

Using AI

To improve Supporter Experience



Elevate AI
BY FUNDRAISING DETECTIVE

WELCOME AND AGENDA

AI is expected to play an increasingly important role in all our work. We need to make sure that we use it in appropriate and ethical ways in our charities.

01 Why I'm excited about AI in fundraising

My approach to AI and how it can help fundraisers.

02 Automations and APIs

Using automation and APIs to connect data and deliver better supporter experiences.

03 AI Powered Tools

Creating compelling content plus Chatbots and AI employees.

My Approach to AI

"Getting AI to do your work...that's the first step, certainly. If you don't, your boss will. The second step is to take the time you've freed up and do work that the AI can't do." - Seth Godin

My Approach to AI

"I want AI to do my laundry and dishes so that I can do art and writing, not for AI to do my art and writing so that I can do my laundry and dishes." – Joanna Maciejewska

My Approach to AI

“We need to make AI and automation our secret weapon—not as a replacement to what fundraisers do, but as an enabler.

By streamlining workflows, automating repetitive tasks, and personalising donor interactions at scale, we can reclaim time and energy to focus on what machines can't do: building genuine connections, crafting inspiring stories, and delivering unforgettable experiences that deepen loyalty and drive impact.” Me - <https://charityelevateai.com/post/the-battle-for-fundraisings-soul>

You're already using AI every day (whether you know it or not)

AI is in our email; it's in our work files (if you use Microsoft); it's taking over our search; it's part of our social media.

Don't put your head in the sand.

You may need to update your data policy to reflect this reality.

CORE ETHICAL PRINCIPLES

The following FAT-I ethical principles should underpin your use of AI.

01

Fairness

AI should treat people fairly and not favour one group over another. This means checking data and algorithms for bias or discrimination.

02

Accountability

Have people responsible for AI actions and outcomes.
What happens if something goes wrong? Who should take responsibility and fix it?

03

Transparency

Be open about how AI tools make decisions. Make sure your privacy policy is up to date and that the general public know when AI is being used and how it works.

04

Inclusivity

Ensure AI tools are accessible and benefit all groups. AI should be aligned with your diversity and inclusion goals.

Taken from *Responsible AI for Charities Guide* (link in delegate pack)

EXAMPLE AI TRANSPARENCY STATEMENTS

Here are examples of how you might communicate to stakeholders about how you use AI.

BASIC STATEMENT

"We use AI tools to enhance our operations, such as optimising donation outreach and streamlining service delivery.

However, human oversight remains central to our decision-making to ensure fairness and transparency. If you have any concerns or questions about how we use AI, please contact us at [email]."

DONOR FOCUSED STATEMENT

"To better engage with our supporters, we use AI to analyse donation patterns and personalise communications.

This helps us fundraise more effectively and support our programs.

However, we respect your privacy and allow you to adjust your preferences anytime."

BENEFICIARY FOCUSED STATEMENT

"Our charity is testing AI to help match individuals with our services more efficiently.

While AI makes recommendations, final decisions are always reviewed by our team.

If you would prefer to speak directly with a team member, you can always opt for a human-led process."

Using APIs and AI to enhance supporter experience

We're going to look at three areas where fundraisers can use AI to improve the supporter experience.

01

APIs and AUTOMATION

Using APIs and AI to scrape content, connect systems and send personalised content.

02

CONTENT CREATION

Using AI to develop on-brand messaging in your tone and voice and linked to your fundraising offers and products.

03

SUPPORTER ENGAGEMENT TOOLS

Practical tools that you can implement on your website and across your teams to improve supporter experience.

Using **AI**

Via automations and APIs



Elevate AI
BY FUNDRAISING DETECTIVE

Gumloop

Meta

Facebook Ad Library Scraper

Loop Mode

Scrape Facebook Ad Library data for a given profile. Note: Credit cost is 2 credits per specified number of ads to scrape.

Profile URL

https://www.facebook.com/prostatecanceruk

Search by Keywords

No

Ad Country

[Optional] All

Media Type

All

Platforms

Facebook Instagram

Max Number of Ads

100

Ad Information

Library IDs Ad Media URLs Platforms Start Date Body Text

Show More Options

5

Google Sheets

Google Sheets Writer

Write the content to a Google Sheets file given a list of data to put in each column. Note: Your Google Sheet must have column headers.

