website.

Those leading the impact investment industry have already begun their journey into digital media and video. The GSG is developing its video and digital approach in 2021, including a new website and several of the 33 National Advisory Boards have released websites and video as well.

18. Wyzowl. (2021) *Video Marketing Statistics 2021: The State of Video Marketing*.

“I haven’t done a lot of interviewing before, but Philip was able to make me feel quite relaxed and also my subjects quite relaxed as we teased out really important information about the success they’ve had with our products, and their vision of the future with working with us.”

“

In our initial production meetings, I threw Philip in the deep end, and I did my elevator pitch so that he could understand who we are, what we’re about, what is Shareable Apps, where are we going. I basically did a huge brain dump, disappeared to the bathroom, and by the time I came back, he’d verbally recorded a new presentation, pulling out all the salient points, and helped me improve the quality of my pitch, which is something that hasn’t happened for quite a while, and that was really fascinating.

He’s helped us up our game in terms of the way we communicate on video throughout our various different channels, and he’s been instrumental in helping me distribute our message to our shareholders and to our clients and staff as we go through our IPO process.

Overall, Philip is a very interesting mix of not only production credentials, but he’s highly strategic and very knowledgeable with the way that businesses need to communicate, so a mix

of strategist and production expert, and you’d be hard-pressed to find anyone that can actually cover off that skillset, and that enables him to help you do a much better job.

I have no hesitation in recommending Philip for any kind of project, the bigger the better.”

ADAM FRIEDMAN
CEO, Amplifier Corporation



Prioritizing emotive, story-led content to drive connection

In a field study conducted by the Australian Advisory Board on Impact Investing in 2017⁴, some participants noted the commitment to an impact investment is both commercial and philosophical in nature and thus requires engaging investors through storytelling and emotive experiences.

A printed annual report and financial updates alone are unlikely to move someone wishing to improve our planet's health - they need to feel emotionally connected to the people and purpose they are investing in to validate their decision. This is not surprising when we consider how our brains work.

Firstly, psychologists know that **humans are compelled to act in response to emotions** brought about by their connection to a brand's narrative and an attraction to the brand's personality¹⁹. Functional magnetic resonance imaging (fMRI) has demonstrated that consumers primarily use emotions (feelings and experiences), rather than information when evaluating brands.

Secondly, **neuroscience has proven**²⁰ that we purchase using emotion, and then justify our decision using facts. Therefore, communicating

to potential investors and stakeholders on an emotional level first, and then providing hard data complements our natural decision-making process.

Finally, when reading a story, **our brains are capable of creating vivid simulations**²¹ that closely mirror those involved in similar real-world activities. Our brains integrate details captured from the text with personal knowledge from our own experiences to connect us to the story. While this research was text-based, the same principle could easily apply to oral storytelling.

The most successful marketers across the world already know this information and have employed emotion to great effect using a concept known as behavioural economics. According to a **Gallup and Disney Institute study**²², businesses that apply behavioural economics principles to successfully optimise the emotional connection with their audience tend to outperform their competitors by about 85% in sales growth.

This sounds complicated, however, using video makes this quite simple. Emotive content is created when you empower people to tell their stories on camera - whether they are current investors, recipients of funding or the founders of the organization - so that they become part of the communication solution.

4. Australian Advisory Board on Impact Investing (2017) *Views from the impact investing playing field in Australia on what's happening and what's needed next*.

19. Peter Noel Murray Ph.D (26 February, 2013) *How Emotions Influence What We Buy*. *Psychology Today*.

20. Michael Harris (31 March 2017) *Neuroscience Confirms we buy on emotion & justify with logic & yet we sell to Mr. Rational & ignore Mr. Intuitive*. *Insight Demand*.

21. Gerry Everding (26 January 2009) *Readers build vivid mental simulations of narrative situations, brain scans suggest*.

