



StratusLIVE WEBINAR



AI Agents 101:

A New Era for Nonprofit Workflows

AGENDA

- Introductions
- AI: Why Now?
- What is an AI Agent?
- Agents vs. Chatbots
- AI Agent Access
- The Promise of Agents
- AI Agents in Action
- Ethical AI Agent Use
- Web Designer Agent in Action
- Q&A



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Awarded by CIOReview



DRIVE CHANGE AND INCREASE IMPACT WITH STRATUSLIVE

100%
Implementation
Success Rate

20+ M
Donor Profiles

+58 NPS

\$1B+
Annualized Giving

StratusLIVE's Nonprofit Industry Cloud delivers a complete, fully-integrated, enterprise-class solution for modern digital fundraising.

AI: WHY NOW?

GROWING DEMAND FOR SERVICES

77% of nonprofits had an increase in demand for services in 2024

NEED FOR IMPACT REPORTING

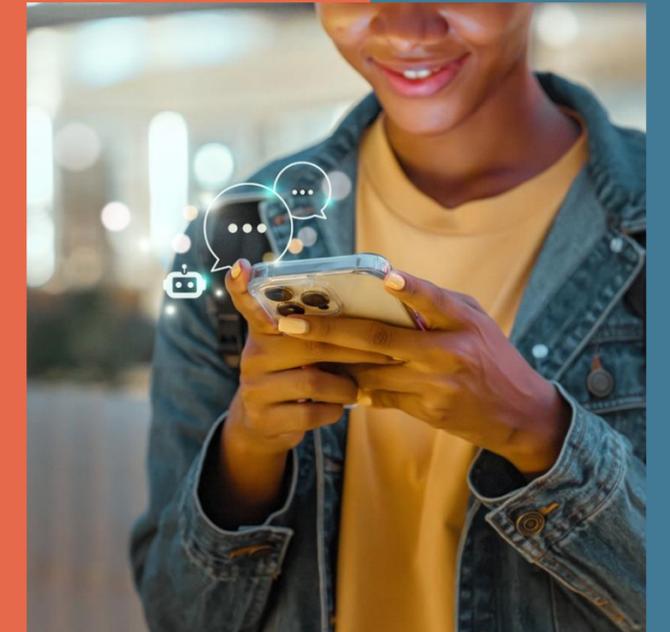
Increase donor trust through accountability and increase funding opportunities

DONOR PERSONALIZATION PRESSURE

AI-powered personalization can realize 35% higher engagement

VOLATILE FUNDRAISING ENVIRONMENT

- Declining donor retention
- Changes in federal funding
- Economic Instability
- Inflation

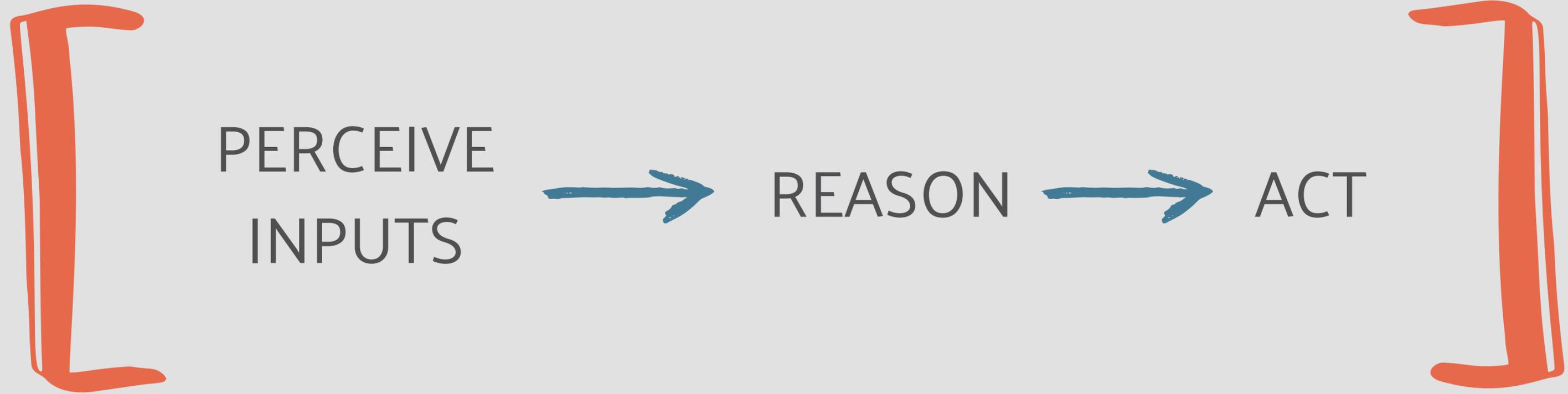




WHAT IS AN AI AGENT?

An autonomous software system that **perceives its environment, makes decisions, and takes actions** to accomplish specific tasks or goals without continuous human supervision.