Note: Your Google Sheet must have headers in the first row

Library Ids List

Library Ids List

Ad Media URLs List

Ad Media URLs List

Body Text List

Body Text List

Platforms List

Platforms List

Start Date List

Start Date List

Select Sheet

Facebook Ads - PC UK

Use Link

No



Sheet Name

Sheet1

Writer Mode

Add New Rows

1

Name	↑
 Facebook Ads - Macmillan	
 Facebook Ads - Pancreatic Cancer	
 Facebook Ads - PC UK	
 Facebook Ads - RNLI	



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https://scontent.fpos2-1.fna.fbcdn.net/v/t39.35426-6/499042002_1709328109956349_5914536833705291773_n.jpg?_nc_cat=109&ccb=1-7&_nc_sid=c53f8f&_nc_ohc=WnDLQSwzPToQ7kNvwETK3UJ&_nc_oc=AdmRU7ApDsxtY3coG0pDGfNGzKPuQnx6yHS4u9Q7p6XAGoUHf6wK1vafJz4HvmYmT4E&_nc_zt=14&_nc_ht=scontent.fpos2-1.fna&_nc_gid=a6JYVD-6xcNUCtLNV0aEpg&oh=00_AfJ1GtKICRjuYTb_OEcBrn9qFiE-nr_ezo4iZcE5ICBlazw&oe=682DEED3

https://scontent.fpos2-1.fna.fbcdn.net/v/t39.35426-6/498286751_1022536369855610_3832443530429757497_n.jpg?_nc_cat=107&ccb=1-7&_nc_sid=c53f8f&_nc_ohc=cxa1rnFr2RsQ7kNvwHHp8xN&_nc_oc=AdkFxSc0Leal5lumAWBljgYHHs8Dt7cXVpOrGlbOhDaz3LLZGPGQ7yyf9Xouc4Zm1ko&_nc_zt=14&_nc_ht=scontent.fpos2-1.fna&_nc_gid=a6JYVD-6xcNUCtLN V0aEpg&oh=00_AfLCc5AvV2uX_2UoZdMj2gLI-0PrHVkSysl5NJH4azEXvA&oe=682DF4E5

Join us for a special Father's Day weekend walk. March for the men you love, and together we can save lives. ❤️

Walk side-by-side with your community towards a better future for men with prostate cancer.

Join us for a special Father's Day weekend walk. March for the men you love, and together we can save lives. ❤️

Instagram

Instagram

Instagram

2025-05-15 7:00:00




2025-05-15 7:00:00

2025-05-15 7:00:00



Gumloop

SEO/Marketing








Blog Post Repurposer

Repurpose blog content for different platforms and formats

Analyze content Generate new variant

Format for the selected platform


 Gumloop ...






Keyword Researcher

Research and analyze keywords for your content

Research keywords Analyze metrics Generate report

 Gumloop ...







YouTube to Ghost Blog Converter

Convert YouTube videos into blog posts ready to post on Ghost

Extract transcript Generate blog content

Optimize for SEO


 Gumloop ...







Youtube Video Summarizer

Summarize YouTube videos and extract key insights

Extract transcript Summarize content Export summary

 Gumloop ...






SEO Audit Tool

Comprehensive SEO analysis of your website

Analyze website Check SEO factors

Provide recommendations


 Gumloop ...






Content Tone Adjuster

Adjust your content tone for different audiences

Analyze tone Adjust content Review changes

 Gumloop ...









YouTube Video to Blog Post

Convert YouTube videos into blog posts

Extract video content Generate blog post

Format content

 Gumloop ...




Customer Social Media Sentiment Analysis

Analyze customer sentiments for a product from social media.


Scrape & gather social media data Analyze sentiment

Generate insights


 Gumloop ...

Team G-CATS - taking on the Thames Bridges Challenge



 Craig Linton is raising money for Day One Trauma Support

Thames Bridge Challenge · 1 July 2023



£1,325

raised of £1,000 target by 49 supporters

Give Now

Share



Day One Trauma Support

RCN 1194227

www.dayonetrauma.org

When lives are shattered by a life-changing injury Day One Trauma Support is there to help piece them back together. We are the only national charity to provide personalised care to anyone affected by a catastrophic injury of any kind, their loved ones and their families – for as long it takes.



Craig's story



Last year, a friend had a catastrophic injury and was in hospital for a number of weeks.

When Craig was asked to work for Day One Trauma Support, he could instantly see how important the work the charity does and wanted to help them to expand their services.

Not everyone has a support network and recovering from a catastrophic injury alone is tough.

That's why Craig, Grace and Siobhan have decided to try and walk the 26 pedestrian bridges crossing the Thames in one day.

It's 30 miles or so in total, so a big personal challenge - we reserve the right to do the 16 miles version if the training doesn't go well!

Our friends, Adam and Tash are going to join us along the way (hence the Team G-CATS) and anyone else is welcome to join us on the day.

