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# The Charity Guide to Agentic AI

From an overstretched supporter desk to a digital worker that answers every call, captures every gift, signs up every volunteer, and knows exactly where the line of care sits.

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## — FOREWORD

# More need, fewer givers, a ringing phone.

**A**ustralia's charities have rarely been busier. In the most recent year measured, the sector's revenue reached a record \$222 billion, a rise of almost eleven per cent, as demand for services kept climbing.<sup>1</sup> Yet the base that pays for that work is thinning. The number of Australians claiming a donation has fallen by around 270,000 over the past decade, to roughly 4.3 million, fewer than three taxpayers in ten.<sup>2</sup> Volunteering, the sector's other lifeblood, sat at about 28 per cent of adults in late 2024, well down on its pre-pandemic mark.<sup>3</sup>

Behind almost every gift, every volunteer who signs up, and every person who rings for help is a phone call or an online form that someone has to answer. In most not-for-profit (NFP) organisations, the people who answer are a small supporter-care or fundraising team, stretched a little thinner each year. Calls ring out during an appeal. A would-be monthly donor gives up on hold. A volunteer offer is never returned. A regular giver's card quietly declines and nobody calls to save it. None of it appears on a report, which is exactly why it goes unaddressed for years.

This guide is about a practical answer to that problem: an agentic artificial intelligence (AI) voice agent that works the phones and the routine administration around fundraising, volunteering and supporter care, so your people can do the parts of the work that genuinely need a human. It is written for the managers, fundraisers and operations leads who keep charities running, and who want to understand what this technology does, what it must never do, and how to put it to work without straining a supporter's trust or breaching the rules that govern giving and personal information in this country.

We have tried to be honest throughout. There is a line this guide keeps returning to, the line between handling an enquiry and stepping into care, counsel or pressure that belongs to a person, and a good deal of what follows is spent making sure the technology stays firmly on the right side of it.

## **Brad Riley**

CEO, Agntic.ai

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1. Australian Charities and Not-for-profits Commission (ACNC), Australian Charities Report, 11th edition (2025), drawing on Annual Information Statements for the year to 30 June 2024. 2. KPMG analysis of Australian Taxation Office Taxation Statistics (2021–22 income year), December 2024. 3. Volunteering Australia, Key Volunteering Statistics 2024 Update, citing Australian Bureau of Statistics (ABS) data.

## — WHAT IS INSIDE

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# Agentic AI, in plain language

Before the benefits, the basics. What a digital worker is, why it is different from the chatbots you have already met, and the single boundary that makes it safe to put in front of your supporters.



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**THE IDEA**

## A worker, not a chatbot.

You have used generative AI already. You type a question, it writes you an answer, and the conversation ends there. It is a clever tool, but it waits for you and does nothing on its own.

Agentic AI is the next step. An **agent** does not just talk. It is given a goal, a set of rules and access to the tools it needs, and it carries the task through from start to finish. For a charity, the goal is usually simple to state: answer the call, understand what the supporter needs, and complete the task, whether that is taking a gift, signing up a volunteer, or pointing a caller to the right help, the same way a capable supporter-care officer would.

That is why we call it a **digital worker** rather than a chatbot. It speaks naturally on the phone, it listens, it asks the follow-up questions your team would ask, and then it acts: it takes the donation securely, sets up the monthly gift, books the volunteer onto Saturday's shift, and sends the receipt. When something falls outside its rules, it hands over to a human.

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## A chatbot answers. A digital worker finishes the job, then knows when to step back.

The difference matters most at the moments charities cannot staff: the night an appeal airs, the lunchtime rush, the weekend event. A web chatbot might capture a message. A digital worker actually picks up the phone at 7am, at lunchtime and at 9pm, holds a real conversation, and leaves a confirmed gift or a rostered volunteer in your system by morning.

None of this replaces your team. It removes the repetitive, interruptive work that stops your people from doing the parts of the job that genuinely need a person: the major-donor relationship, the distressed caller, the complex or the sensitive.

