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AI + PLANNED GIVING: Amplifying Empathy at Scale



Avid revolutionizes fundraising with on-demand technology that unifies data, delivers tailored playbooks, and scales personalized engagement—all in minutes.

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CHANGES

EVERYTHING

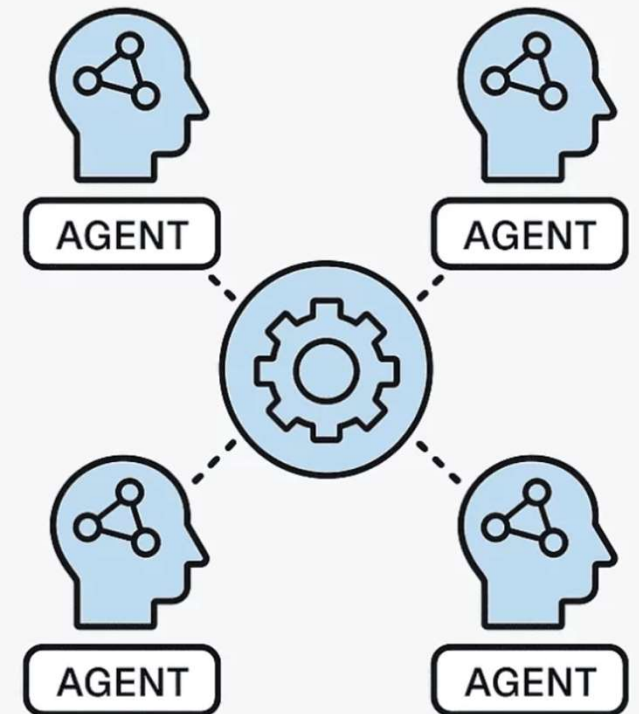
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AGENTIC AI

Autonomous artificial intelligence systems that can plan, reason, and act to achieve goals with minimal human intervention.

Unlike traditional AI that performs specific tasks, agentic AI can orchestrate multi-step workflows, adapt to changing environments, and make decisions by leveraging tools and data to complete complex objectives.

Agentic AI



AVID PLATFORM



AGGREGATE

All donor data in one place



VISUALIZE

The entire donor journey



IDENTIFY

The best steps to drive results



DEPLOY

Personalized campaigns at scale

Smart Audience Management

Intelligent Database Powered by 650 Million+ Donor Interactions and Experiments

AI and Machine Learning Technology

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GIVING IS PERSONAL

Donors aren't numbers, they're people. Today's donors expect personal, meaningful connections to the causes they support.



THE COST OF FALLING BEHIND

- Donors expect personalization to be on par with what they get from brands like Amazon.
- Nonprofits are stuck with disconnected systems and rising costs.
- Inefficiency drains billions from critical missions, leaving them underfunded.



For decades, fundraisers have relied on past ideas to overcome these challenges — but at what cost?

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71%

of donors said personalization makes them feel more engaged.



The Nonprofit Times, Donor Loyalty study

THE OUTCOME?

Inappropriate asks & impersonal follow-up lead donors to opt out.

Resulting in:

- ✗ **Lost donors**
- ✗ **Stalled mission**
- ✗ **Stressed teams**

Source: The Fundraising Effectiveness Project

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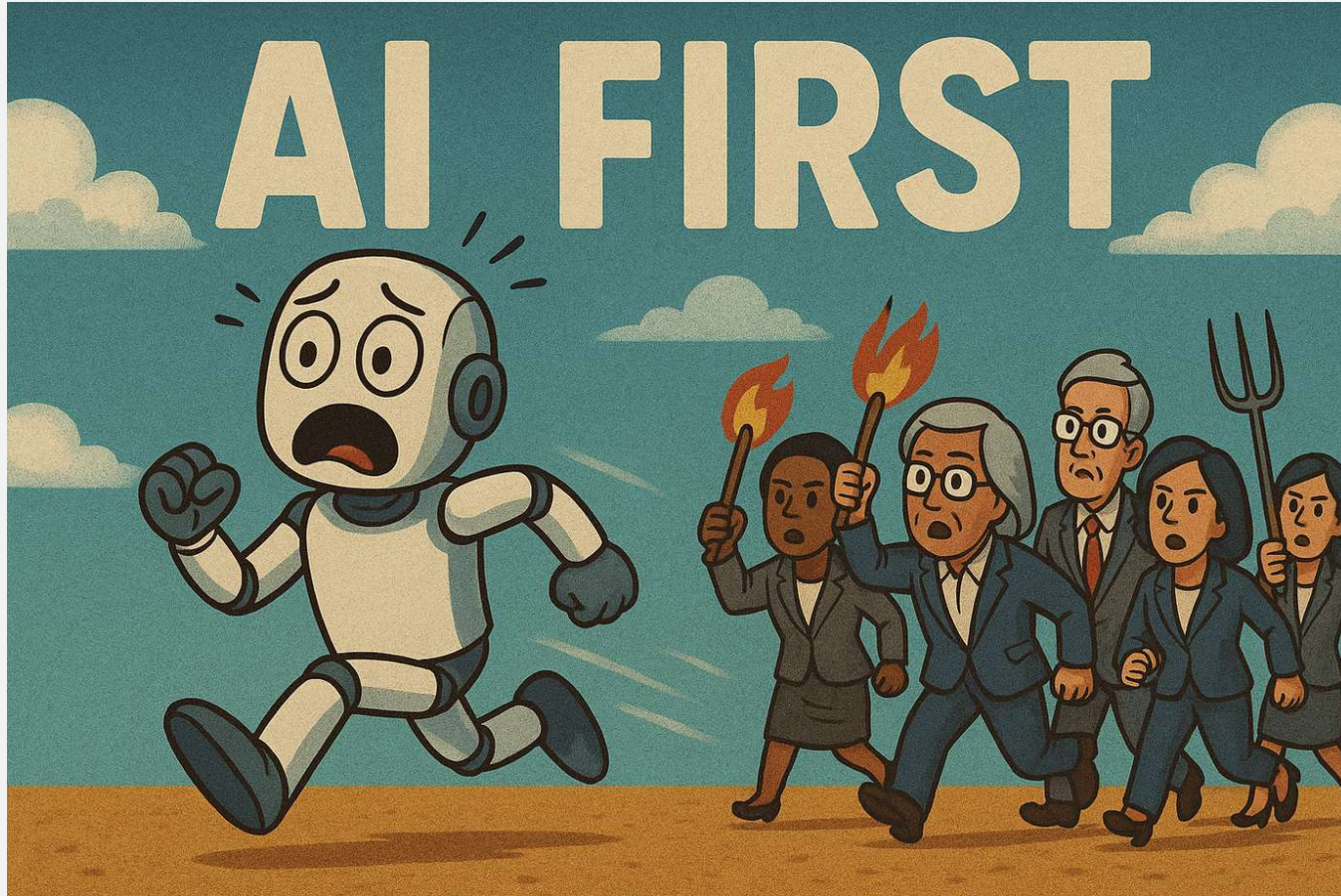
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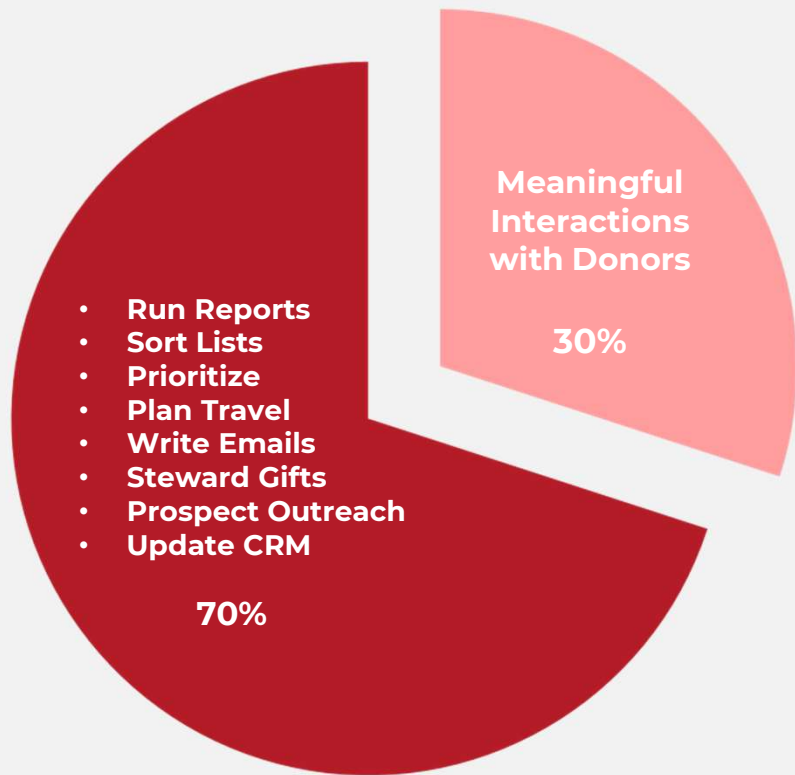


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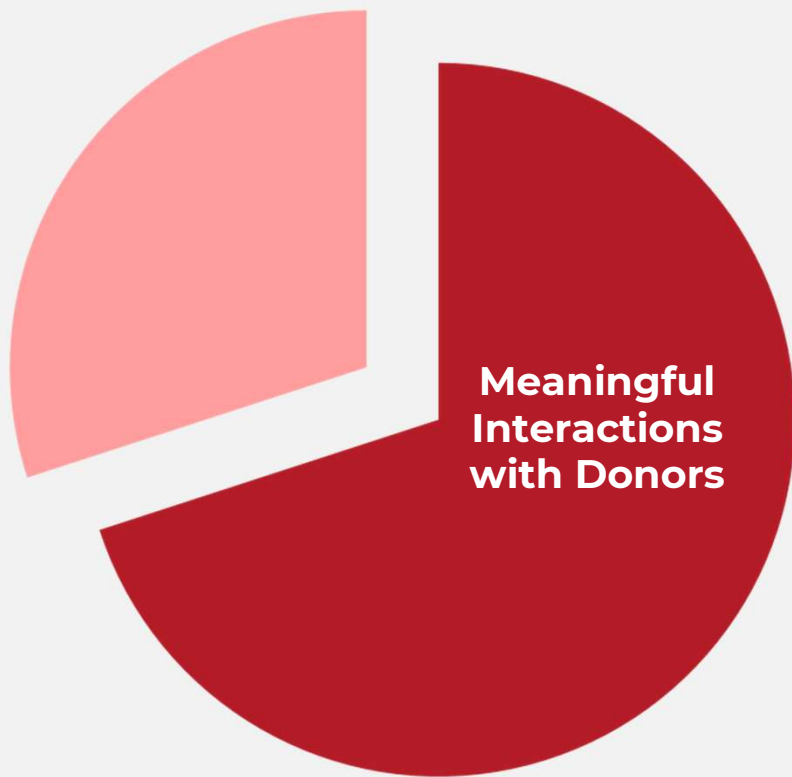


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The #1 challenge fundraising teams face is.... the **lack of time prioritization**



What if you could significantly increase your output—**doubling or even tripling it**—without having to put in extra work or time?