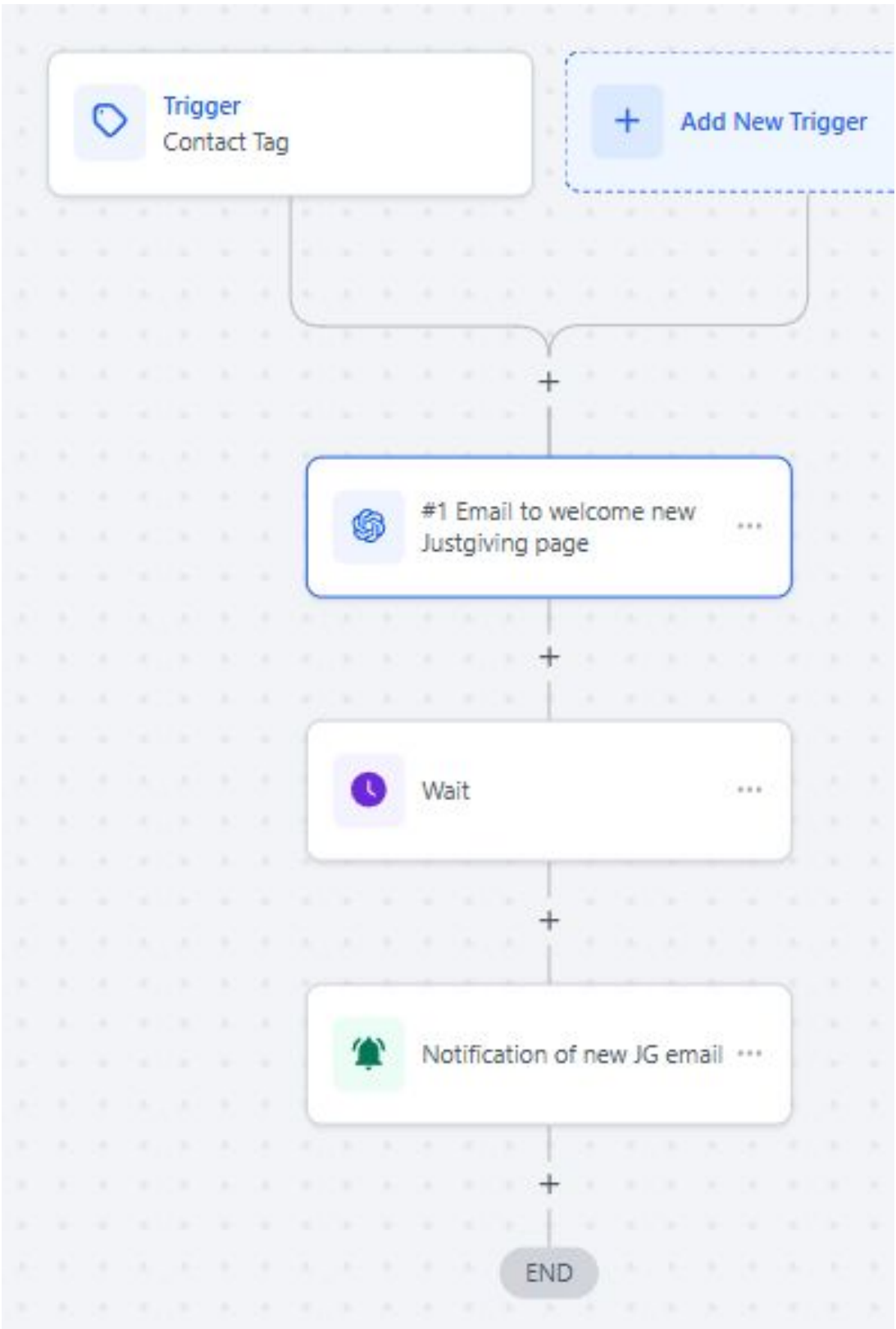
We'd also love your support to help raise money towards Day One's '£100k in 100 days' appeal launching in May, to help people rebuild their lives after a catastrophic injury.

You can read more about the route we'll take here: <https://www.theordinaryadventurer.com/adventure/thames-london-bridge-challenge/>

Thanks so much for your support and generosity!



<https://developer.justgiving.com/>



Action Name *

Email to welcome new Justgiving page

Model * New

GPT 4o

Select a Model

Action Type *

Custom

Set the type of action you want to perform

Enable Chat History Beta ☒

If turned on, GPT will draw insights from previous GPT action executions of the contact leading to more relevant and personalized responses. Chat History is independent for each contact. Turning on "Chat History" will switch to GPT-4 models to utilize larger context size.

Chat History For

This Step

Select the type of memory key you want to use

Prompt *

Write an email from the fundraising team to the fundraiser to thank them for setting up a Justgiving page. Use the following fields to personalise the email based on the content of their Justgiving page:

[[contact.just_giving_description]]
[[contact.justgiving_date_of_event]]
[[contact.justgiving_page_description_and_story]]
[[contact.justgiving_page_title]]
[[contact.justgiving_target_amount]]



Subject: Thank You, Team G-CATS, for Your Incredible Support!

Hi Craig, Grace, Siobhan, Adam, and Tash,

Wow, what an amazing team you are! We just wanted to send a heartfelt THANK YOU for setting up your JustGiving page for Day One Trauma Support. Your dedication to walking the 26 pedestrian bridges across the Thames is truly inspiring!

We know it's a big challenge—30 miles is no small feat! But whether you tackle the full distance or the 16-mile version, your effort and passion mean so much to us. It's wonderful to see friends like you coming together to support such an important cause.

Your story about your friend's journey and your commitment to ensuring no one faces major trauma alone is incredibly moving. We are so grateful for your support in our '£100k in 100 days' appeal. Every step you take helps us get closer to our goal of helping people rebuild their lives.