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**THE ONE RULE**

## What it must never do.

A digital worker in a charity is built around a boundary that matters more here than in almost any other business. It handles the administration around giving, volunteering and supporter care. It does not, under any circumstances, step into the role of a counsellor, an adviser, or a fundraiser who leans on people for money.

That means it does not counsel a person in distress, it does not assess how urgent someone's situation is, it does not give welfare, financial or clinical advice, and it never pressures, guilts or talks a supporter past a clear "no". If a caller is upset or in danger, the agent's job is not to manage the crisis. Its job is to recognise the situation, respond with care, and direct the caller to the right human help straight away.

**THE LINE, IN ONE SENTENCE**

**The agent handles enquiries, gifts and bookings. Care, counsel and any judgement about a person's wellbeing always belong to a human.** If a caller may be in distress or danger, the agent is built to say so plainly and direct them to Lifeline (13 11 14), triple zero (000) or the right service, and to escalate to your team. It never tries to handle the crisis itself.

This is not a limitation we apologise for. It is the design. A charity that adopts this technology should be able to say, hand on heart, that no supporter was ever counselled, pressured or assessed by a machine. Everything in the rest of this guide is built on top of that promise, and Section Five sets out exactly how it is enforced.

# A day in supporter care

The cost of an overloaded supporter desk does not appear on any report. It shows up as a tired team, a missed appeal night and a donor who quietly lapsed. Here is the day as your team actually lives it.



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**RACHEL'S TUESDAY · A MID-SIZED COMMUNITY CHARITY**

# Three lines, two hands, one appeal still running.

Rachel runs supporter care at a community charity. Nothing here is unusual. That is the point.

**MORNING**

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**8:05**      **Doors open, phones already lit.** An appeal aired last night and the line has been ringing since before open. Rachel answers what she can while logging yesterday's gifts.

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**8:40**      **Two callers give up on hold. One was setting up a monthly gift. One was offering to volunteer at Saturday's event. Neither leaves a message.**

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**10:20**      **A hard call.** A distressed caller needs help the charity does not directly provide. Rachel stays with them, gently, and finds the right service. It is the most important call of the day, and it takes twenty minutes.

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**12:30**      **Lunch.** The desk is covered by one person. Fourteen calls come in over the hour, several responding to the appeal. Five are answered.

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**AFTERNOON**

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**2:00**      **Lapsed givers.** Rachel meant to phone the regular donors whose cards declined this month. She has not had a clear ten minutes. The list rolls to next week, again.

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**4:30**      Saturday's volunteer roster still has gaps. The confirmation calls did not get made.

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**6:10**      **Phones to message bank.** From now until 8am, every caller, including every late-night appeal responder, hears a recording.

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**THE INVISIBLE COST**

## None of it was anyone's fault.

Rachel is good at her job. The charity is well run. And yet by the end of the day a handful of gifts never happened, two supporters were lost, the lapsed-giver list did not move, and Saturday's roster is still short.

This is the trap of supporter-care work. The losses are real but invisible. A missed call is not recorded as a missed gift; it is simply a call that never reached a person. A lapsed monthly donor does not announce themselves; the gift just stops. A would-be volunteer who gave up on hold looks like nothing at all, not like the help your Saturday event needed.

Because nobody can see the cost, nobody can justify hiring against it, and the team is asked to absorb a little more each year. The work that gets dropped is always the same work: the calls at the edges of the day, the appeal-night overflow, the patient follow-up. The work, in other words, that a digital worker is built to pick up.

The rest of this guide is about handing that specific layer of work to an agent, so the next Tuesday looks different: every call answered, every gift captured, every volunteer confirmed, the lapsed-giver list worked through, and Rachel free to do the human part of her job properly.

# The five jobs a digital worker does best

Not everything should be automated, and a good deal of charity work never will be. These five jobs are where an AI voice agent is genuinely strong, and where charities see the change first.