THE AI AGENT CONTINUUM



ENVIRONMENT





HOW DO AGENTS DIFFER FROM CHATBOTS?

Unlike simple AI tools (IE chatbots) that respond only to direct queries, agents ...

- **Operate independently** after setup
- **Proactively monitor** conditions
- **Make decisions** based on changing conditions
- **Take actions** without requiring human approval step
- **Learn** from outcomes, successes, failures
- **Handle end-to-end processes** rather than single tasks

**An AI agent is a digital staff member —
one who never sleeps, doesn't need
training time, and helps you focus
on the work that truly matters.**

WHERE DO YOU ACCESS AGENTS?

- Platforms you already use (CRM, email marketing, volunteer management)
- Marketplaces or external platforms
- Custom-built or low-code options

- Activity
- Chat
- Teams
- Calendar
- Calls
- OneDrive
- Copilot
- ...
- Apps

Agent Store

Find agents with the expertise to help you complete complex tasks

Built by Microsoft

Visual Creator
Create stunning visuals with Microsoft 365 Copilot

Prompt Coach
Write and improve your prompts

Writing Coach
Take your writing to the next level with Writing Coach

Idea Coach
Plan and navigate the brainstorming process

Career Coach
Elevate your career with Career Coach

Learning Coach
Unlock your potential with Learning Coach

Featured

Jira Cloud
Empower your team to track, update, and manage projects from Microsoft Teams.

AI Meeting Notes TeamsMaestro
Free AI note taker for Microsoft Teams. Every word, task, and decision captured!

Matter

Mural

THE PROMISE OF AGENTS

Staffing Shortages

+

Resource Constraints



Increased Productivity

+

Precise Action,
Predictable Results

Rising Donor Acquisition Costs

+

Decline in Donor Retention

+

High Donor Expectations



Personalization at Scale

PERSONALIZATION POWERED BY AI AGENTS



SCENARIO: SEGMENTING MID-LEVEL DONORS

- Identify which donors are most likely to increase their giving
- Personalize outreach based on interests and prior engagement
- Operate this at scale without requiring additional staff

CRM AGENT + FUNDRAISING AGENT

- Analyze donation frequency, recency, & amounts
- detects patterns (gave 3+ years in a row, recently increased their gift, volunteered in last year)
- **Segment A:** high-retention, high-potential donors

MATCHING GIFT AGENT

- Identifies donors whose employers offer matching gifts but haven't claimed them
- **Segment C:** matching gift potential donors

COMMUNITY + DIGITAL ENGAGEMENT AGENT

- Analyze interactions - event attendance, volunteer history, email opens
- **Segment B:** Donors with high engagement and expressed interest

TAILORED CAMPAIGNS



SEGMENT A: HIGH-RETENTION, HIGH-POTENTIAL DONORS

6 month action plan from Major Gift Officer (tour invite and impact story)

SEGMENT B: HIGH ENGAGEMENT AND INTEREST-BASED DONORS

Personalized landing page about their interest in school lunch programs with a recurring gift ask tied to back-to-school outcomes

SEGMENT C: MATCHING GIFT POTENTIAL DONORS

Sent an automated email highlighting their employer's match with one-click instructions to complete it

CRM ENGAGEMENT AGENT

Simplify data management and unlock actionable insights by automating how staff interact with their CRM

Role

- Retrieves and displays key constituent data
- Pulls key engagement metrics
- Links directly to individual contact records in the CRM
- Surfaces relevant donor data for next-step actions

Outcomes

- Faster access to critical data
- Build stronger engagement strategies
- Access actionable insights on demand



MAJOR DONOR CULTIVATION AGENT

Support nonprofit fundraisers in identifying, planning, and executing strategic engagement with major gift prospects

Role

- Analyzes donor history and behaviors to identify top prospects
- Recommends a 6-month engagement plan with next-best actions
- Suggests segmentation and impact stories
- Schedules reminders for touchpoints
- Recommends ask amounts, timing, and influencers

Outcomes

- Higher donor conversion and retention
- Fundraisers freed up for meaningful conversations



FINANCIAL GIFT PROCESSING AGENT

Simplify financial operations by guiding staff through tedious financial processes

Role

- Reviews batch imports for errors or duplicates
- Maps spreadsheet data automatically

Outcomes

- Fewer errors
- Faster posting
- Improved donor acknowledgment
- Greater consistency in financial recordkeeping