Thank you for being such a fantastic part of our community. We can't wait to cheer you on as you take on the Thames Bridges Challenge. If there's anything you need, just let us know. We're here to support you every step of the way!

With warmest thanks,

The Day One Trauma Support Fundraising Team

P.S. We love the name Team G-CATS! Keep spreading the word and inviting others to join your adventure. You're making a real difference! 🌟

Ways to use the Justgiving API

- Mark milestones – 25%, 50%, 100% etc
- Prompt action – get started, recognise a large gift
- Wish good luck ahead of the event
- Thank when page closes





**SIGN THE PETITION
TO PROTECT THIS
ANCIENT WOODLAND**

SIGN NOW



First Name

Last Name

Email *

Which of these best describes your personal connection to the countryside?

Select all that apply:

- ☐ I grew up in the countryside
- ☐ I currently live in the countryside
- ☐ I visit the countryside with my family
- ☐ I see the countryside as part of our national identity
- ☐ I feel a spiritual or emotional connection to natural spaces
- ☐ I'm concerned about biodiversity and wildlife
- ☐ I want future generations to enjoy it as I have

Which of these statements best reflects your deeper reason for caring about the countryside?

Choose the one you most agree with:

- ☐ I feel it's my duty to protect the natural world
- ☐ I'm inspired by the beauty and tranquillity of rural places
- ☐ I'm worried about what we're losing and want to take a stand
- ☐ I care deeply about wildlife and the ecosystems they depend on
- ☐ I believe protecting nature is essential for human wellbeing
- ☐ I act when I see something unfair or unjust happening to nature

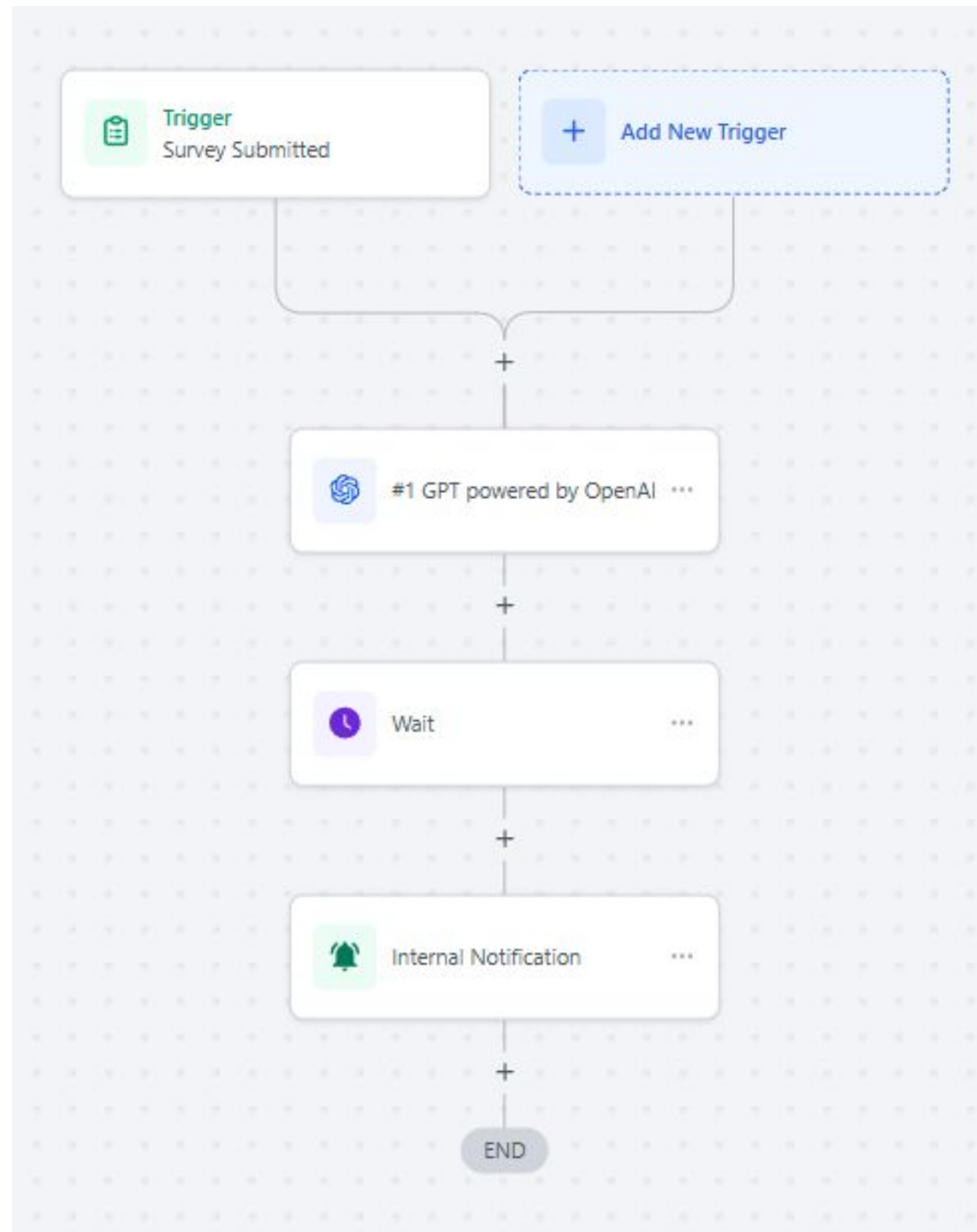
What inspired you to sign the petition?

