

DATASHEET

VANILLASOFT FOR DXO & LEADERSHIP GIVING

VanillaSoft is a comprehensive donor engagement and workflow management solution that enables Donor Experience Officers (DXOs), Leadership Annual Giving Officers (LAGOs) and others to deliver highly personalized, donor-centric experiences at scale. VanillaSoft's unique queue-based workflow continually evaluates constituent profiles, prioritizing those most likely to engage, meet, and donate first for maximum return on program investment.

FEATURE	BENEFITS
Cadence-driven workflow	The cadence-driven workflow manages your communication and engagement schedule, automatically delivering the right constituents to fundraisers at the right time, allowing them to effortlessly and consistently deliver intentional, omnichannel donor journeys at scale.
Prioritization routing queue	VanillaSoft's Intellective Routing continually prioritizes constituents based on geographic, biographic, psychographic, firmographic, and all other available data points. Fully customizable to the needs, priorities and objectives of the officer, Intellective Routing filters work within the established cadence to ensure you're delivering the "next best" constituents to the right fundraiser, at the right time, for the greatest results.
Result Codes	Customizable result codes allow officers to automatically trigger multiple cadence actions after each engagement attempt. With the click of a button, officers can trigger multiple different actions, from automatically sending personalized follow-up emails and text messages, to scheduling reminders and callbacks, to updating the constituent profile based on where they're at in the pipeline.
Dynamic Call Scripting	Dynamic scripting helps even your least experienced officers adapt to objections at each stage of journey. Completely customizable for each campaign, scripts deliver instructions and prompts for each situation while also enabling officers to quickly capture new information.
Reporting & Tracking	Analyze individual, channel, or segment performance with VanillaSoft's advanced reporting tool. Track real-time efforts with an interactive dashboard and keep your officers informed of their progress with access to their stats page and results.
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Appointment Setting	Integrate calendars, set appointments, and schedule reminders for meetings with qualified opportunities.
Unified Interface	VanillaSoft provides a single, cohesive interface for relationship building via multiple channels to help you avoid wasted time navigating a multi-tool tech stack.

BROADER APPLICATION

VanillaSoft also supports Engagement Centers and student employees.

Learn more at: <https://vanillasoft.com/fundraising>

ACCESSIBILITY

- VPAT
- WCAG 2.1

COMPLIANCE

- HIPAA
- PCI DSS
- SOC 2 TYPE 2
- STIR/SHAKEN
- Full Attestation (A)