Agenda

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- ❑ **Reframe AI - The Empathy Amplified**
- ❑ **Write for Understanding - Clarity Over Cleverness**
- ❑ **Research Smarter - AI as your Assistant**
- ❑ **Storytelling at Scale - Turning One Legacy into Many Voices**
- ❑ **Steward Responsibly - Ethics, Guardrails, and Human Oversight**

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THE REAL PROBLEM ISN'T AWARENESS - IT'S LAG

- Donor intent gets lost in the data shuffle.
- Staff turnover resets relationships.
- By the time insights arrive, the moment has passed.



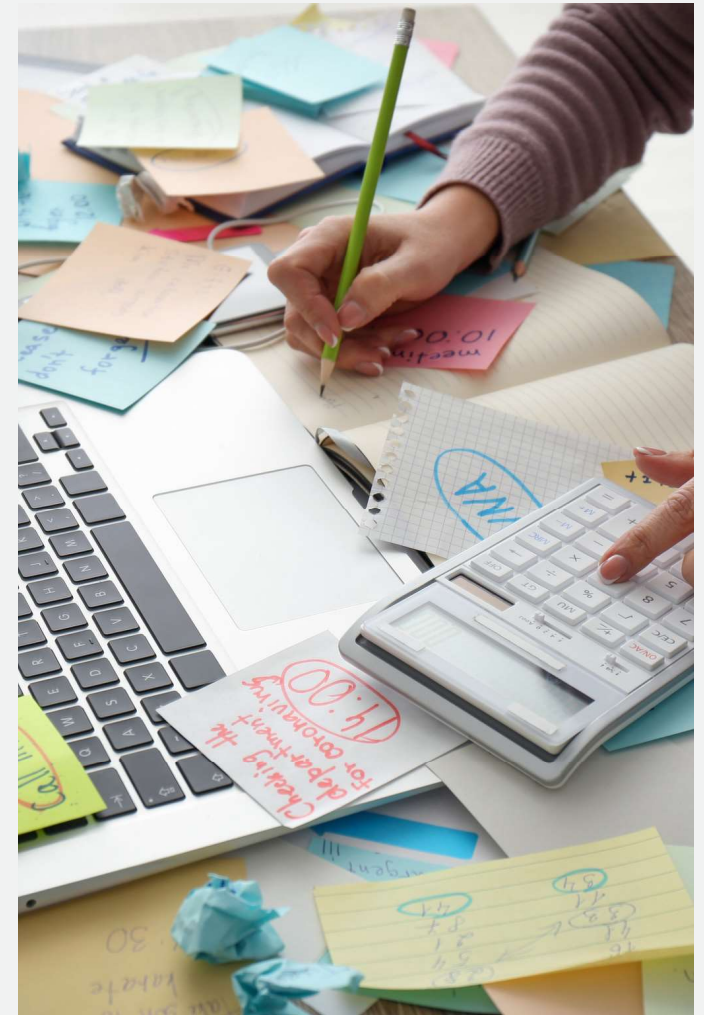
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**So what if we could use AI not
to replace fundraisers, but to
reclaim time for what matters
— human connection?**

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FROM NOTES TO KNOWLEDGE: WHAT ARE DONORS SAYING

- You already have the data — it's just trapped in notes and emails.
- See what donors actually care about.
- Group similar donors for clearer, more empathetic outreach.