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 WHERE IT EARNS ITS PLACE

# Five jobs, done properly, every time.

## JOB 01

ANSWERED

## Answering the phone and the appeal overflow

Every call picked up on the first ring, at every hour, including the appeal-night surge, the lunchtime spike and after close. No hold queue, no message bank, no supporter lost to a recording.

## JOB 02

CAPTURED

## Taking gifts and setting up regular giving

The agent takes a one-off donation securely through your existing platform, sets up a monthly gift, and writes the supporter record into your database (customer relationship management, or CRM). It sends the receipt and the tax wording without fail.

## JOB 03

SIGNED UP

## Volunteer enquiries and shift confirmation

It welcomes would-be volunteers, captures the details you need, answers the common questions, and confirms and reminds rostered volunteers, so the event you are running is actually staffed.

## JOB 04

SAVED

## Regular-giver and lapsed-supporter follow-up

Declined cards, quiet cancellations and lapsed supporters, worked through patiently and respectfully by phone. The slow outreach that always gets dropped first, and where regular-giving income quietly leaks away.

## JOB 05

DIRECTED

## Supporter care and signposting

The agent answers the routine questions supporters actually ask, where the money goes, how to claim a tax deduction, how else to help, from your own words. And when a caller needs help your charity does not provide, it directs them, with care, to the right service. Anything that involves distress or judgement about a person's wellbeing always goes to a human.

## — WHY THESE FIVE

## Rising need, a thinner base, scarcer hands.

The squeeze on charities is not about effort. Demand is climbing while the donor base shrinks and volunteers grow harder to find. That makes every answered call, every saved regular gift and every confirmed volunteer matter more, which is exactly the work an agent does well.

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# \$222b

Charity-sector revenue in the year to June 2024, a record and up almost 11%, as demand for services kept growing.

ACNC AUSTRALIAN CHARITIES REPORT, 11TH EDITION, 2025

# 270k

fewer Australians claiming a donation than a decade earlier, leaving about 4.3 million donors, under three taxpayers in ten.

KPMG ANALYSIS OF ATO DATA, 2024

# ~28%

of adults volunteered in late 2024, down from around 36% before the pandemic, so the same work falls on fewer hands.

VOLUNTEERING AUSTRALIA / ABS, 2024

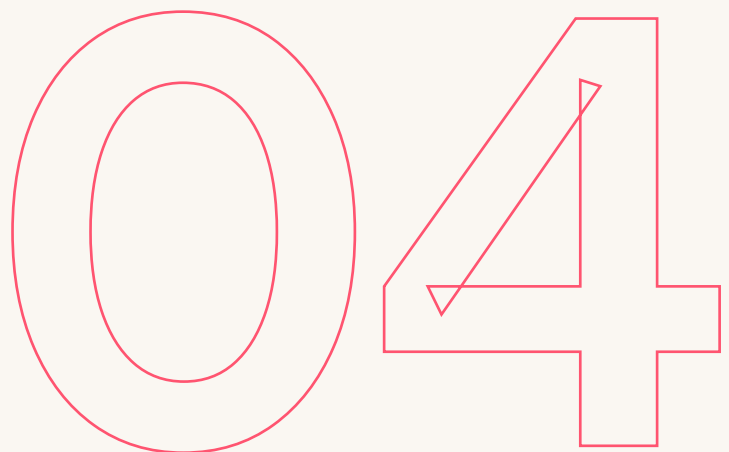
Read those numbers together and the case is straightforward. The need is not the problem. The problem is the narrow set of moments where a supporter tries to reach you and cannot, or where a regular gift lapses unnoticed and nobody calls to save it. Hand those moments to an agent and you keep the support you have already earned.

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Sources: ACNC, Australian Charities Report, 11th edition (2025), for the year to 30 June 2024. KPMG analysis of Australian Taxation Office Taxation Statistics (2021–22), December 2024. Volunteering Australia, Key Volunteering Statistics 2024 Update, citing ABS data (volunteering participation about 28% in October 2024, down from 36% in 2019).

# What a ringing-out phone really costs

A missed call feels like nothing. A handful of them, every day, across appeal nights and quiet afternoons, is a different story. Here are the four quiet leaks, and what they add up to.