22. Gallup (7 November 2018) *Why B2B Leaders Should Get in Touch With Their Customers' Feelings*.



“Recently I joined a webinar of responsible investors who talked about the importance of superfund members using their power to make a positive impact. The network of responsible investors invited a high-profile climate change advocate, comedian and media darling to chair the forum and at the end, he said ‘How do we talk to people who don’t give a shit? We’re talking to people who do.’



I see it every day. We need to broaden our audience if we are going to mainstream the idea of an impact-led recovery. Consumers, investors, voters create the need for change.

We need to keep messaging short and find an emotional connection. I’ve been critical of the communications around COVID. There’s plenty of communication around the ‘What’ - hand sanitisation, social distancing, symptoms etc., but not enough of the ‘Why’. The best TV commercial in this space showed a young nurse who had been separated from her children as she recovered from the virus. We need more of the ‘Why’ in our communications too. That’s how you get advocates and action.”

KADI MORRISON

Kadi Morrison has worked in brand leadership positions at the highest levels, including Qantas and currently Alba Thermal Springs, as well as being the Director of Strategic Communications and Engagement at Impact Investing Australia



Integrating content production into regular reporting schedules

Investors need consistent confirmation, every six months at a minimum, that the projects they are funding are progressing. This means that you need to lean into producing regular emotional content that demonstrates how their money is being used and how their investment is delivering on their values and expected returns to secure a long-term commitment.

This can be done in an advanced way using software platforms that act as clearinghouses for regular video content. In practice, field partners can create material via a smartphone app, send it to a central software platform where a team

member or external production agency can review it, edit the material, and then add branding to the front, middle and end of the video. A cohesive brand message can then be distributed via email, social media or embedded on a website.

The resulting videos have a flow-on effect: financial contributors can see the stories of the people they are impacting and the benefit of investing their capital. In turn, they can celebrate and share their involvement with their peers who may choose to invest. This opens the doors for more capital to flow into organizations to continue creating a positive impact at scale.



Real-world implementations, their challenges and success

“I was the CEO of Uniting Care Werribee Support and Housing for over twenty years, supporting youth at risk, homelessness and food insecurity in Wyndham. We were consistently having our funding cut and after a discussion with Philip, he spent a day filming our story, team and facilities, then produced a series of short videos.

He showed us how to engage and direct our local community to start a discussion, then supported our push back against the funding cuts. Thereafter we were successful in securing \$15 million dollars over a four-year period in government funding, for our agency and other local support services!”

“

CAROL MUIR OAM
Former CEO, Werribee Support & Housing

CASE STUDY

Uniting Care Werribee Support and Housing

PROJECT IMPACT

Funding cut turn around and allocation of \$15 million

Now known as Uniting Wyndham, Uniting Care Werribee Support and Housing provides a range of services to the community including food assistance, emergency relief, domestic violence support housing support, unemployment support, community health care, aged care, early learning, mental health care, counselling and drug and alcohol programs.

Bravo Charlie spoke to their CEO, Carol Muir when funding cuts were affecting their already stretched organization of 10 to 20 staff and volunteers. When we consulted further, it became apparent that avenues for funding and support for the organization were limited, simply because many people in the wider community didn't know they existed or what they did.

The services this organization provided were critically important and warranted a high-quality video to tell their inspiring story.

In one day, our film crew shot a six-minute video with Werribee's staff. It was shared via updates on the organization's Facebook page with a strong call to action: "If this is important to you and if this work is something you care about, tell your local MP and say "Enough. These people need support. They need help."

The video was shared extensively on social media and reached local community members who took Werribee's cause to their local MP who, in turn, helped the organization to secure **\$15 million in funding.**

This project delivered proof that video can influence people to take action. When you are proud of what you do and want to scale your organization, it makes sense to capture your story in a format that's informative, engaging and entertaining, share it widely, 'rally your troops' and point them in the right direction to make a positive change.



Visit <http://bit.ly/UCWSH> to view.



University of Surrey

PROJECT IMPACT

Re-engaged audiences with critical information using non-traditional reporting formats

The University of Surrey is one of the UK's top universities, with a vibrant campus located in the South East of England housing research and education in science, business, health, arts, music, engineering and tourism.