WEB DESIGN AGENT

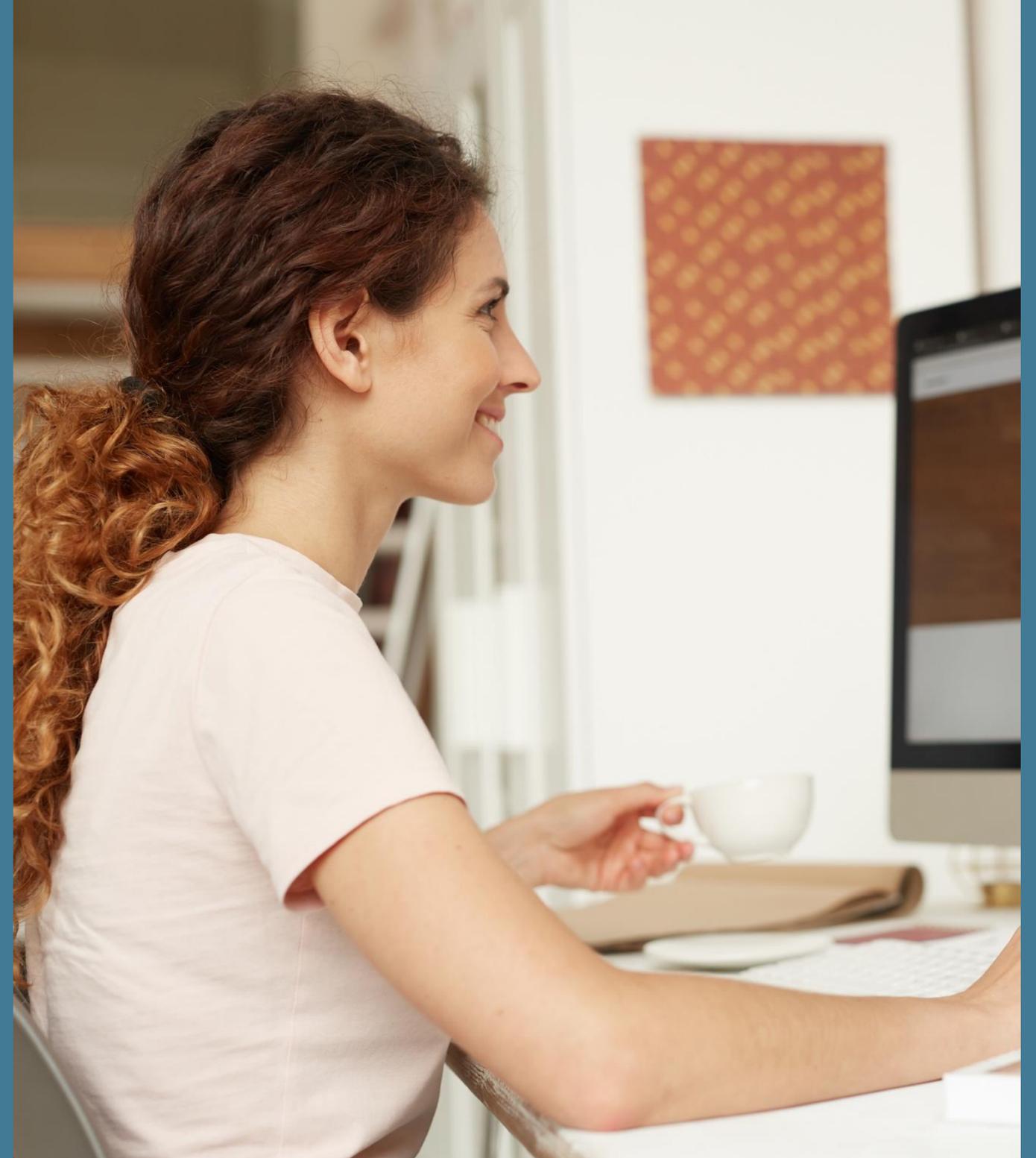
Create professional-grade, branded web content—quickly and independently

Role

- Generates full content sections or pages based on simple user instructions
- Pulls from the organization's brand definitions and previously created pages to ensure visual and functional consistency
- Incorporates hyperlinks, action buttons, and page elements that guide users to take the next step

Outcomes

- Staff with no design skills can publish pages in minutes
- Reduces need for third-party web design support



ETHICAL AI AGENT USE

ETHICAL CONSIDERATIONS

- **Equity first** – avoid outcomes that reflect biased or discriminatory data
- Quality data matters
- **Transparency** – Consider AI agent self-disclosure

PRIVACY AND DATA PROTECTION

- Non-negotiable security
- No PII shared with Public LLMs
- Private LLMs run in own data centers

ROLE OF LEADERSHIP

- Human oversight required
- Build guardrails



KEY TAKEAWAYS

- Agents differ from other AI tools
 - PERCEIVE, REASON, TAKE INDEPENDENT ACTION
- Agents operate within systems you use on a day-to-day basis
- Complete **real** use cases - donor segmentation, CRM insights, content creation
- Agents work together to accomplish tasks
- Human > AI Agent



StratusLIVE

ARE YOU PREPARED?

TAKE THE AI QUIZ!

→ stratuslive.com/ai-preparedness-quiz/



THANK YOU

ANY QUESTIONS?

StratusLiVE

Stay In Touch

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