



AutoInsights **For Fundraising & Charities**

*Empowering Fundraisers. Protecting
Compliance. Inspiring Donors*

The Challenge in Fundraising Contact Centres



- **Balancing Empathy and Compliance:** Fundraising teams must simultaneously be persuasive, emotionally intelligent, and compliant—every call demands all three.
- **Ineffective Manual QA:** Less than 5% of calls are manually reviewed, missing vital insights into performance, compliance, and donor sentiment.
- **Inconsistent Messaging:** High staff turnover and onboarding challenges lead to uneven delivery of campaign narratives and calls-to-action.
- **Heightened Risk Environment:** Fundraising operates under strict regulations and high public scrutiny, making compliance lapses costly.
- **Proving Value to Clients:** Campaign managers struggle to demonstrate ROI, quality, and impact to their charity partners without granular data.

Fundraising contact centres face a complex web of operational challenges. At the heart of their work is the delicate balance between empathy and compliance—agents must connect emotionally while staying within strict regulatory frameworks.

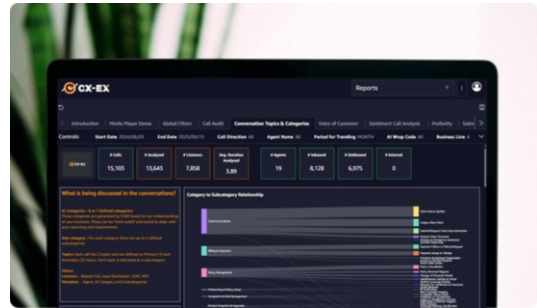
The reality is, most organisations only manually review a tiny fraction of calls—often under 5%—which leaves massive blind spots. Add in high fundraiser turnover and variability in messaging, and it's clear why consistency and quality suffer.

Meanwhile, the pressure to prove campaign effectiveness to charity clients intensifies. Without scalable QA and concrete performance data, it's hard to demonstrate impact or manage risk. These are the pain points that demand smarter solutions.

Introducing AutoInsights



- **AI Reviews 100% of Calls:** AutoInsights performs post-call analytics on every fundraising interaction, uncovering patterns missed by manual QA.
- **Comprehensive Insight Delivery:** Generates insights across QA, sales effectiveness, compliance, and emotional storytelling — all in one platform.
- **Data-Driven Coaching:** Provides personalised coaching reports to help fundraisers develop faster and with more confidence.
- **Seamless Integration:** Easily connects with current diallers, CRMs, and call recording tools — no disruption to existing operations.
- **Rapid ROI:** Affordable, low-risk solution delivering immediate benefits through automation and quality improvement.



AutoInsights for Healthcare

Introducing AutoInsights — a game-changing AI-powered platform built specifically for fundraising contact centres. It analyzes 100% of donor interactions post-call, unlocking a level of insight and consistency never before possible.

With AutoInsights, you're no longer limited to manual reviews or sporadic feedback. You get deep analytics across compliance, sales effectiveness, and even storytelling. It's a powerful tool for fundraisers and managers alike.

Deployment is smooth and non-disruptive. With easy integration into existing systems and a low cost of entry, AutoInsights delivers immediate ROI. It's not just analytics — it's a complete framework for smarter, more effective fundraising.

Use Case 1: Quality Assurance & Coaching at Scale



- **Automated Call Review:** Analyzes every call for compliance, empathy, script adherence, and tonal consistency, replacing manual sampling.
- **Structured QA Reporting:** Delivers weekly QA summaries and monthly performance dashboards for all fundraisers and campaigns.
- **Compliance Gap Identification:** Flags missing disclosures, incorrect phrasing, and high-risk calls for review.
- **Reduced Manual Workload:** Cuts QA labour time by up to 90%, freeing teams to focus on feedback and development.
- **Faster Feedback Loops:** Improves coaching quality and turnaround time, enabling data-driven growth.



AI Quality Management on AutoInsights

Let's explore our first major use case: QA and Coaching at Scale. Manual quality assurance, while well-intentioned, barely scratches the surface — reviewing only a sliver of conversations and delaying feedback.