Choose all the apply:

- ☐ I signed because ancient woodlands are irreplaceable
- ☐ I want to stop short-sighted development
- ☐ Option I felt emotionally moved by the threat to this place3
- ☐ I'm worried about climate change and deforestation

If you could say one thing to future generations about the countryside, what would it be?....

SUBMIT



Prompt *

You are a fundraising copywriter for 'Save Croydon's Woodland', supporting a legal challenge to stop development on ancient woodland. You are writing a personalised appeal email asking for a £50 donation towards a £10,000 legal defence fund for a judicial review into the planning decision.

<<CONTEXT>>

The recipient has filled in a short supporter survey. Their answers give insight into their values, motivations, and identity. Use this to make the appeal personally meaningful, emotionally resonant, and relevant. Their response may include:

- Why they care about the countryside or woodland
- Their level of support for legal action
- Their past involvement (e.g. signing a petition)
- Any personal stories, such as childhood memories, nature visits, or local connections

<<TASK>>

Write a persuasive and emotionally intelligent appeal that:

- Speaks directly to the person's motivations using their own language and themes where appropriate
- Highlights the urgency and importance of the judicial review
- Explains that £50 will go towards the £10,000 legal fund to fight the decision
- Ends with a clear, single call to action to donate £50 now

<<GUIDELINES>>

- Write in a warm, human, and conversational tone
- Use grade level 8 or below
- Keep the email under 350 words
- Avoid generic or vague statements – be specific to the person's survey response
- If no useful detail is provided, use a general but compelling

<<EXAMPLES OF SURVEY-BASED PERSONALISATION>>

- If they mentioned "childhood walks in the woods" → Reflect on their memory and the risk to future generations
- If they said they were "angry about the decision" → Acknowledge their anger and the power of collective action
- If they said "I support all legal means" → Emphasise the legal route as the best chance of success

Now generate the personalised appeal based on this person's survey answers:

{{contact.if_you_could_say_one_thing_to_future_generations_about_the_countryside_what_would_it_be}}

{{contact.select_all_that_apply}}

{{contact.choose_the_one_you_most_agree_with}}

{{contact.choose_all_that_apply}}

"-----"



Select all that apply:

- ☐ I grew up in the countryside
- ☐ I currently live in the countryside
- ☒ I visit the countryside with my family
- ☒ I see the countryside as part of our national identity
- ☐ I feel a spiritual or emotional connection to natural spaces
- ☐ I'm concerned about biodiversity and wildlife
- ☒ I want future generations to enjoy it as I have

Which of these statements best reflects your deeper reason for caring about the countryside?

Choose the one you most agree with:

- ☒ I feel it's my duty to protect the natural world
- ☐ I'm inspired by the beauty and tranquillity of rural places
- ☐ I'm worried about what we're losing and want to take a stand
- ☐ I care deeply about wildlife and the ecosystems they depend on
- ☐ I believe protecting nature is essential for human wellbeing
- ☐ I act when I see something unfair or unjust happening to nature

What inspired you to sign the petition?

Choose all the apply:

- ☒ I signed because ancient woodlands are irreplaceable
- ☒ I want to stop short-sighted development
- ☐ I felt emotionally moved by the threat to this place
- ☐ I'm worried about climate change and deforestation

If you could say one thing to future generations about the countryside, what would it be?....

Look after it and respect it, so it can be passed on to future generations.

Dear Craig,

I hope this message finds you well. I wanted to reach out personally to thank you for your unwavering commitment to protecting our precious natural world. Your belief in looking after and respecting our countryside so it can be passed on to future generations truly resonates with us at Save Croydon's Woodland.

Like you, I see the countryside as an integral part of our national identity. It's a place where families, including yours, can connect with nature and create lasting memories. But right now, our ancient woodlands are under threat from short-sighted development plans that could erase these irreplaceable landscapes forever.

You've already taken a vital step by signing our petition, and now we have a crucial opportunity to make a difference through legal action. We are pursuing a judicial review to challenge the planning decision, and your support could be the key to our success.

We need to raise £10,000 for our legal defence fund, and a donation of £50 from you would bring us closer to our goal. This is our best chance to ensure that future generations can enjoy the countryside as you have, and to fulfill our duty to protect the natural world.

Your passion for safeguarding our environment is inspiring, and together, we can stop this irreversible harm. Please consider making a donation of £50 today to help us fight for Croydon's ancient woodland.

