

## SOLUTION BRIEF

# VANILLASOFT FOR DXO & LEADERSHIP GIVING

VanillaSoft is a comprehensive donor engagement and workflow management solution, enabling fundraisers such as Donor Experience Officers (DXOs) and Leadership Annual Giving Officers (LAGOs) to deliver highly personalized, donor-centric experiences at scale. VanillaSoft's routing queue and cadence-driven workflow bring complex donor journeys to life, allowing you to build your pipeline and increase fundraiser efficiency and effectiveness.



## SUSTAINABLE PIPELINE-BUILDING

VanillaSoft's routing queue and cadence-driven workflows are perfectly designed for "top of funnel" pipeline development, from warming colder constituents to nurturing those that aren't quite ready to move to the next level. Create a sustainable donor pipeline by prioritizing the best constituents and cultivating intentional, lasting relationships with donors.

## HIGHLIGHTS

### ENGAGE DONORS

Craft omnichannel donor engagement journeys with phone, email, SMS, and video.

### EFFICIENT CULTIVATION

Eliminate unnecessary downtime and increase outbound activities to execute donor cultivation strategy.

### PERSONALIZE

Seamlessly deliver meaningful, personalized communications at scale.

### PRIORITIZE

Effortlessly segment, prioritize, and deliver constituents to your gift officers.

### ANALYZE

Monitor and evaluate performance with advanced reporting tools.

### OPTIMIZE

Make informed decisions based on results to optimize performance.

### MAXIMIZE

Increase the quality and quantity of interactions for maximum ROI.



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### STRATEGIC PRIORITIZATION

Intellective Routing and geolocation filters dynamically prioritize constituents based on program needs, priorities, and goals. Reference prior giving behavior, engagement data, geographic location, channel preferences, or any other data point you prioritize. With VanillaSoft, you're always connecting with the best available constituent, via the best possible channel, at the best possible time.

### EMPOWERING USERS

VanillaSoft empowers admins and fundraisers alike to build, adjust, and ultimately perfect donor engagement workflows across a combination of phone, email, SMS texting, and even video. Complete customization and flexibility over constituent segmentation and priority – coupled with VanillaSoft's live performance dashboards and advanced reporting tool - allows for performance evaluation and informed adjustments to outreach and engagement.

### EFFICIENT & EFFECTIVE ENGAGEMENT

VanillaSoft's cohesive platform offers fundraisers a multitude of fully integrated channels, empowering fundraisers to blend fully personalized, semi-personalized, and automated communications for maximum engagement effect. Our single, intuitive interface also removes time lost to navigating a multi-tool tech stack-which can cost users as much as four hours a week or five working weeks a year.

### MAXIMIZING RETURN ON INVESTMENT

VanillaSoft's holistic approach to donor engagement allows you to simultaneously increase the quality and quantity of your interactions, and in turn, maximizes fundraiser efficiency and effectiveness. In so doing, VanillaSoft will help you maximize overall program performance as well as the associated return on program investment.

### CUSTOMER SUCCESS

Our world-class Customer Success Managers ensure VanillaSoft customers can extract maximum value from our software from their first campaign, empowering them to turn their donor engagement dreams into reality.

### BROADER APPLICATION

VanillaSoft also supports Engagement Centers and student employees.

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



Engage More. Talk More. Raise More.

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