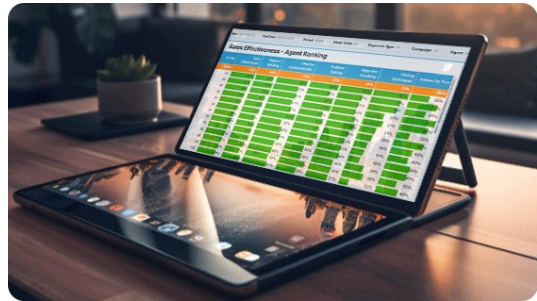
AutoInsights automates this process, analyzing 100% of interactions. The system generates structured, actionable QA summaries that highlight compliance gaps, empathetic delivery, and script adherence. This empowers QA teams to focus less on data collection and more on development.

The impact is profound: up to a 90% reduction in manual QA hours, real-time feedback cycles, and consistent coaching that drives fundraiser growth and retention. It's transformation at scale.

Use Case 2: The Ask & Sales Effectiveness



- **Evaluating Fundraiser Delivery:** Tracks tone, confidence, timing, and language during the critical Ask moment to assess effectiveness.
- **Conversion Value Insights:** Monitors Ask Structure (\$15 / \$25 / \$40) and correlates them to donation conversion metrics.
- **Objection Handling Analysis:** Measures how fundraisers respond to refusals and their success in re-engaging potential donors.
- **Top Performer Identification:** Highlights successful techniques and models that can be replicated across teams.
- **Storytelling Enhancement:** Improves fundraiser confidence by coaching empathy and impactful donor narratives.



The Ask & Sales Effectiveness for Product-Specific AutoQA

The Ask is where fundraising happens — and it’s also where many calls falter. This use case focuses on enhancing fundraiser sales effectiveness, particularly during the crucial moments of making the ask.

AutoInsights measures how that Ask is delivered — tracking voice tone, timing, and language confidence. It doesn’t stop there; it also correlates these with different donation ask levels and conversion outcomes.

By analyzing how objections are handled and identifying patterns in successful conversations, AutoInsights empowers teams to refine delivery, build storytelling capacity, and ultimately improve donor conversion rates. It’s behavioural science at scale.

Use Case 3: Compliance & Risk Monitoring



- **Automatic Detection of Risks:** System flags missed greetings, prohibited phrases, and incorrect disclosures in real-time call reviews.
- **High-Risk Call Alerts:** Alerts QA teams to urgent calls requiring manual intervention or escalation based on risk criteria.
- **Audit Trail Creation:** Maintains complete traceability for all monitored calls, supporting internal reviews and regulatory audits.
- **Reduced Donor Complaints:** Proactive monitoring mitigates issues before they escalate, protecting donor relationships.
- **Agency-Client Assurance:** Enables agencies to demonstrate rigorous oversight and accountability to their charity clients.



Tracking Compliance word by word in AutoInsights

Compliance is mission-critical in the fundraising industry. One misstep in a call—whether it’s a missed disclosure or a prohibited phrase—can trigger serious consequences for both agencies and clients.

AutoInsights automates compliance monitoring by detecting risk-related issues across 100% of calls. It flags high-risk conversations in real time and provides QA teams with alerts for immediate review. This reduces exposure and improves the reliability of operations.

Most importantly, AutoInsights preserves a full audit trail, offering clients and regulators alike the assurance that every call is accounted for. It’s a system built for transparency, accountability, and protection.

Use Case 4: Campaign & Client Dashboards



- **Cross-Campaign Visibility:** Dashboards enable comparisons across teams, campaigns, and clients—QA scores, sentiment, and conversions at a glance.
- **Trend Monitoring:** Track fundraiser performance, compliance trends, and donor objections over time for strategic adjustments.
- **Visual Reporting:** Provides board-ready summaries and client-friendly visuals for stakeholder presentations.
- **ROI Demonstration:** Empowers campaign managers to present clear, evidence-based performance outcomes.
- **Transparent Client Relations:** Strengthens trust and accountability by offering clients real-time access to campaign health.



Campaign & Client Dashboards in AutoInsights

Campaign managers often face fragmented data and blind spots across their fundraising operations. AutoInsights resolves this with powerful, unified dashboards.

These dashboards provide a complete view of QA, sentiment analysis, conversion performance, and compliance across multiple campaigns. You can see which teams are thriving, what objections are trending, and how fundraisers are evolving over time.

This visibility helps managers demonstrate ROI clearly, prepare insightful reports for boards or clients, and foster trust through transparency. It turns abstract quality conversations into measurable outcomes.