Each year, the University of Surrey produces an Annual Review to capture the academic, student and research achievements and highlights of the previous year, in addition to a summary financial review. By 2015, it was common practice to host the 80+ page digital version of the report on a landing page, together with a short (outsourced) film, there were no goals in place to give the Annual Review purpose, and no way to truly measure its impact.

Bravo Charlie's content writer, Katrina Strathearn was tasked with managing the 2015 report. Upon examining the information needs and communication preferences of the key audiences two things became apparent: 1) the audiences were time-poor and a large document (either printed or in PDF) wasn't allowing them to access the relevant information quickly, 2) the story of 2015 was made up of the achievements of thousands of people in the university, and therefore it was the staff who should be front and centre when it comes to sharing that story.

Those insights led to a multi-channel, digitally-focused campaign with an emotive video featuring key facts, staff and students at its core.

The campaign also included:

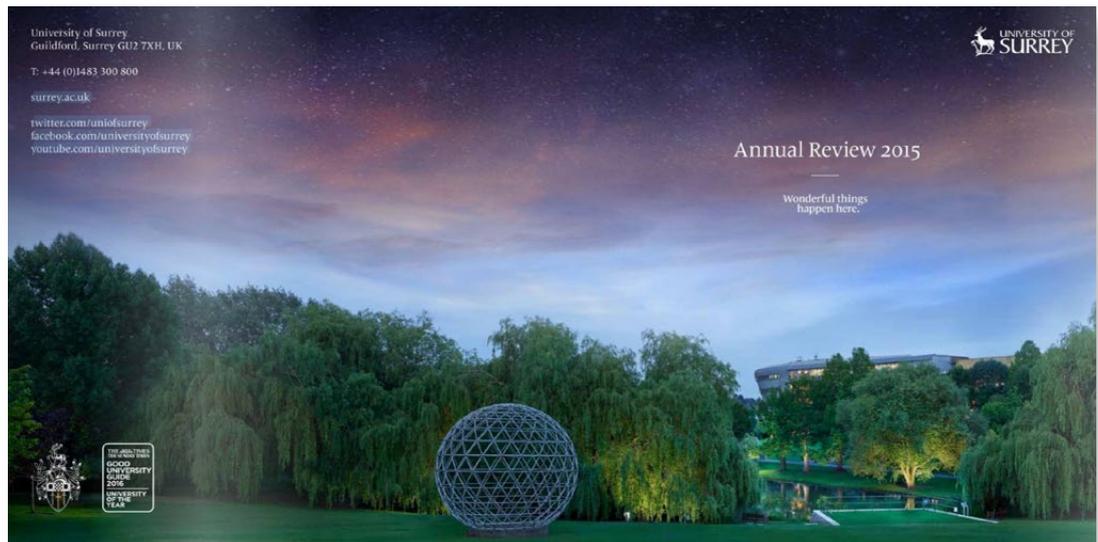
- A slim-line, glossy publication available in print and PDF
- 3-minute film and 15-second teaser, [click here to watch](#).
- A series of four infographics highlighting the key statistics and achievements of the year
- A purpose-built microsite to host the PDF, infographics and video.
- A launch event with key academic and professional staff, community members and VIPs.

Key to the success of the campaign, both in terms of engagement and measurement, was a social media campaign that focused on the video. Led by the University, the campaign began a week prior to the launch event and utilised key facts from the review and the infographics.

The campaign delivered outstanding results with 249,556+ impressions on Facebook leading to 81,000+ film views 29,090 post engagements, 1,140 shares and 3,489 likes. Twitter posts that featured the video saw engagement rates of between 2.2% and 7.2% with a high of 10,805 impressions and 162 video/image engagements. No other annual report campaign had received such high levels of engagement.

When delivered in a format that is accessible, connects with human emotions and delivers information quickly, an annual report can be transformed from a book on a shelf into a valuable stakeholder engagement tool.