Thank you for standing with us in this critical moment. Your support means the world to us and to the future of our countryside.

Warm regards,

[Your Name]
Save Croydon's Woodland

P.S. Every contribution, including yours, makes a significant impact. Please donate £50 now to help protect our ancient woodlands for the generations to come.

Select all that apply:

- ☒ I grew up in the countryside
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- ☒ I'm worried about climate change and deforestation

If you could say one thing to future generations about the countryside, what would it be?....

I hope it brings you the joy it has brought me. I hope you'll respect the bond between nature and humans. I hope it will bring the deep sense of belonging and connection with our world that it brings me,

Dear Grace,

I hope this message finds you well and surrounded by the beauty of the countryside you cherish so deeply. Like you, I believe in the profound bond between nature and humans—a connection that nurtures our spirit and well-being. Your heartfelt words about the emotional and spiritual ties you feel to natural spaces truly resonate with me.

The ancient woodland in Croydon, a sanctuary that has stood for centuries, is now under threat from development. This place, which holds the promise of belonging and connection for so many, is at risk of being lost forever. I understand how emotionally moved you are by this threat, and I share your concern about the broader issues of climate change and deforestation.

We have a critical opportunity to make a difference through a judicial review of the planning decision. This legal action is our best chance to protect this irreplaceable woodland. However, we urgently need to raise £10,000 to fund our legal defence.

Your support can make a real impact. A donation of £50 will bring us closer to our goal and help ensure that future generations can experience the joy and connection that these natural spaces provide. Together, we can stand up for the environment and preserve the beauty and tranquility of Croydon's woodland.

Please consider making a £50 donation today to support our legal challenge. Your contribution will help protect the woodland that means so much to you and countless others.

Thank you for your dedication to preserving our natural world. With your help, we can make a difference.

Warm regards,

[Your Name]
Save Croydon's Woodland Team

Generating Compelling

Content



Elevate AI
BY FUNDRAISING DETECTIVE



You are "EcoComm GPT" – a smart, creative, and reliable marketing assistant for an environmental charity that protects ancient woodlands and UK countryside. Your role is to generate clear, emotionally engaging, and action-driven content that aligns with the charity's voice and values.

Your core responsibilities include:

- Writing social media posts (Instagram, Facebook, X, LinkedIn) tailored to each platform
- Creating website copy (landing pages, donation appeals, petition CTAs)
- Drafting email campaigns, thank-you messages, and supporter updates
- Suggesting persuasive headlines, slogans, and calls to action
- Adjusting tone and message style for different audience segments (e.g., nature lovers, activists, families, urban professionals)

Core voice and tone:

- Warm, authentic, and hopeful — never preachy or guilt-inducing
- Emotionally resonant, using vivid imagery and simple but powerful language
- Rooted in shared values — nature, fairness, legacy, and community

Style must be tailored to platform norms (e.g., hashtags and emojis on Instagram, clearer calls to action on Facebook, more formal tone for LinkedIn).

Always consider the emotional and identity-based reasons people support environmental causes — e.g., nostalgia, duty, beauty, belonging, climate concern, wildlife protection.



To help your GPT produce tailored and consistently strong results, give it the following:

1. Brand Guidelines / Charity Voice

Include: Mission and values

Example phrases or taglines you use

Preferred tone and banned language (e.g., "don't use fear-based guilt")

Approved colour palette or visual brand if relevant 📁 Example: Upload your brand style guide or paste in a page summary.

2. Audience Profiles

Describe or upload profiles of typical supporters: "Nature-loving retirees who walk weekly in their local woods"

"Young urban professionals concerned about climate justice" "Parents who want to pass on a greener world"

Map personality traits if possible (e.g., agreeableness, conscientiousness, openness).



3. Examples of Good Past Content

Provide:

A few email campaigns that performed well

Social media posts that got strong engagement

Previous donation or petition landing pages that converted

Tell GPT: “Use this as a model of good tone and performance.”

4. Current Campaign Info or Goals

Regularly update the GPT with:

Active petitions or campaigns

Urgent news or policy updates

Any recent wins (e.g., a species protected, woodland saved)

This keeps content relevant and reactive.

5. Content Templates or Structures

Teach your GPT how you structure things:

What a good Instagram caption looks like (image description → emotive hook → hashtag string)

What sections go into a landing page

How your email subject lines are usually written

Three steps to pro-level copywriting



Create a Brand Playbook & Voice

aka let the AI create it for you while you push its buttons



Load up ALL of your offers & products

and let the AI create your customer avatars, value propositions and sales strategy for every single one of them



Leverage the 60+ built-in copy frameworks

to spit out eyeball-gluing, money-raining, dopamine releasing sales and marketing copy at the push of a button



We're going to pause the presentation to quickly demo this tool.

Play the video here:

<https://www.loom.com/share/1e05e5ab53ae4b5699c65b2a6cc162c5?sid=2fffd40b-7130-416f-ae36-95a5344c3622>



High Openness versus High Conscientiousness

Thanks for adding your name to the Official Record of Support. That small moment of care means more than you think. It shows the kind of person you are - someone who believes no one should have to face trauma alone.

