

Gifts in Wills Starter Kit

Implementation Guide

A practical roadmap to help you implement your Starter Kit with confidence, consistency and clarity.

Prepared for:

The Ripple Effect Foundation



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Welcome

Congratulations on taking the next step in building your Gifts in Wills program!

Your Starter Kit has been designed to help you establish a strong foundation without needing specialist Gifts in Wills expertise.

You don't need to implement everything at once. Use this guide as your implementation workbook, work through each phase at a pace that suits your organisation and check off tasks as you complete them.

Every organisation is different, so use the suggested timeline as a guide and adjust it to suit your capacity and priorities.

Progress is more important than perfection.

Your Starter Kit

Your Starter Kit includes practical resources designed to work together, helping you build the foundations of a strong Gifts in Wills program. Use this Implementation Guide to guide when and how each resource is put into action.

Your Starter Kit Delivery Page is your central hub for all your resources. Bookmark the page so you can easily return to it as you work through this guide.

YOUR STARTER KIT DELIVERY PAGE



Access Ripple Effect Foundation's Starter Kit here →

STARTER KIT RESOURCES

- 1 Gifts in Wills Webpage**
Educate supporters, encourage enquiries. → **Webpage Import Instructions**
- 2 Gifts in Wills Supporter Guide**
Educate supporters and encourage gifts. → **Supporter Guide Instructions**
- 3 Staff Toolkit**
Build staff confidence and consistency.
- 4 CRM & Stewardship Framework**
Track and nurture supporters. → **Stewardship Templates**

Suggested implementation timeline

This roadmap breaks implementation into four manageable phases, helping you move from reviewing your resources to launching your program and building momentum over time.

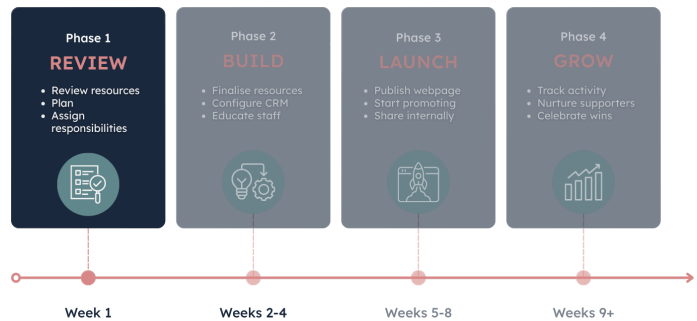
The suggested timeframes are a guide only. Adjust them to suit your organisation's capacity, priorities and internal approval processes.



Phase 1: Review

Take an initial read through each resource to understand what's included and how the resources work together. There's no need to absorb every detail or start implementing anything yet.

Then confirm who will lead implementation and agree on responsibilities, priorities and timelines.



Task Tracker: Week 1

Assignee	Est. Time	Description	Supporting Resource	Status
Pers...	15 mins	Confirm your Gifts in Wills lead	Staff Toolkit ▾	Not started ▾
Pers...	60 mins	Familiarise yourself with your Starter Kit resources	All Resources ▾	Not started ▾
Pers...	30 mins	Agree on implementation responsibilities, priorities and timelines	Implementation Guide ▾	Not started ▾
Pers...	60 mins	Book your Starter Kit Debrief (if required)	Book here	Not started ▾

Phase 2: Build

Turn your Starter Kit resources into a program that is ready to launch by finalising your materials, setting up your systems and preparing your team.