[Click here to view publication.](#)



[Click here to watch video.](#)



CASE STUDY

Kilter Rural

PROJECT IMPACT

Authorative and compelling video based, investor engagement platform

Kilter Rural are world-leading agricultural regenerators, managing over 9,000 hectares of farmland, and are regarded as one of Australia's largest and most experienced water investors. With funds under management exceeding \$500 million, they were the 2019 Asia Pacific Impact Asset Manager of the Year, and are the country's largest producer of Organic tomatoes, also farming organic wheat, barley, soy, fruit and vegetables.

With a team of 45+ and an initial investment of \$176 million in 2006 from VicSuper, Kilter has three funds open to investors: the Murray Darling Basin Balanced Water Fund, Kilter Water and Australian Farmlands Fund.

Kilter chose Bravo Charlie to support crafting their story through video and identifying the digital marketing systems they can use to engage and amplify their message.

Starting with several rounds of consulting to the senior executive, we introduced external vendors regarding SEO (Search Engine Optimisation) and company positioning statements to get the team talking the same language, conducted our own branding reviews and made suggestions, analysed their existing marketing systems, made tweaks and created a roadmap.

To capture their story, we conducted a day of interviews which was edited into 67 short pieces of content for use across their digital channels, built a video engagement platform they used to present the content to a global Agriculture investing audience in New York, and then crafted their overall story in both full and broken into shorter segments.

We look forward to Kilter benefiting from increased engagement from the global investing community and recognition as a guiding light in providing an opportunity for financial return, better water management and biodiversity to underpin organic farming at scale.

Click here to visit the Kilter Rural Engagement platform at <http://bit.ly/KRInvestorVideos>



Institutional Impact Investing

As Australia's largest grower of organic tomatoes, wheat and barley, and one of its largest water asset managers, 15 years into our journey we have a proven model ready to scale, that combines environmental protection, soil remediation, and uncorrelated financial returns.

The material here is intended to give you as much or as little of the story as you need, so that you can reach out to commence a discussion.

If you have a mandate to invest in creating a better future for our world, whilst delivering superior financial returns, we look forward to speaking with you.

[▶ Resume](#) [Subscribe for updates](#)

PART I WATER

4 MIN

Leading from the front, governance, farming and water

CASE STUDY

Circular360: The Global Centre of Excellence in Circular Economy

PROJECT IMPACT

Concept to turn-key brand deployment

Commissioned by the Circular Economy Alliance Australia in collaboration with Green Industries South Australia, we were tasked with the setup of the new 'Global Centre of Excellence in Circular Economy' also known as Circular360.

Circular360 is a partnership-based organization that will play an important role in accelerating the adoption of the circular economy, enacting practical solutions and acting as leaders in academia, industry, government and international communities.

The broad remit of this organization, and the theoretical philosophy that underpins it, required a communication strategy that was simple, direct and concise. Their main priority was to generate interest from potential partners which called for content that used plain language, top-line information and strong calls to action.

Our work encompassed: establishing branding elements like the name and logo and creating a brand style guide; writing and design of a prospectus; video production; producing and launching the website including content writing, design, development and hosting set-up; and systems integration.

The Bravo Charlie team created videos using a series of interview clips featuring the Centre Director and refined and assembled them with additional footage we sourced externally. The website, set to launch in mid-2021 has a video channel for further content development.

In July 2021, Circular360 will be launched and publicised via a Ministerial launch prior to which the centre will establish associations with existing industry stakeholders.

Click on the image below to watch the launch video or read the 'The Art of Becoming Remarkable' for a detailed guide on creating a brand from scratch.



[Click here to watch the launch video.](#)



[Click here to view The Art of Becoming Remarkable.](#)



A professional video camera on a tripod is positioned on the right side of the page. The camera is black and has a large lens. It is mounted on a black tripod. In the background, there is a yellow patterned curtain and a white wall. The overall scene is a studio or production environment.