## — THE LEAKS LEDGER

## Four leaks, one total.

The weekly figures below are illustrative drivers for a mid-sized community charity, not a quote. Every charity's numbers differ. The value of laying them out is that the leaks stop being invisible.

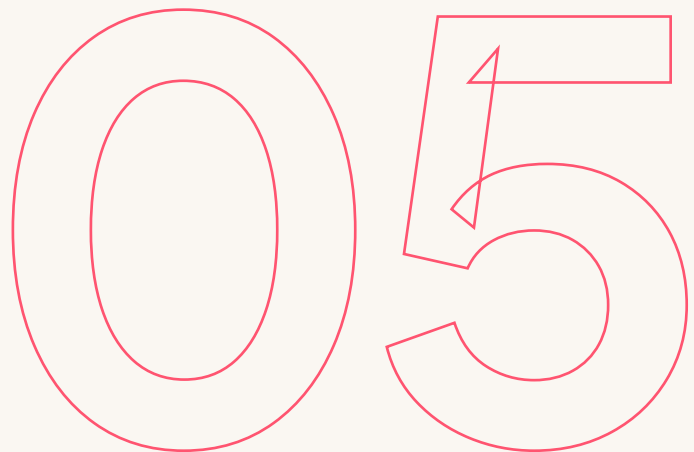
<p><b>Donation calls that ring out</b></p> <p>~14 a week unanswered at appeal peaks and across the day; about half were supporters ready to give (\$70 each).</p>	<b>\$490</b> /wk
<p><b>Supporters who give up on hold</b></p> <p>~8 a week who leave no message; about four were giving or volunteering, and simply do not call back.</p>	<b>\$280</b> /wk
<p><b>After-hours and appeal-night calls</b></p> <p>~10 a week hit a recording between close and open; the motivated give elsewhere, or not at all.</p>	<b>\$350</b> /wk
<p><b>Regular givers lost without a save-call</b></p> <p>Declined cards and quiet cancellations. A prompt, friendly call keeps a share of them, worth about \$480 a week in continuing gifts.</p>	<b>\$480</b> /wk
<p><b>The combined leak</b></p>	<b>\$1,600</b> /wk

That is roughly \$77,000 a year leaking quietly through four holes, none of which shows up on a statement. You do not need these exact numbers to act; even at half the assumptions the annual cost dwarfs the price of closing it. A digital worker addresses all four at once: it answers the calls that ring out, it removes the hold queue, it works appeal nights and after hours, and it follows up every regular giver. Section Eight builds the full model with your own numbers.

Illustrative weekly drivers for a mid-sized community charity. Gift values and call volumes vary widely; replace with your own. International fundraising evidence consistently shows first-year and regular-giver retention as the sector's hardest and most valuable problem (Fundraising Effectiveness Project, 2024).

# Trust, privacy and the line you never cross

This is the section that matters most for a charity and the one most guides skip. How a vulnerable caller is protected, how donor trust is kept, and exactly how the agent is held on the right side of the line of care.



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**SUPPORTER INFORMATION IS SPECIAL**

## Trust is the asset. Protect it.

Charities hold information most businesses never touch: a donor's giving history, a beneficiary's hardship, sometimes details about health, family or immigration status. Under the Privacy Act 1988 (Commonwealth) and the thirteen Australian Privacy Principles (APPs) that flow from it, much of this counts as **sensitive information**, which carries a higher standard of consent, handling and security than ordinary personal details.

That framework has just been strengthened. The Privacy and Other Legislation Amendment Act 2024 introduced a statutory right for individuals to sue for serious invasions of privacy, in force from June 2025, and, from 10 December 2026, a requirement to tell people in your privacy policy when decisions affecting them are made by substantially automated means.<sup>4</sup> A charity using an AI agent should plan for that disclosure now rather than scramble for it later.