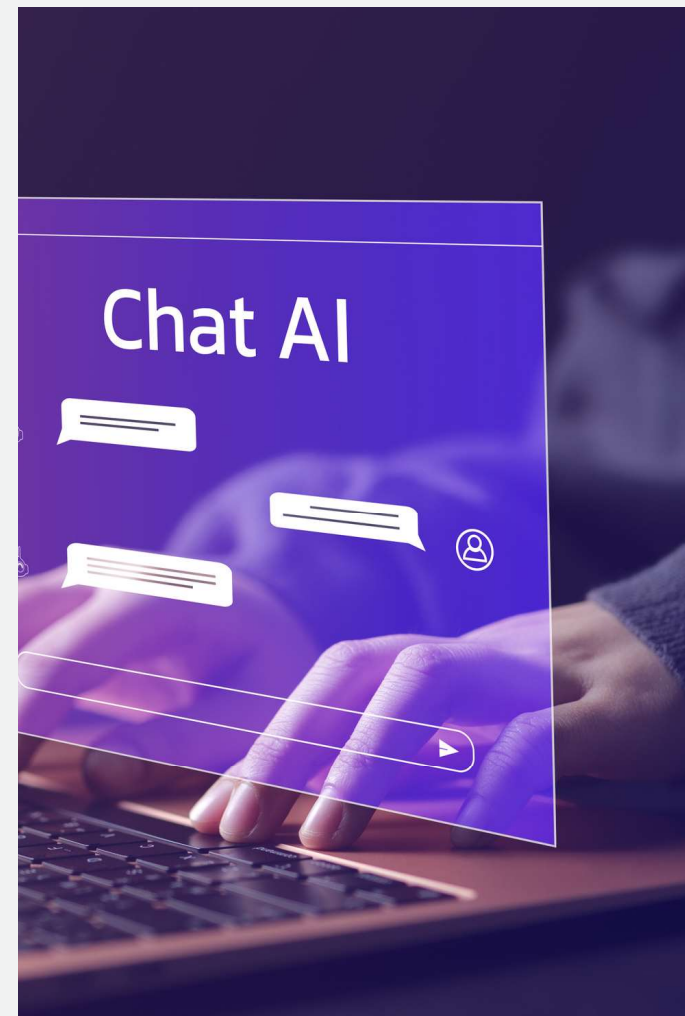
AI PROMPT - LIVE

Prompt:

"You're a planned giving officer at XYZ, and here is my org's URL. Please analyze these donor visit notes that I will copy after this.

For each note, identify:

1. The donor's life stage or context (retirement, caregiving, early career, etc.)
2. Their emotional or motivational themes (family, faith, gratitude, financial security, legacy, etc.)
3. What they are actually saying beneath the surface (the human insight).
4. The recommended communication tone (educational, empathetic, inspirational, etc.).
5. One suggested next step (resource, conversation, or follow-up idea).
6. Return it as a simple table: Donor | Life Stage | Themes | What They're Really Saying | Tone | Next Step."





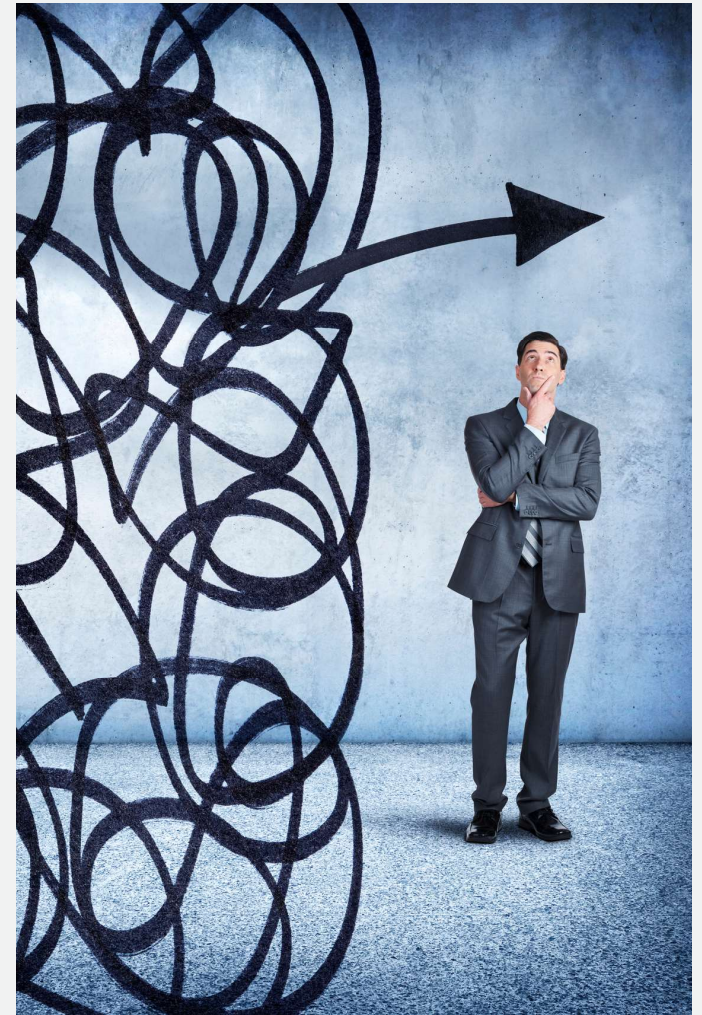
**Access to the chatbot ChatGPT
decreased workers' time to
complete tasks by 40 percent.**

MIT News-Study finds ChatGPT boosts worker
productivity for some writing tasks

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WRITE LIKE YOU SPEAK - SO DONORS ACTUALLY HEAR YOU

- Donors don't need clever—they need clear and human.
- AI can help you rewrite messages at the right reading level and tone for older or legacy-minded audiences.