Practical Steps

For change makers wishing to take a proactive, content-led approach to communication – whether on their own or with an external production agency or consultancy – it is imperative that they understand the practical tasks involved.

The production of successful content relies on organizations being clear on where their project and audience lie on the impact investment spectrum and their purpose. They must then translate this information into an achievable communication strategy with video at its core.

Organizations can achieve this through the following steps.

Know and articulate your purpose

This purpose is what makes your organization, and your proposition, valuable and unique to investors. In other words, purpose is what drives staff to get out of bed in the morning - their 'why'.

In the impact investment space, managing money effectively and creating positive life-changing outcomes for stakeholders is a given. Your organization needs to stand out in a crowded marketplace with a statement that shows stakeholders why you do what you do, and crucially, how you are different to others in the field. Not only does a clearly articulated purpose set your organization apart, but it provides you with a language that allows people to relate to you.

Furthermore, a clearly defined unique purpose gives potential investors something they can choose to trust when undertaking due diligence, in addition to your implementation, track record and business plan.

This purpose can be defined in several ways.

- Research competitors to see what others are doing and identify the gap that the organization fills.
- Asking someone external to interview senior team members to get to the essence of who the organization is and its reason for being.
- Articulate the story of the organization and identify how the organization is different.

The body of knowledge obtained through these processes can be codified and related to the organization's Tone of Voice (TOV) which is explained to the right.

Well-established organizations have often undertaken a similar exercise under the heading 'branding', which can result in visual identity and key marketing messages. Distilling a purpose from that exercise is about relating that brand into a story that can be reinforced and repeated through documentation, video content and in-person meetings.

A word of caution: while working with an agency to carefully craft a brand and consistent marketing messages is worthwhile, the results may lack authenticity and humanness. True engagement comes when senior stakeholders can articulate their purpose in their own words and deliver their story authentically.

The Tone of Voice guide

To keep messaging consistent across separate pieces of content and formats, all communications should be created in line with an organization's Tone of Voice (TOV). A TOV guide outlines how a brand should sound in written and oral communication and encompasses phrases, keywords, a brand personality description, values, key messages and examples of written content. This tone can be flexed to ensure content resonates with each stakeholder group.



Understanding your place on the investing spectrum

It is vital that you understand where you lie on the investing spectrum (top line) relative to the type of financing options you offer and the values that your stakeholders hold.

Your position on the spectrum is helpful in guiding your Tone of Voice and key messages used for each stakeholder group, it influences what content you generate and what formats are required.

Investing spectrum ‘where are you?’



It is also important to consider your place in the larger ecosystem, and how you can contribute to developing a cohesive Impact Narrative; [click here to read more about this initiative, via the Global Steering Group for Impact Investment website.](#)

Design a communication strategy

Your purpose and where your organization sits on the investment spectrum, in addition to your values, goals and objectives, provide the pillars on which you can build a communication strategy.

The real communication gold lies when you combine these with videos that capture your people speaking from the heart and answer questions that articulate your position in relation to your investor’s requirements.

It is important that strategy (where your organization wants to go, why and how you will achieve that) comes before tactics (the tools used to enact the strategy). Without a cohesive plan, you risk creating content that does not resonate with the target audience(s) and does not compel them to act.



A communication strategy should encompass:

- **A thorough analysis of each stakeholder group (the target market).** This involves identifying the values, informational and emotional needs and communication preferences for each stakeholder group across the impact investment spectrum. This is crucial when determining how to communicate with investors.
- **A set of goals, broken down into measurable objectives.** You need to be clear on:
 - The actions you want people to take because of watching/reading/interacting with the material you produce, and in what timeframe.
 - What your organization hopes to achieve, for example: dollars invested, enquiries received, positive engagement from stakeholders, press coverage.
- **An outline of all the touchpoints that stakeholders encounter and how they will be leveraged.** The modern web has evolved from your website as the focus, to a network of touchpoints across which you share, leverage and analyse your content, all of which need to be considered in your strategy.
- **Key messages that can be used to ensure consistency across all touchpoints.** Messages can be crafted that fuse your organization's story, purpose and the information that each stakeholder group require. Crafting copy for each stakeholder group ensures that the messages have context, not just content.