Trust is also a fundraising obligation, not just a legal one. The National Fundraising Principles, agreed by the Commonwealth, states and territories and now being adopted jurisdiction by jurisdiction, set core standards of conduct: honesty, transparency, donor protection and respectful communication.<sup>5</sup> An agent that fundraises has to be built to those standards, not retrofitted to them.

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## A supporter should never have to wonder who, or what, they are talking to, or where their information goes.

So the agent tells callers plainly that they are speaking with an automated assistant. It collects information only for the purpose the supporter is contacting you about, and only with their knowledge and consent. It respects every "do not contact" and every "no". Donations are taken through your existing, secure payment platform; the agent does not become a new place where card details sit. Data stays inside boundaries you control, which for Australian charities usually means Australian data centres, encrypted in transit and at rest, with a clear record of what was collected and why.

The agent connects to your CRM and fundraising tools through controlled, permissioned access. It can see and write the things you allow it to, and nothing beyond that.

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**THE LINE OF CARE, ENFORCED**

## How the line is held.

Section One set the rule: the agent handles administration, never care, counsel or pressure. This is how that rule is enforced in the way the agent is actually built.

### THE AGENT WILL

- + Take gifts and set up regular giving against your rules

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- + Sign up, confirm and remind volunteers

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- + Answer routine questions: where money goes, tax receipts, how to help

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- + Recognise distress and direct callers to Lifeline (13 11 14), triple zero (000) or the right service, without delay

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- + Respect every "no", every do-not-contact and every consent choice

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- + Hand over to a human whenever a caller asks, or whenever the conversation leaves its rules

### THE AGENT WILL NOT

- Counsel, advise or assess a person in distress or crisis

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- Decide how urgent someone's situation is

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- Pressure, guilt or talk a supporter past a clear "no"

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- Disclose a supporter's or beneficiary's details to anyone

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- Make a judgement that belongs to a person

### HUMAN IN THE LOOP

A person is never removed from care. The agent is a layer in front of routine administration, with clear escalation paths back to your team and a standing instruction to hand over the moment a conversation needs human judgement or compassion. You set the rules; the agent keeps to them; you can see everything it did.

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**GOVERNANCE YOU CAN SHOW**

## Built to be inspected.

Charities run on accountability. Boards, members, funders and the ACNC all expect a charity to act in the interests of its purpose and its supporters, and a digital worker should add to that accountability, not subtract from it. Because every interaction is logged, you have a clearer record of supporter contact than most charities keep today, when a phone call leaves no trace at all.

That record supports the obligations you already meet: your privacy policy and consent practices, your handling of sensitive information under the APPs, the fundraising conduct expected under the National Fundraising Principles, and the duties that sit behind the ACNC Governance Standards. The agent operates inside those frameworks rather than around them.

It also makes review simple. You can listen back, read transcripts, and adjust the agent's rules in plain language. If you decide it should never discuss a particular topic, or should always escalate a particular kind of call, that change is made once and applied to every call from then on. Consistency, in other words, becomes a setting rather than a hope.

This guide is general information, not legal, privacy or professional advice. Before you go live, your own privacy obligations and fundraising requirements should be confirmed with the appropriate adviser. What the technology gives you is a supporter desk that is easier to govern, not harder.

# Under the bonnet

You do not need to be technical to use this, but it helps to know what is happening when the phone rings. Here is the whole thing, in six parts.



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**HOW IT WORKS**

# Six parts, one conversation.

**PART 01**

## It picks up and listens

The agent answers in a natural voice, on the first ring, and tells the caller they are speaking with your charity's automated assistant. It understands ordinary speech, accents and interruptions.

**PART 03**

## It takes the gift and records it

It processes a donation through your existing, secure payment platform, sets up a monthly gift, and writes the supporter record straight into your CRM, with the receipt and tax wording sent automatically.

**PART 05**

## It works after hours

Appeal nights, weekends and the lunchtime gap are covered without extra rostering. The gifts and sign-ups that greet your team in the morning are already in the system.

**PART 02**

## It follows your rules

Gift types and amounts, regular-giving setup, volunteer roles, what the charity does and does not do: it works from the rules you set, in plain language, not from guesses.