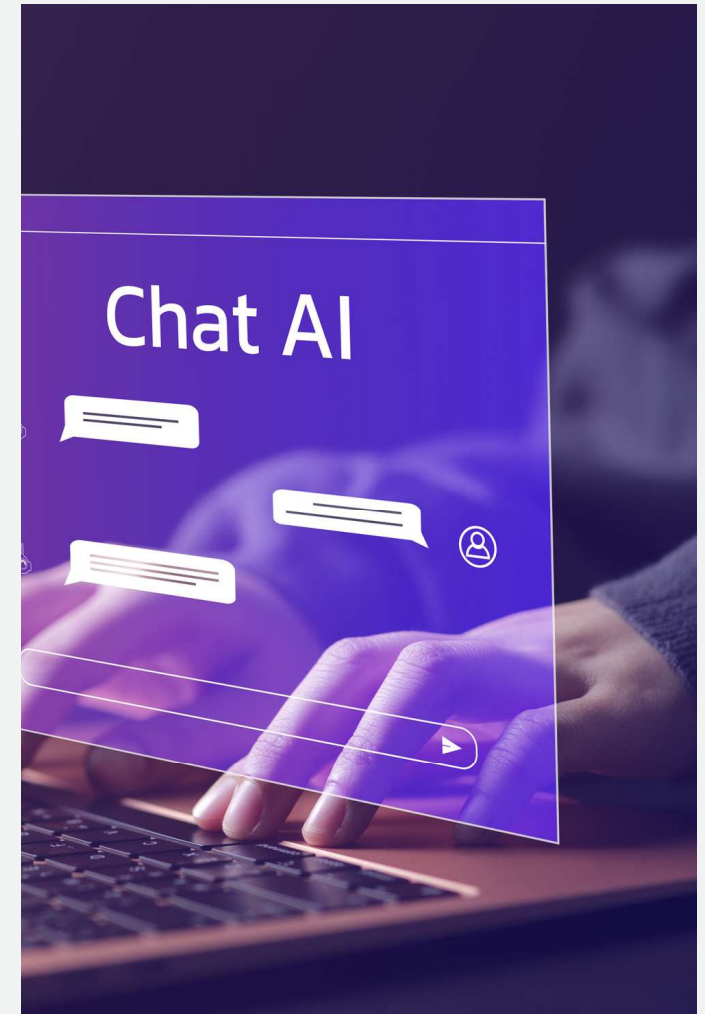
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AI PROMPT

Prompt:

“You’re a planned-giving copy editor.
Rewrite this email for clarity and warmth.

- Keep dignity and gratitude.
 - Use an 8th-grade reading level.
 - End with one gentle, specific next step.
1. Return two subject-line options and a short preview text.”

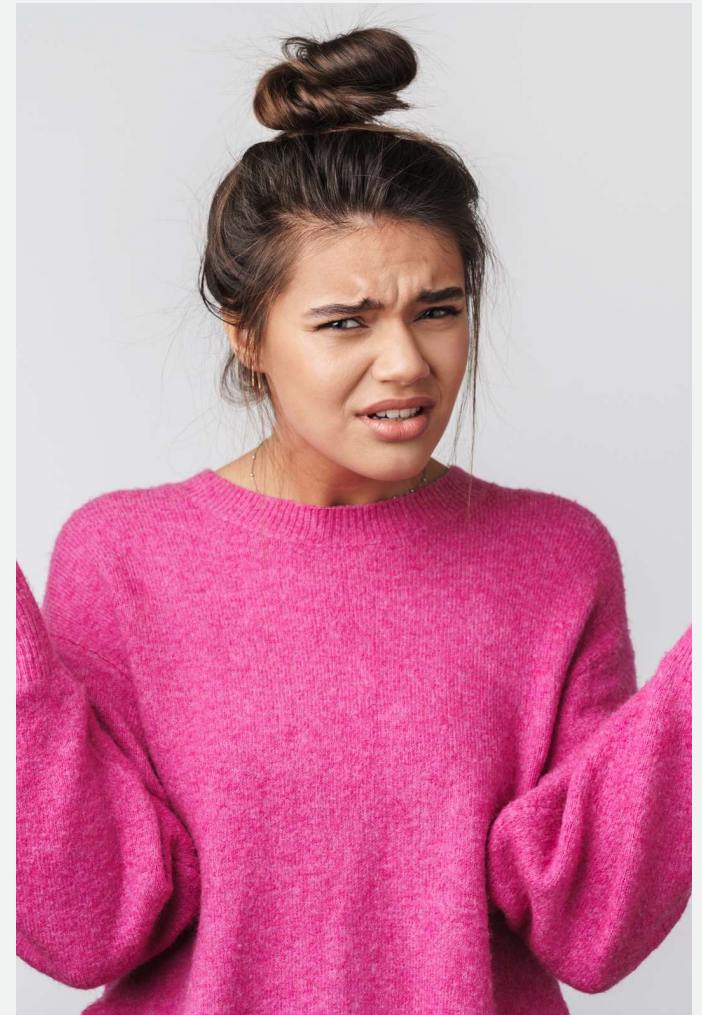


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RESULTS

Before:

We invite you to explore the opportunity to include our organization in your estate planning strategy, ensuring your philanthropic priorities are achieved in perpetuity.



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RESULTS

After:

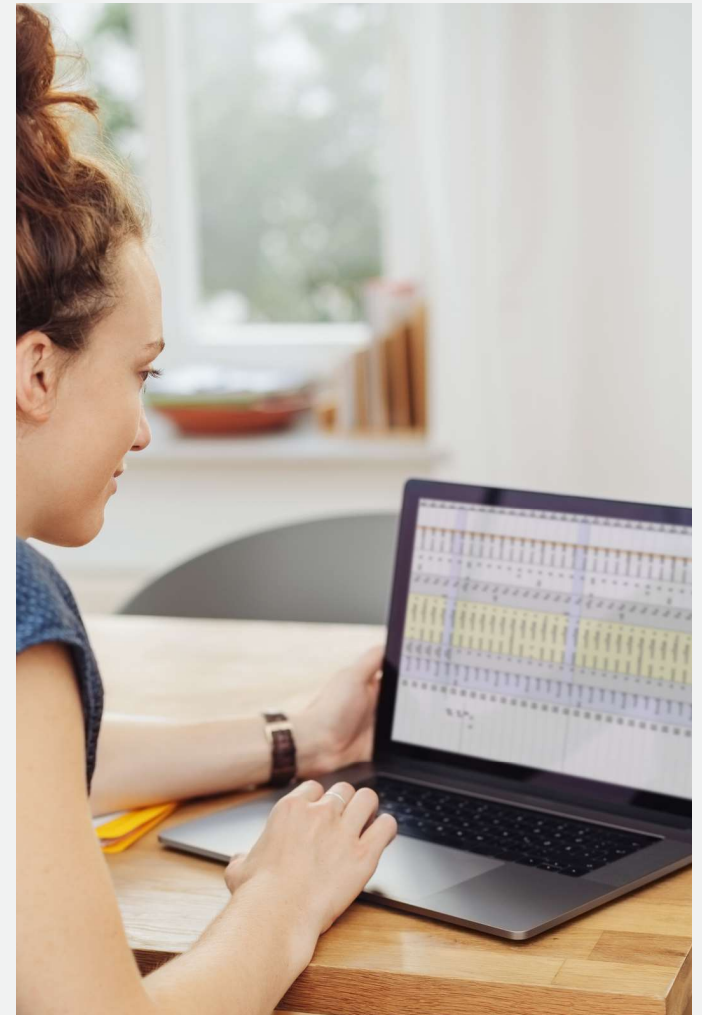
You've already made such an impact with your giving. Many supporters choose to continue that care by adding [Org] to their will or beneficiary list. It's simple—and it keeps your generosity alive for future families.



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FROM GUESSWORK TO GUIDANCE: LET AI HANDLE THE HEAVY LIFTING

- Fundraisers spend hours sorting spreadsheets; AI can do that in seconds.
- Summarize donor data or call notes.
- Identify shared motivations or life-stage clues.
- Recommend next steps based on patterns.



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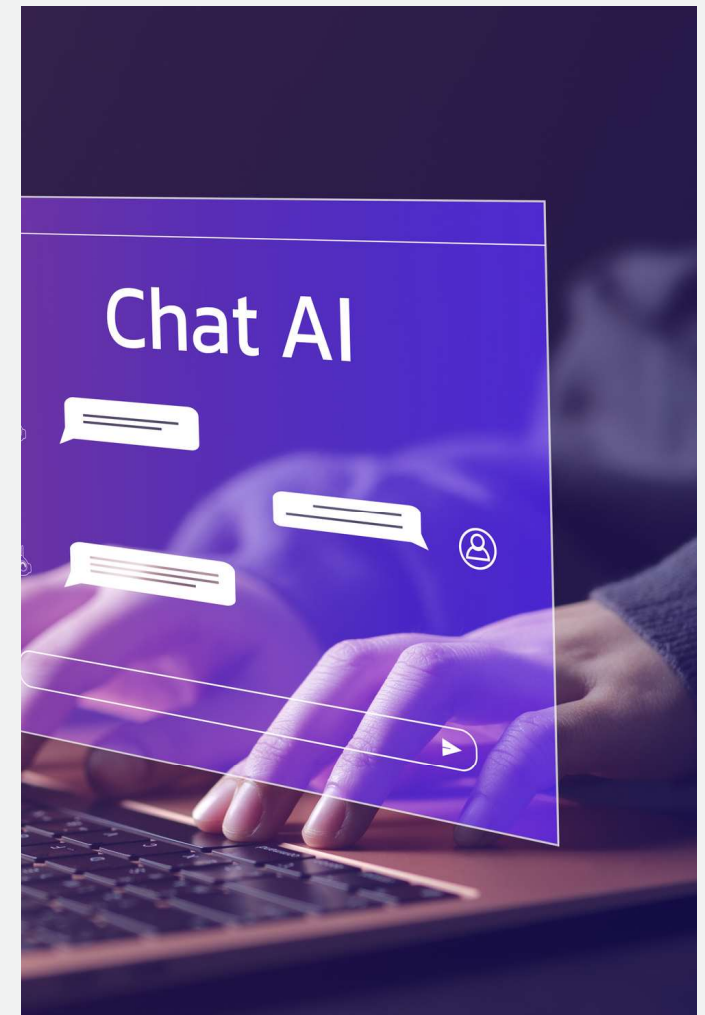
AI PROMPT

Prompt:

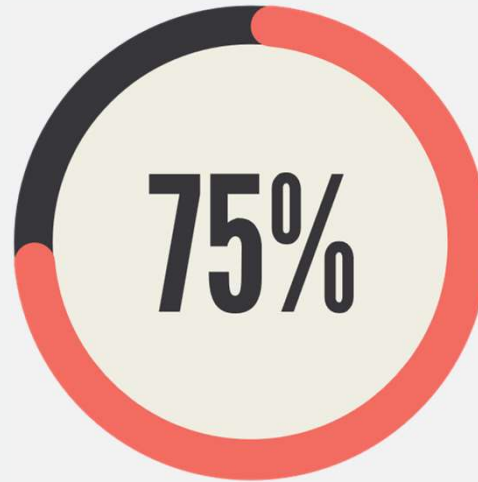
"You're a fundraising analyst. Review these anonymized donor records or notes.

Identify common themes (family, faith, community, legacy).

Group similar donors together and suggest one message or campaign theme for each group."