“

Understanding the perspective of the investor is probably the best place to start. Organizations need to understand what their threshold for investment is and what they're comfortable investing in. They'll feel secure when they can understand that their money will be multiplied without too much considerable risk.”

RYAN BABBAGE
CEO, Strategy Hubb



Ryan (pictured with Philip Bateman, Managing Director of Bravo Charlie) works with both large corporate organisations and inspirational entrepreneurs who tackle the problems of the new technology revolution. Ryan is the author of the books *Ride the Right Tigers* and *Seoul of Asia*. He has also written research papers to prove the commercial value in ideas and to position innovations for capital investment.



Automate communication tasks

A cohesive communication strategy with a one, two, three or five-year horizon enables organizations to map out and automate communications on a long-term basis. This is not about chatbots or answering machines, but rather clever ways to distribute content to stakeholders at the right time with little effort.

For example, staff members often spend meetings explaining the purpose of the organization which leaves little time to get to the crux of the meeting – seeking buy-in or asking for support or investment. It makes sense then to develop an overarching strategy that pre-educates stakeholders with defined messages to answer the most frequently asked questions.

Tactically, short pieces of compelling video, supported with printed collateral, webpages and email can be sent to people prior to meetings so they know who your organization is and what you offer.

Just as a marketer uses a sales funnel for a B2B or B2C business, impact organizations can set up a communications funnel for investors and supporters to distribute relevant content for each stage of the decision-making journey.

- At the top: video links and lead magnets (white papers and other high-value documents that capture domain expertise) are shared via email and social media. The video platform can have several calls to action, and forms to capture email and details about where the person in the decision cycle, where they are from and what they're interested in. This allows you to deliver the relevant material.
- In the middle: Time-based emails deliver content, provide information to answer foundational questions, introduce the senior executives and outbound team and provide progress updates regarding financial and social/environmental impact.
- At the bottom: People feel empowered with information and will either call your organization themselves or be happy to receive contact from a team member.

The beauty of an automated funnel is that it allows this process to be replicated and delivered with very little intervention.

Alternatively, you can upload videos into a platform such as Wistia where people can create their own content journey. These platforms are a useful business development tool that uses content to fuel a broader marketing machine.

Effective organisation of content within relatively automated systems allows stakeholders to self-educate at their own pace, and reduces repetitive tasks for your business development team.



“I’m a huge believer in film for social change, and I believe video and effective usage of digital marketing is a requirement for the modern organization.

We’ve put quite a lot of work into upgrading our website and doing more video so that people can hear the high impact stories, because data’s important, but you need the stories as well as the data.

“

As a philanthropic foundation, we operate all along the grants and investment continuum. It takes a change in mindset to recognise that impact investment and responsible investment are additional tools in the philanthropy tool box. Grants and investments can both align with positive social and environmental outcomes.

I would like to see all foundations allocating 10% of their asset allocation to impact investment, across various asset classes.”



DR. CATHERINE BROWN OAM
CEO, Lord Mayor's Charitable Foundation

Dr. Catherine Brown OAM has worked in the not-for-profit and philanthropic sectors as a strategic and governance advisor, lawyer and executive, and is the author of *Great Foundations: a 360° guide to building resilient and effective not-for-profit organisations* (ACER Press, 2010). In 2019 Catherine completed her PhD thesis entitled “Unlocking the innovation potential of philanthropic foundations” at Swinburne University (Faculty of Business and Law), and in the same year, was appointed to the Prime Minister's Social Investment Taskforce. Also serving on several Victorian Government boards in health and women's affairs, she is committed to helping build a resilient, sustainable and inclusive society.



Establish a regular content calendar with video at its core

A yearly content (or editorial) calendar with video at the core of editorial activities helps you be proactive about communications and use best practice digital marketing.