Use Case 5: Coaching Enablement & Feedback Loop



- **AI Coaching Commentary:** Generates call-specific coaching insights, with transcript evidence to guide development.
- **Curated Audio Highlights:** Includes 'Best Call' and 'Coaching Call' clips in reports to demonstrate excellence and growth areas.
- **Automated Report Delivery:** Pushes weekly or monthly personalised coaching packs to each fundraiser.
- **Rapid Feedback Turnaround:** Reduces the feedback cycle from weeks to hours, fostering timely improvement.
- **Culture of Growth:** Supports continuous learning and professional development across teams.

Coaching in fundraising has traditionally been reactive — based on scattered notes or memory. AutoInsights transforms this into a proactive, data-driven process.

By using AI to analyze calls, it generates specific commentary for each fundraiser, linked to call transcripts and even embedded audio snippets. These help coaches and agents alike learn from real examples and understand what great sounds like.

The feedback loop is now immediate — weekly or monthly reports go directly to individuals, complete with best practice examples and improvement areas. This builds a culture of continuous learning that scales across your teams.

Benefits Summary for Fundraising & Charities



- **Save Time:** Automate QA and eliminate the need for labor-intensive manual reporting processes.
- **Improve Coaching:** Deliver targeted, personalised feedback with AI-driven insights and performance metrics.
- **Increase Conversions:** Identify and replicate top-performing behaviours to boost donor engagement and giving.
- **Enhance Compliance:** Monitor all calls for prohibited language and disclosure lapses to reduce risks.
- **Prove ROI:** Use dashboards to show clients performance improvements and campaign quality.

The benefits of implementing AutoInsights in fundraising are both immediate and far-reaching. From operational efficiency to improved donor experience, the impact touches every part of the contact centre workflow.

Time is saved through automated QA and reporting. Coaching becomes smarter and more personalised, and conversion rates rise as top behaviours are identified and emulated. Compliance is no longer a guessing game — it's actively monitored.

Ultimately, AutoInsights empowers fundraisers, reassures clients, and proves ROI with evidence. This isn't just a tool — it's a performance transformation framework.

Case Example (Anonymised)



- **National Fundraising Agency:** Reduced QA review time by 85% through automated insights. Compliance dashboards prevented breaches and improved coaching speed.
- **Weekly Summary Impact:** Live QA summaries enabled near-real-time coaching sessions, shifting the focus from detection to development.
- **Client Testimonial:** "The reports save hours of work and give us immediate visibility into quality."
- **Major Charity Campaign:** Improved ask confidence and conversion rates via emotion analytics and storytelling analysis.
- **Agent Report Transformation:** Monthly agent reports structured one-on-one coaching and sparked meaningful development conversations.

The proof of AutoInsights lies in the outcomes delivered for clients across the sector. These anonymised case examples highlight the impact at scale.

For a national fundraising agency, manual QA was slashed by 85%, with AI dashboards eliminating compliance breaches and accelerating coaching. Weekly summaries offered near-live insight, completely reshaping how quality was managed.

In a major charity campaign, AutoInsights helped boost fundraiser confidence and conversions by analyzing storytelling and emotion. Coaches now run structured sessions driven by monthly agent reports — and the result is clear: better quality, stronger engagement, and proven ROI.

Appendix Slide

CXEX has worked on building various reports for the clients to ensure they're aware of each aspect of their business. However, for Fundraisers & Charities we've only one report:

- **Charity Sales Performance Report** – Provides weekly and monthly insights into agent behavior, presenting performance trends, strengths, and improvement areas in a clear, actionable format.

The reports work together to provide a complete picture and enable top leadership to improve quality, efficiency, and long-term sales strategy.

Charity Sales Performance Report



- Summarizes monthly sales performance for an individual agent and benchmarks it against team averages to reveal variance and trend.
- Breaks down core behaviours (introduction, rapport, ask process, closing, objection handling) with category scores and pass rates to pinpoint where the flow falters.
- Maps objection patterns with overcome rates to target coaching on specific blockers like alternative funding, security, and email preferences.
- Delivers actionable coaching guidance and sample call links (best vs. coaching calls) so managers can model success and correct weaknesses immediately
- Tracks QA score, talk time, and step-level metrics (first/second/third ask, smooth transitions, repeated requests) to connect behaviours to outcomes.