**PART 04**

## It escalates cleanly

When a call needs a person, or shows any sign of distress, it responds with care and hands over to your team or directs the caller to Lifeline (13 11 14) or triple zero (000). It never tries to manage a crisis itself.

**PART 06**

## It reports back

Every call is logged, transcribed and summarised. You see volumes, gifts, sign-ups and anything escalated, and you tune the rules from there.

# Before you switch it on

You can stand up a working agent quickly. The charities that get the most from it spend a little time first, getting the groundwork right. Here is what to map across two weeks.



## — THE GROUNDWORK

# An hour of mapping saves a month of patching.

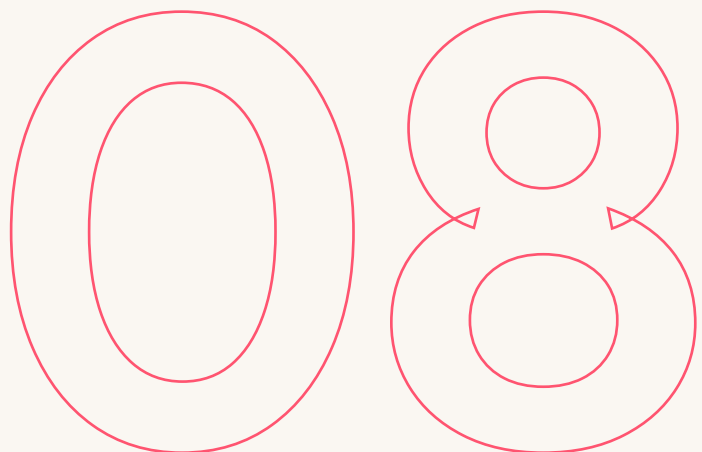
Getting an agent live is fast. The difference between a good launch and a frustrating one is whether you have written down the things your supporter-care team currently hold in their heads. Work through this list before you go live.

- Your top ten reasons supporters call, in order
- Your gift types and amounts, and how a regular gift is set up
- Your donation platform and supporter CRM, and how they connect
- Your volunteer roles, shifts and onboarding steps
- What must always go to a human: distress, complaints, media, major gifts
- Your distress and escalation words, and the services to refer to
- Your do-not-contact and consent rules
- Your receipting and deductible gift recipient (DGR) tax wording
- Your privacy and consent wording for collecting information
- Who owns the agent's rules and reviews its reports

This is a fortnight of light work, not a project. Most of it is writing down decisions you have already made informally. Once it is on paper, the agent can be configured to match exactly how your charity already runs, which is the whole point: it should sound and behave like your organisation, on its best day.

# Building the business case

An illustrative model, not a promise. Plug in your own numbers and the shape of the return tends to hold: it pays for itself on captured gifts alone, before you count the regular givers it saves or the hours it returns.



## — AN ILLUSTRATIVE MODEL

## Where the return comes from.

A worked example to show the mechanism, not a quote. The numbers are illustrative and rounded; replace them with your own. The point is that the three returns stack, and the first one usually covers the cost by itself.

### THE SCENARIO · A MID-SIZED COMMUNITY CHARITY

Takes roughly 180 calls a week and misses about 25, mostly at appeal peaks and after hours. Around half of those missed callers were trying to give or to volunteer. Average value of a gift, conservatively, \$70. The charity runs a regular-giving program of about 1,500 monthly donors at an average of \$35 a month (\$420 a year), with a slice quietly lapsing each year through declined cards and cancellations.