Having a detailed plan of what content will be produced, when, and how it will be distributed saves hours of decision-making and confusion throughout the year.

Video production is quite labour-intensive, so setting up filming for a day or two every quarter is the most efficient way to obtain a lot of raw material at once.

With an hour of time from each senior executive it is possible to capture activities over the past quarter, what is coming up, and then pre-report any material for notable events in the calendar, such as significant cultural days or general market activities.

By having a strategic arc that underpins content production, it is possible to know what shorts need to be made, and when, so that producers can preface information as it arises with relevant, inspiring material.

The wisest organizations consider how they will repurpose content when planning their calendar. People consume information in different ways - video, blogs, social media - so you must endeavour to cater to this. One day of filming can deliver dozens of pieces of video content that can be broken into smaller chunks, transcribed into text and translated into reports, social media posts or online articles.

If you choose to produce video content yourself, the following tips can be helpful.

- Know what viewers should do as a result of watching the video so that questions and captions can be directed appropriately.
- Avoid scripts and slogans. People can tell when they are being marketed to, so use interviews instead. It can be helpful to:
 - Ask open-ended questions to prompt detailed, natural answers.
 - Use a standard set of questions for regular success updates so people expect the same format.
 - Think about telling a story rather than a sales pitch or news report. Engaging viewers with emotion and values is imperative.
 - Heed the 10 takes rule. When a specific statement is needed, 10 takes is the rule. The first four are to feel out the words and take ownership of them. The next two to three lock in the vocal nuance and poetic delivery, and the last one or two capture the message at its most clear and natural.
- Use a transcription service to provide transcripts of each video on your website. These are surprisingly helpful for people who want to pick out key pieces of information and refer back to them at a later time.



Next Steps

If you consider yourself a powerful, driven change maker, who wants to accelerate your impact by harnessing the power of video and best practice digital marketing, get in touch.

philip@bravocharlie.global
or call +61 (0) 402 017 700



Philip - Managing Director
Katrina - Copywriter
Love - Makeup and Grooming

Denise - Head of Design
Alana - Cinematographer
Chris - Animator

Florent - Operator / Editor
Zoë - Quality control
Eunice - Executive Assistant

About Bravo Charlie



PHILIP BATEMAN
Managing Director, Bravo Charlie

My name is Philip Bateman, and I'm the Managing Director of Bravo Charlie, which I founded 12 years ago.

I've been in the IT game for 20 years, and I've loved film and movies since I was a kid. It's not surprising though - the family business was a supermarket next to a video store. I've got a photo of me sitting in the new release section at two-and-a-half years old!

I love art and cinema, and I love communication and stories - the passion, romance and drama of it.

But I really hate advertising. I dislike obnoxious yelling and crappy ads. And I really, really despise so much of today's news that is emotively driven, incendiary stuff. It pits people against each other and creates an inherent bias in society.

The fact that we don't have truth in advertising laws is a fundamental challenge to civilization that we need to overcome. That our politicians can say the things they do and not be held accountable for it, is awful.

Within all this, I run a communications agency because I'm inspired by the ability of digital technology to help us to share what we're genuinely excited about. But before we can share it, we need to capture it and to do that, we need a fundamental understanding of the technologies involved and how to craft messages that work for that technology. That means being empowered to communicate passionately and articulate the kind of change we want to create.

It also means we need to know how business works because to create change in society at a business or commercial level, we need to know what drives our stakeholders. We can then take our message, articulate it and embed it into the systems that can create change at scale. It's powerful, it inspires me immensely, I've been studying it my entire life and will keep studying as it's changing constantly, and I learn new things daily.

For over a decade, I've been working with leaders of the most amazing organisations and startups: some that burn out, some that go on to change the world dramatically. Helping people on this journey has been a great privilege, and I've done this with Bravo Charlie's team of kick-ass professionals behind me, who I've handpicked from around the world. We're growing and exploring new ground every day.

Got something important you want to do?
I know how to get it done.



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