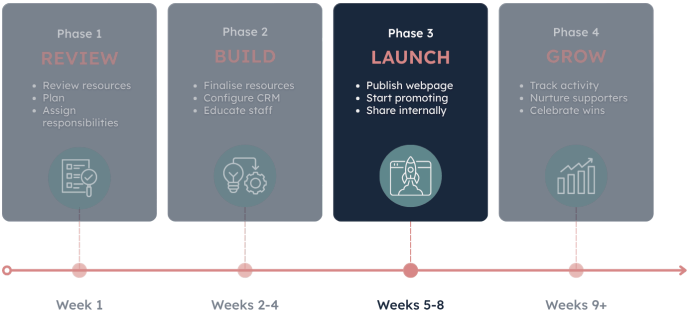
Task Tracker: Weeks 2-4

Assignee	Est. Time	Description	Supporting Resource	Status
J. Smith	30-45 mins	Review and finalise your Gifts in Wills webpage	Gifts in Wills Page 1: Webpage Instructions 1	Not started
J. Smith	30-45 mins	Review and finalise your Gifts in Wills webpage	Gifts in Wills Page 2: Webpage Instructions 2	Not started
J. Smith	2-3 hrs	Configure your CRM	CRM & Marketing 1	Not started
J. Smith	30 mins	Share the Staff Toolkit with your team	Staff Toolkit 1	Not started
J. Smith	30-45 mins	Test your webpage, enquiry form and internal enquiry process	Staff Toolkit 1: Gifts in Wills Page 1	Not started

Example preview
Full resource included with the
Gifts in Wills Starter Kit

Phase 3: Launch

Bring your Gifts in Wills program to life by publishing your resources, introducing the program to supporters and making it easy for people to learn more.

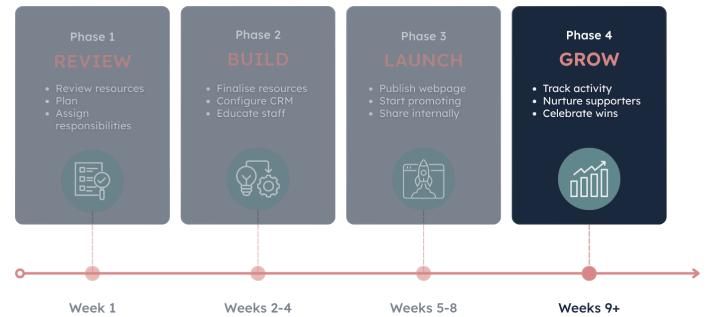


Task Tracker: Weeks 5-8				
Assignee	Est. Time	Description	Supporting Resource	Status
J. Smith	30-45 mins	Review and finalise your Gifts in Wills webpage	Gifts in Wills Webpage 1.1	Not started
J. Smith	30-45 mins	Review Supporter Toolkit 1.1	Supporter Toolkit 1.1	Not started
J. Smith	2-3 hrs	Configure your CRM to track and manage GfW	CRM & Tracking Toolkit 1.1	Not started
J. Smith	15 mins	Share the Staff Toolkit with your team	Staff Toolkit 1.1	Not started
J. Smith	15-30 mins	Test your webpage, enquiry form and internal enquiry process	Staff Toolkit 1.1 Gifts in Wills Webpage 1.1	Not started

Example preview
Full resource included with the
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Phase 4: Grow

Keep building momentum by responding to supporters, maintaining accurate records, nurturing relationships and keeping Gifts in Wills visible over time.



Task Tracker: Week 9 onwards

Assignee	Cadence	Description	Supporting Resource	Status
J. PEARCE	30-60 mins	Review and finalise your Gifts in Wills webpage	Gifts in Wills Page 1: Introductory	Not started
J. PEARCE	30-60 mins	Review and finalise your Gifts in Wills webpage	Gifts in Wills Page 2: About Us	Not started
J. PEARCE	3-5 hrs	Configure your CRM (see the starter kit)	Gifts in Wills Page 3: Contact Us	Not started
J. PEARCE	15 mins	Share the Draft Toolkit with your team	Draft Toolkit 1: Introduction	Not started
J. PEARCE	15-30 mins	Test your webpage, enquiry form and internal enquiry process	Draft Toolkit 2: Enquiry Form	Not started

Example preview
Full resource included with the
Gifts in Wills Starter Kit

You've got this!

Building a strong Gifts in Wills program takes time. The most important thing is to keep moving forward.

By working through this guide, you'll have put the foundations in place to make Gifts in Wills more visible, respond to supporters with confidence and build meaningful relationships over time.

You don't need to do everything at once. Keep using your Starter Kit resources, review your progress regularly and continue building on what you've established.

Small, consistent actions can create lasting impact.

Need support?

If you have questions or need help as you implement your Starter Kit, Future Impact Collective is here to support you.

[Get in touch](#)

[Explore additional support](#)