By leading with empathy, we can deeply connect with others and uncover insights that help us collectively reimagine financial services for those over 50.

Conducting the Interview

**FIND A PARTNER**
Identify another person to interview. Introduce yourself and thank them for participating.

**BE EMPATHETIC**
Ask for permission before taking photos or recording audio. Try to step in the shoes of the person you’re interviewing.

**START THE CONVERSATION**
Take at least 30 minutes for the interview. Start by learning more about your partner before easing into the prompt: “I’d be honored if you would share a story about you or a loved one.”

**DIG DEEPER**
Follow up with thoughtful questions: How did that make you feel? Why do you think that happened? How did it impact your life?

After the Interview

**SYNTHESIZE LEARNINGS**
Reflect upon and organize the responses you’ve collected on the next page.

**STORYTELLING**
Write a compelling story about the financial experiences shared with you. Focus on your most insightful and inspiring findings. Think about why your interviewee answered in a particular way. Take it a step further and be visual by accompanying your story with sketches, photographs or videos.

**SHARE ON OPENIDEO**
Compile your story and visuals together and upload it to the Financial Longevity Challenge at www.openideo.com in the Research phase.
Synthesis Toolkit

Use this toolkit (or a separate piece of paper) to capture insights, quotations and whatever else might inspire the community to create new solutions around creating financial services that support the dreams and obligations of those 50 and older. Drawings and sketches are also great tools for helping the community understand your learnings. We encourage you to share your insights on openideo.com!

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<tr>
<th>Important Insights</th>
<th>Background Information</th>
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Memorable Quotes

Draw Your Partner
Submitting Your Stories to OpenIDEO

Log into openideo.com and submit a contribution to the Financial Longevity Research phase. Your interviews help us get a global perspective on the Challenge and ideate better solutions for the topic. Use the “Save” function often and, when you’re ready to share your story with the world, click “Publish” to go live.

Storytelling Mindsets

BE PERSONAL

During the entire storytelling process, we encourage you to “be visual” and include photos, videos, sketches or drawings that might elevate your partner’s story.

The best stories require vulnerability. There needs to be shared trust and a willingness for everyone involved to be open to get the most out of this activity.

BE SPECIFIC

Ask your partner to describe their emotions or illustrate the environment of their story. Specificity resonates with most audiences and will foster engaged conversations on OpenIDEO.

BE CURIOUS

Get a clear understanding of your partner’s life story. Ask questions that help you dig deeper. If you hear something unique, ask them more about it. Be sensitive throughout this process.