Where the return comes from	Illustrative annual figure
<b>Captured gifts</b> 25 missed calls/wk × ~50% who wanted to give × \$70 × 48 weeks. The biggest line, and appeal-night calls alone often cover the fee.	<b>\$42,000</b>
<b>Regular givers saved</b> Prompt, friendly save-calls on declined cards and cancellations retain ~54 monthly donors a year who would otherwise lapse, at ~\$420 each.	<b>\$23,000</b>
<b>Supporter-care hours returned</b> About 6 hours/wk no longer spent on repetitive calls and follow-up, at a \$40 fully-loaded rate × 48 weeks. Capacity, not cash, but real.	<b>\$12,000</b>
<b>Cost of the agent</b> Indicative annual platform cost for a charity of this size, plus the groundwork time in your first fortnight.	<b>(\$11,000)</b>
<b>Net illustrative return</b> Recovered income and returned hours, less the cost of running it.	<b>\$66,000</b>

Read it conservatively and the case still holds. Halve every assumption and the model clears the cost of the agent several times over, on captured gifts alone, before the saved regular givers and the returned hours are counted. We will build this with your real numbers in a short call rather than ask you to take a generic figure on faith.

# What you don't need

Some of what holds charities back is not cost or risk, but a set of assumptions that are simply not true. Here are the ones worth retiring before you start.



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**MYTHS WORTH RETIRING**

# Less than you think.

**YOU DON'T NEED**

- To replace your supporter-care team. The agent takes the repetitive layer, not the people

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- To change your CRM or donation platform. It connects to what you already run

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- To be technical. The rules are written and changed in plain language

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- A long IT project. A working agent is a matter of days, not quarters

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- To let it near a caller in crisis. By design, it never goes there

**YOU DO NEED**

- + A clear picture of why supporters call, and your gift and volunteer rules

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- + Agreement on what always goes to a human

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- + Your privacy, consent and fundraising wording confirmed

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- + One owner inside the charity who watches the reports

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- + A willingness to start with one job and grow from there

The honest summary is that the barrier is smaller than the reputation of "AI in the charity sector" suggests. You are not rebuilding your charity. You are adding a reliable, well-governed layer to the supporter desk and keeping a firm hand on what it is allowed to do.

# In practice

Three composite charities, drawn from the kinds of deployments this technology suits. The names are illustrative; the situations are not.



## COMPOSITE CASE STUDIES

# What changed, and how fast.

## COMPOSITE · COMMUNITY WELFARE

## A mid-sized welfare charity

Appeal nights overwhelmed a small desk; gifts lost to voicemail.

0

appeal-night calls to message bank after going live

### The appeal night, captured.

The charity's worst moment was the evening an appeal aired, when calls surged and the desk was closed. The agent now answers every call through the night, takes the gift securely and sets up the monthly donors, then leaves the morning team a full record.

Within the first fortnight the lapsed-giver list, which had been rolling over for months, was worked through by the agent in the quiet hours, and the regular-giving income steadied.

## COMPOSITE · ANIMAL RESCUE

## A small animal rescue

One part-time coordinator; after-hours enquiries lost overnight.

## After hours

donations and enquiries now captured instead of lost

### The overnight enquiry, kept.

Most donation and adoption enquiries came in the evening, when the rescue was unstaffed and the caller was deciding on the spot. The agent now answers, takes the gift or captures the enquiry, and books a callback for anything that needs a person, so the team wakes up to support rather than a silent message bank.

COMPOSITE · NATIONAL  
CHARITY

## A national, multi-program charity

One supporter line across  
appeals, volunteering and  
program enquiries.

**3→1**

program lines, one consistent  
supporter desk

## One supporter desk for every program.

Calls about different programs were handled differently, and volunteers and donors often slipped between the cracks. The agent gave the charity a single, consistent front desk: it routes each caller to the right program, takes gifts and volunteer sign-ups, and applies the same consent and fundraising wording everywhere.

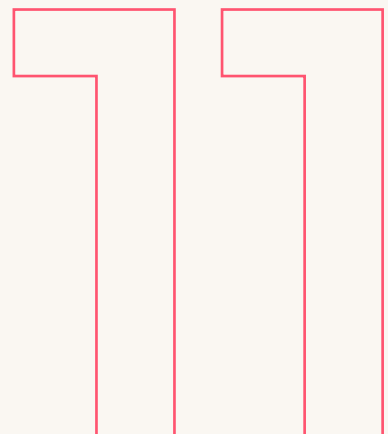
Supporter-care staff were freed from the phones during the day, and the charity could finally see, in one place, how many calls came in and what happened to them.