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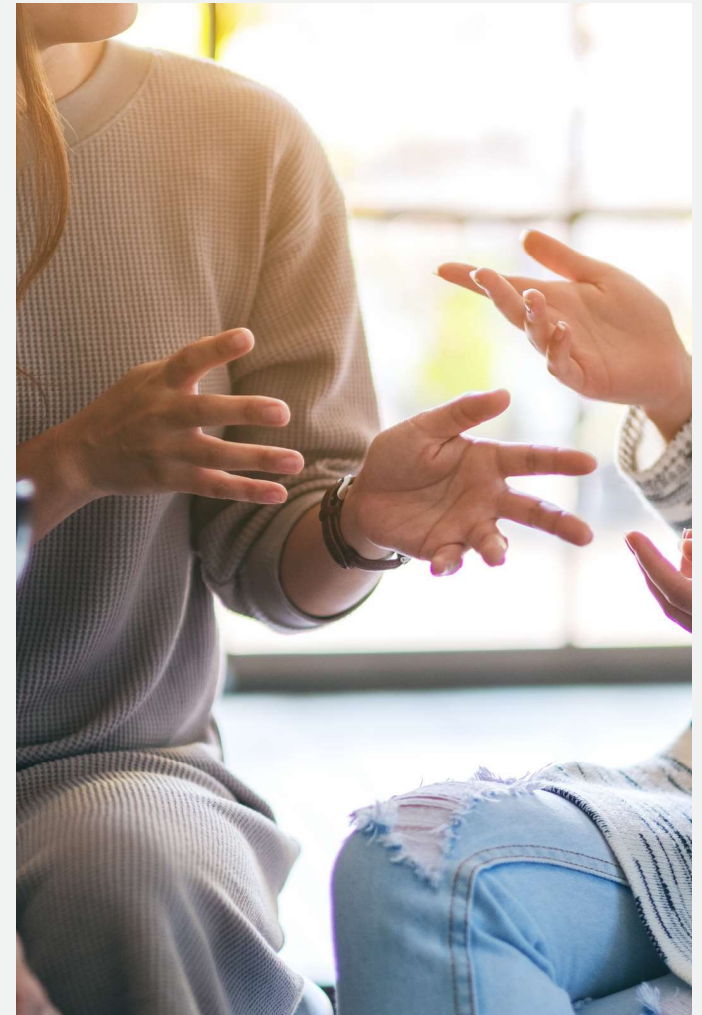
**of generative AI users are
looking to automate tasks at
work and use it for work
communications**

Salesforce report-Top AI stats for 2023



ONE DONOR STORY, TEN WAYS TO TELL IT

- Every fundraiser has one great donor story — AI helps you multiply it.
- You stay in control of the message — AI just handles the format.
- When donors see themselves in others' stories, intent turns into action.



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ONE DONOR STORY, TEN WAYS TO TELL IT

- “Take this donor story and rewrite it for multiple formats:
- 250-word print newsletter story
- 100-word email feature
- 60-second video script
- 40-word social caption
- Keep the donor’s voice authentic and focus on legacy, values, and impact.”



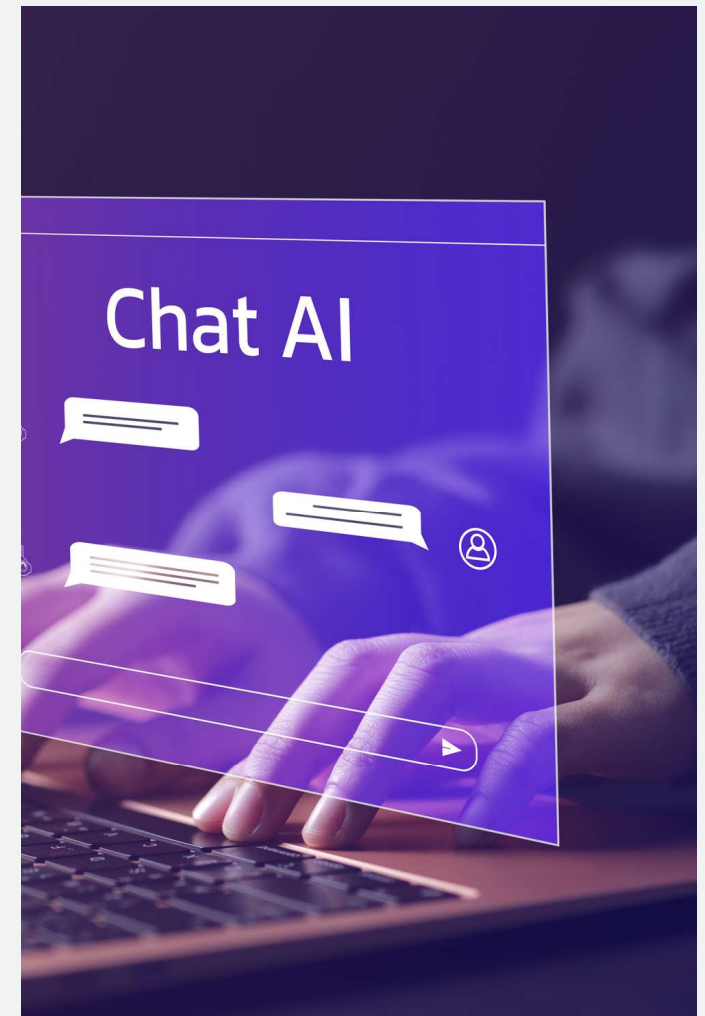


AI PROMPT - LIVE

Prompt:

"I am a planned giving officer trying to engage with prospective planned giving/legacy donors. I would like them to either fill out a survey or connect in person to talk further about their experience with Drake. Can you take this URL

<https://plannedgiving.drake.edu/supporters-like-you> of Planned Giving Donor stories, and I have three donor age categories, Millennial, Gen X, and Baby Boomer, all graduates, can you sort these stories for each, provide copy of an email I could send them to accomplish my goals, and then a link to the story with a short summary teaser within the email copy of why they should be interested and read the story?"