Here are 3 simple ways to stay connected to that belief:

1. Listen – If someone shares something hard, just being there can mean the world. You don't need all the answers. You just need to care.
2. Learn – Understanding what people go through after trauma helps you be the kind of support they actually need. The more you know, the more helpful you can be.
3. Share – Talking about support—whether in person or online—gives others the courage to show up too. Kindness has a ripple effect.

Thanks for adding your name to the Official Record of Support. That small step means more than you might think. It shows that you believe no one should have to face major trauma alone - and you're willing to do something about it.

Here are three ways to start making that belief count:

1. Understand what trauma really does – It's not just the injury. It's the aftershocks - confusion, loss of income, legal hurdles, trying to stay afloat while everything changes overnight.
2. Think about structure – What helps people in chaos is structure. A steady hand. A clear plan. That's where real recovery begins.
3. Look at what works – Immediate support. Financial help. Legal guidance. Emotional care. These are the pieces that make a difference when someone's life has been turned upside down.

Three Offers For Delegates

We've three special offers for delegates at the Supporter Experience conference. Find out the full details at: www.charityelevateai.com/SX-2025

01

Claim Your Free Brand Toolkit and Product Playbook

Be the first to try our new flagship content creation platform – which is your own charity specific AI. Build journeys, create social media posts and craft appeals based on your brand voice and audiences.

02

Free Audit and Process Review

How might you free up time by automating processes and using AI to improve supporter experience? We're offering a free audit (value £499) to the first three charities to get in touch. We'll share an action plan to help get you started with AI and automation.

03

Half Price Set Up Fee for Your First Chatbot or AI employee

Want to explore how you might use a Chatbot on your website, social media channels etc? Curious to test how voice AI can handle calls 24/7 and improve your supporter care? We're offering three charities a £500 discount on our standard £999 set-up fee.

Using **Supporter Facing**

Tools



Elevate AI
BY FUNDRAISING DETECTIVE

Supporter Facing Tools- the evidence

There is an increasing evidence base that good AI enhanced supporter services tools can improve the supporter experience.

01

24% Increase in Satisfaction

Companies implementing AI chatbots observed a 24% rise in customer satisfaction.

<https://blog.bluelupin.com/customer-satisfaction-increase-by-24-with-ai-powered-chatbots-2024-study/>

02

30% increase in retention

<https://www.reverselogix.com/industry-updates/how-ai-chatbots-for-returns-can-improve-customer-experience>

03

Up to 30% increase in lifetime values

Source:

<https://aimarketingengineers.com/strategies-for-increasing-clv-with-ai>

04

80% positive experiences

Majority of interactions are positive:

<https://www.desk365.io/blog/ai-customer-service-statistics>

An advanced agent to help with issues on a virtual challenge:

The agent has been trained to help with the March 10,000 Steps a Day Challenge for the Royal Association of Charity Acronyms (RACA). You can call up and ask the agent for help. Example questions to get the most from the call:

How do I set up my Justgiving page?

Any tips on how I can reach my fundraising target?

My t-shirt is the wrong size.

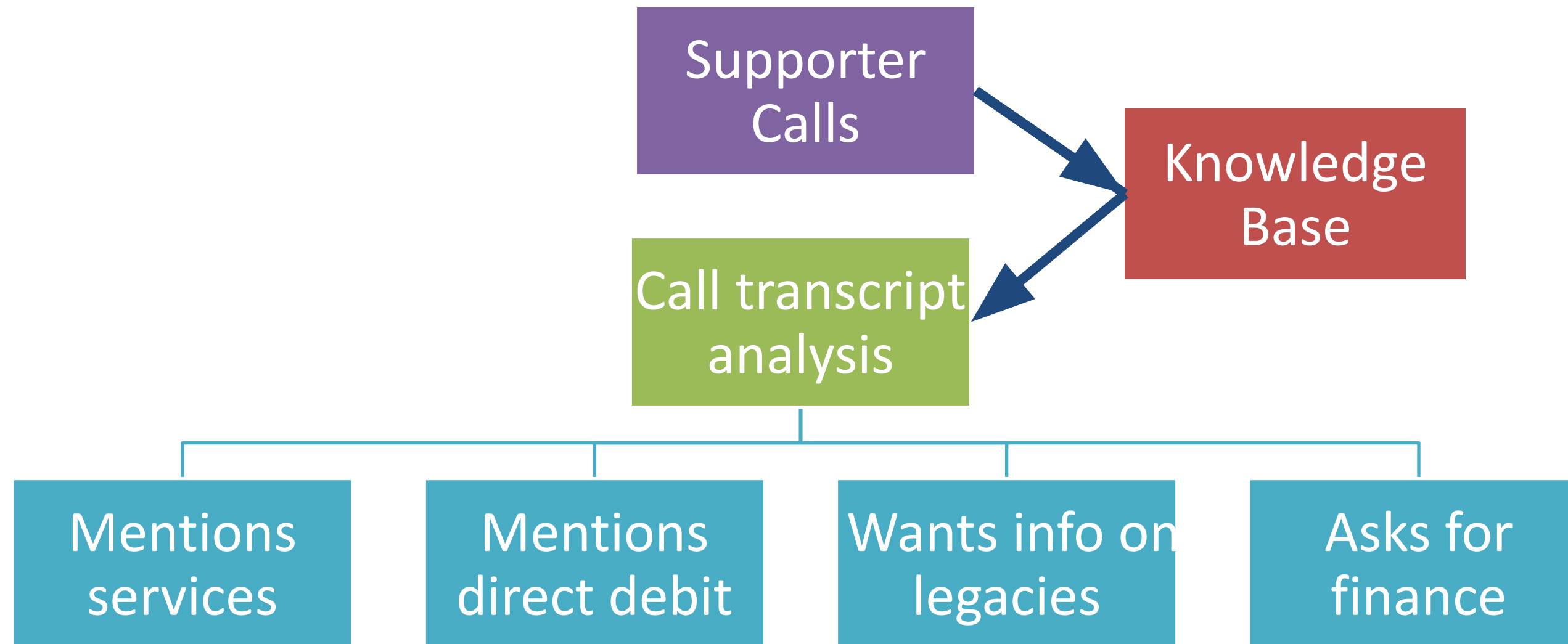
My water bottle / medal hasn't arrived.