### A NOTE ON THESE EXAMPLES

These are composites built to illustrate common patterns, not named charities. Your results depend on your call volume, your fundraising rules and how you choose to use the agent. We are happy to talk through a realistic picture for your specific organisation.

# Questions charities ask

The questions that come up in almost every first conversation, with straight answers.



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**FREQUENTLY ASKED**

# The honest answers.

## Will supporters know they are talking to an AI?

Yes, always. The agent tells callers plainly that they are speaking with your charity's automated assistant. Transparency is a requirement, not an option, and a caller can ask for a person at any time.

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## What happens if a caller is distressed or in crisis?

It does not counsel or assess. It recognises distress, responds with care, directs the caller to Lifeline (13 11 14), triple zero (000) or the right service, and escalates to a person. The whole guide is built on that boundary.

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## Can it take donations securely?

Yes. Gifts are processed through your existing, secure donation platform, so card details are handled to that provider's standard. The agent sets up regular giving, records the supporter in your CRM and sends the receipt and tax wording.

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## Does it work with our CRM and fundraising tools?

It connects to common supporter CRMs and donation platforms through permissioned access, reading and writing only what you allow. We confirm compatibility with your specific tools before you commit to anything.

### **Will it pressure people to give?**

No. It is built to the National Fundraising Principles: honesty, transparency, donor protection and respectful communication. It respects every "no" and every do-not-contact choice, and it never guilt or pushes a supporter.

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### **Where does our supporter data go?**

It is handled under your privacy policy and the Australian Privacy Principles, with sensitive information treated accordingly, encrypted, and held within boundaries you control, which for Australian charities typically means Australian data centres. Every interaction is logged.

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### **Will it replace our staff or volunteers?**

No. It takes the repetitive, interruptive layer of the work so your people can focus on relationships, major donors and the calls that need a human. Charities generally redeploy their people rather than reduce them.

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### **Can it handle volunteers and lapsed-donor follow-up?**

Yes, and this is often where charities feel the change first. Confirming volunteer shifts and following up declined cards and lapsed givers is exactly the patient, repetitive outreach an agent does without fail.

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### **How long until it is live?**

Days, not quarters. The groundwork in Section Seven is the main task, and most of it is writing down how your charity already runs. After that, configuration and testing are quick.

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# Your first seven days

A short, concrete path from reading this guide to a live agent answering your phones. Three steps, one week.



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**FROM HERE TO LIVE**

# Start with one job. Grow from there.

**DAYS 1-2****Map the basics**

Work through the Section Seven checklist. Pin down your top call reasons, gift and volunteer rules, escalation points and consent wording. This is the real work.

**DAYS 3-5****Configure and test**

We set the agent up to match your rules, connect it to your CRM and donation platform in a controlled way, and test it together against real call scenarios until it sounds like your charity.

**DAYS 6-7****Go live on one job**

Start with a single job, often after-hours and appeal-night calls, or volunteer confirmations, watch the reports, then widen its remit once you trust it. Small start, fast confidence.

**THE ONE DECISION TO MAKE THIS WEEK**

You do not need to commit to a full rollout. Pick the single job that hurts most right now, the appeal-night calls, the lapsed regular givers, or the volunteer roster that is never confirmed, and let an agent take just that. The rest follows from what you learn.

When you are ready, the best next step is a short walkthrough where we build a realistic picture for your charity: your numbers, your rules, and a clear view of what the agent would and would not do. No generic figures, no pressure.

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# Answer every supporter. Never cross the line of care.

A digital worker that works your phones, your gifts, your volunteers and the supporters you would otherwise lose, governed by your rules and kept firmly clear of care and counsel. Built for Australian charities.

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## TALK TO US

Agentic.ai  
Book a 20-minute walkthrough for your charity

## ABOUT THIS GUIDE

General information only.  
Not legal, privacy or fundraising advice.  
Confirm your obligations with the appropriate adviser.