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6+ hours

time saved per week if repetitive aspects of
your job was automated

McKinsey Global Institute

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USING AI RESPONSIBLY: TRUST IS THE ULTIMATE CURRENCY

- Donor trust is earned through clarity, not complexity.
- Transparency builds confidence—tell supporters how you use tools, not just that you use them.
- Governance isn't a barrier—it's a differentiator.



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Privacy and Security	→
Data Ethics	→
Inclusiveness	→
Accountability	→
Transparency and Explainability	→
Continuous Learning	→
Collaboration	→
Legal Compliance	→
Social Impact	→
Sustainability	→



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FIVE WAYS TO START - AND SEE RESULTS IN 30 DAYS

Week 1 — Clarity: Rewrite one stewardship email using AI.

Week 2 — Insight: Analyze 10 donor notes → surface 3 common themes.

Week 3 — Story: Repurpose one donor story into 3 formats.

Week 4 — Guardrails: Draft your team's one-page "Responsible AI Checklist."



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7 PROMPTS TO USE AS A PLANNED GIVING OFFICER

Scan me



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GIVING IS PERSONAL

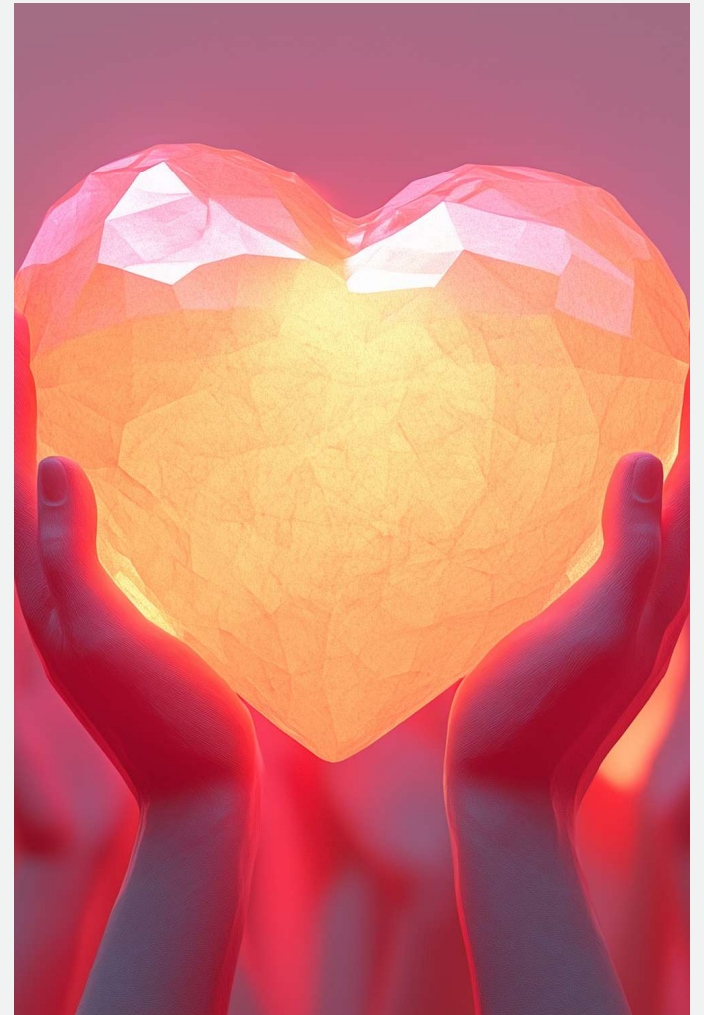
Giving reflects who we are, what we care about, and the stories and emotions that shape our connection to a cause.



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AI WON'T REPLACE FUNDRAISERS

But fundraisers who use AI — along with empathy, curiosity, and insight — will replace those who don't.



AI helps us:

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- ✓ Listen at scale
- ✓ Write with clarity
- ✓ Act with insight
- ✓ Steward with integrity

It's not about being more automated.
It's about being more available to people
who trust us.

Your next steps:

- ✓ Rewrite one donor message.
- ✓ Analyze one set of visit notes.
- ✓ Test one story across channels.

Small wins compound -
and build confidence.



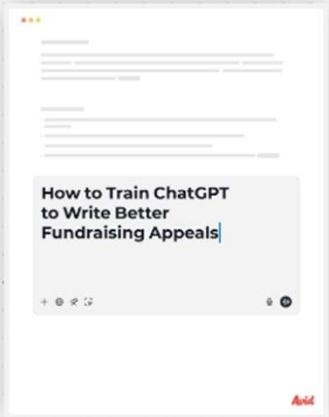
FREE DOWNLOAD

How to train ChatGPT to write better fundraising appeals.

A free, step-by-step guide for fundraisers who want to use ChatGPT effectively—without losing their voice or sending bland, generic appeals.

What's inside:

- ✓ A plug-and-play prompt template for training ChatGPT on your brand voice
- ✓ Step-by-step instructions for crafting better appeals in less time
- ✓ Practical guidance to avoid robotic language and create copy that converts



First name*

Last name

Email*

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THANK YOU

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