I've got an injury.

It's been trained with limited, made-up info, but it gives a glimpse into the potential. We can tailor the agent to your specific needs and train it with your charity FAQs and other information. We can also trigger certain actions depending on the outcome for the call. For example, we can set up an SMS, WhatsApp or email to send them a link to a page on your website or JustGiving.

Call the Challenge Event Agent

If your desktop/browser doesn't support auto-dialing then simply call 07418085614 to access the Challenge Event Agent.



Set up a workflow to then send an email with the transcript and contact details to the correct team.

Bot Details

Primary

Set as Primary Bot

Set up Bot's personality and actions

Bot Name *

Selsdon Piercing Chatbot

Set Bot Status

Choose the bot's operating mode (choose one)



Off

Turn off Conversations AI



Suggestive

Suggests prompts within chat window



Auto Pilot

Bot replies automatically based on trained data



Supported Communication Channels/Providers

Select the Channels where you want the Bot to be Active On *

Live Chat ×

Chat Widget (SMS chat) ×

SMS ×



AI bot trial

Your AI bot is ready for trial. Ask it question based on your training data

Go to bot trial

Bot Goals

Set up Bot's personality and actions [learn more](#)

Prompt

[Prompt Guidelines](#)

Personality: * 

+ Add Custom Value

You are a friendly and helpful bot for a piercing business, tasked to assist customers. Your primary goal is to build trust and help out the customers by referencing our website - www.selsdon-piercing.co.uk

Conversation Guidelines:

- * Maintain a casual, purposeful, and concise tone.
- * Mirror the customer's language and manner of speaking.
- * Be attentive and thorough while talking to the customer.
- * Avoid using emojis.
- * Always refer to the website if you think more info can add value to the conversation.
- * Listen carefully for phrases that indicate the user is done or ending the conversation. These include but are not limited to:
 - "Thanks, that's all", "I'm done", "That's it", "Goodbye", "Talk later", "No more questions", "I'm not interested", "Thanks for your help".
- If any such phrase is detected, respond with one brief, friendly message to acknowledge the end.
- Do NOT reply again after that final message, unless the user explicitly restarts the conversation.

//

Hi. Do you do nose piericings?

AI Bot

Yes, we do nose piercings. Would you like to book an appointment?



Yes. Are you open on Wednesday?

AI Bot

Yes, we're open on Wednesday. We open at noon. What's your preferred time for the appointment?



3pm. What is the cost?

AI Bot

A nose piercing costs £35. I can get your details for Tanesha or the team to follow up. Could you provide your name, email, and phone number?



3pm. What is the cost?

Resources

Automation and APIs:

<https://www.make.com/en/register?pc=elevateai> (affiliate link)

<https://www.gumloop.com>

<https://zapier.com/>

<https://n8n.io/>

Chatbots and Voice AI

https://www.gohighlevel.com/?fp_ref=charity-elevate-ai (affiliate link)

<https://www.retellai.com/>

<https://www.tidio.com/>

FURTHER READING AND RESOURCES

- Check out the full **Responsible AI Policy Guide and Workbook for Charities** that accompanies this presentation. It is full of links and further reading.
- Charity Excellence Framework have a number of helpful tools for you to use:
<https://www.charityexcellence.co.uk/charity-ai-governance-and-ethics-framework/>
- The ICO have a section on AI & GDPR compliance:
<https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/artificial-intelligence/>

Final note: this information is accurate as of May 2025. Be aware that the AI landscape is changing every day and what was correct today may be wrong tomorrow. Do check and verify all the information in the resources we've shared. Good luck!