Is the future of Supporter Experience agentic?

How agentic CRM is changing supporter experience, and what the charity sector can do to prepare



manifesto

Hello and welcome!



Lou Barton

Principal Consultant
Customer Experience
and Engagement

The next 30 minutes…

We start with **what** supporters are asking for,

move on to **why** agentic could deliver it,

and finish with **how** you could start (*safely*).

And then chat about it!



Hello, we're manifesto

We bring together human-centred design, data, technology and new ways of working to help purpose-led organisations grow with confidence, adapt with resilience and deliver lasting impact.

We work with some incredible organisations...



What are supporters wanting?

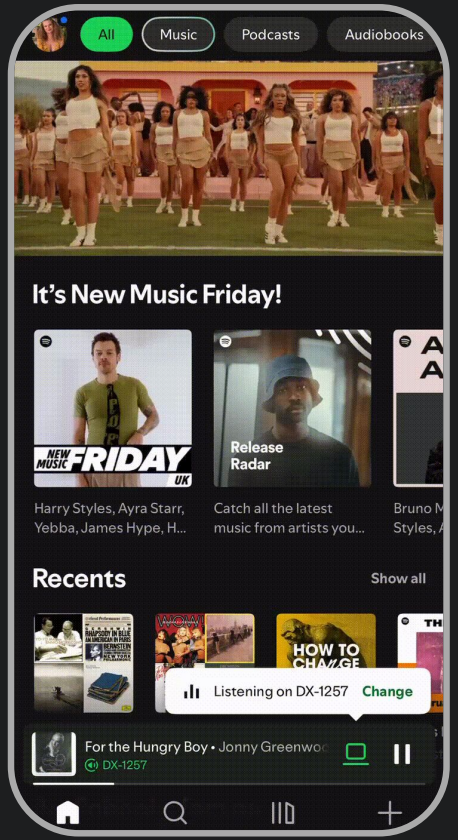
We are not competing with other charities on experience.

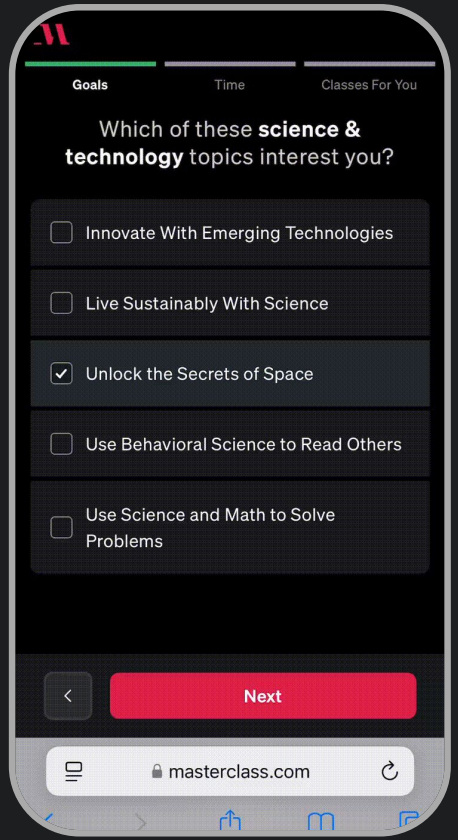
We are competing with the best experience a supporter has had with any company, anywhere.

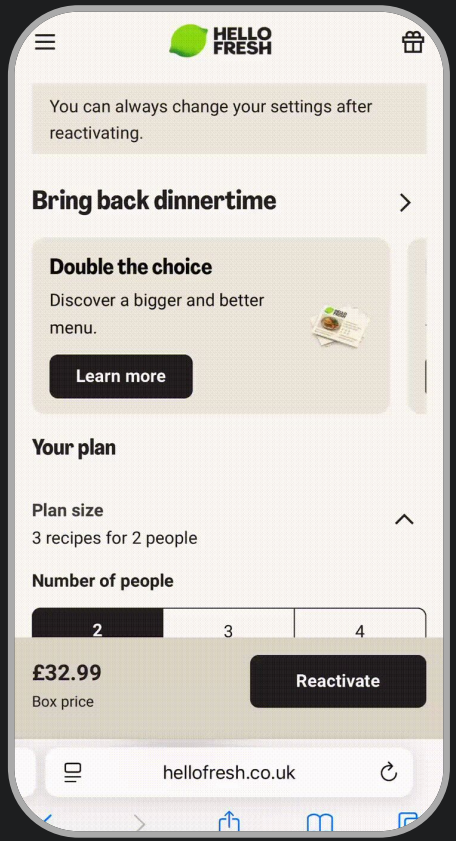
This is what you're *really* competing with

Expectations are refreshed with every interaction we have.

Everytime we're **delighted or disappointed** it resets the bar







And now with AI, those with budgets and a willingness to experiment have rocket boosters



And we’re trying to run in brick flip flops

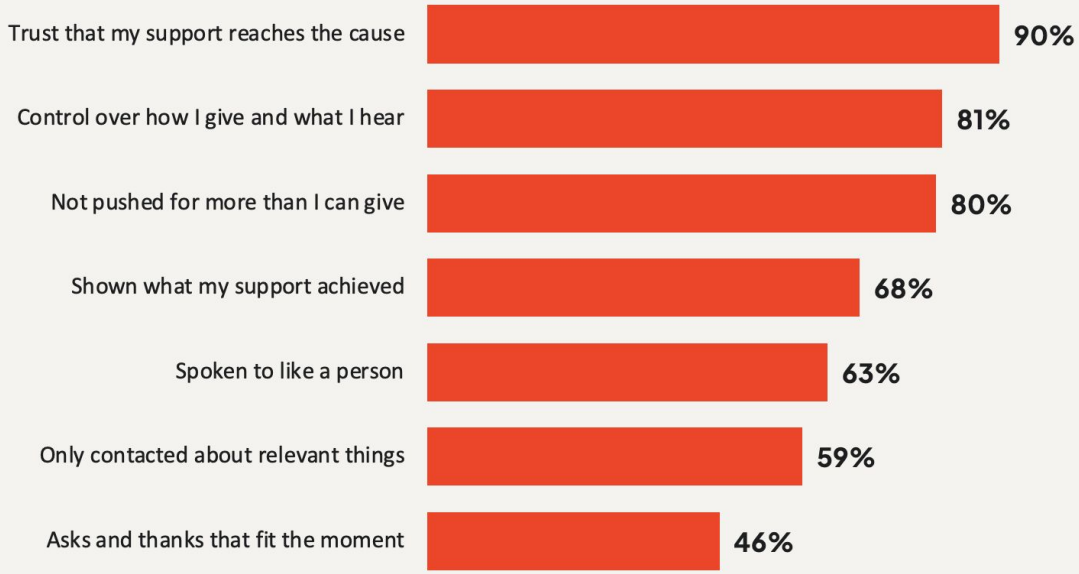


Our shared problem

What audiences are seeking has **changed**.

The gap between what audiences **want**, and what organisations are **delivering** is widening.

It is not a mystery what supporters are asking for



Very satisfied donors are twice as likely to give again.

Sergeant, 2001

Share rating each as very important in an experience
Manifesto experience gap research 2026, 1,600+ current supporters

But, it is hard to deliver

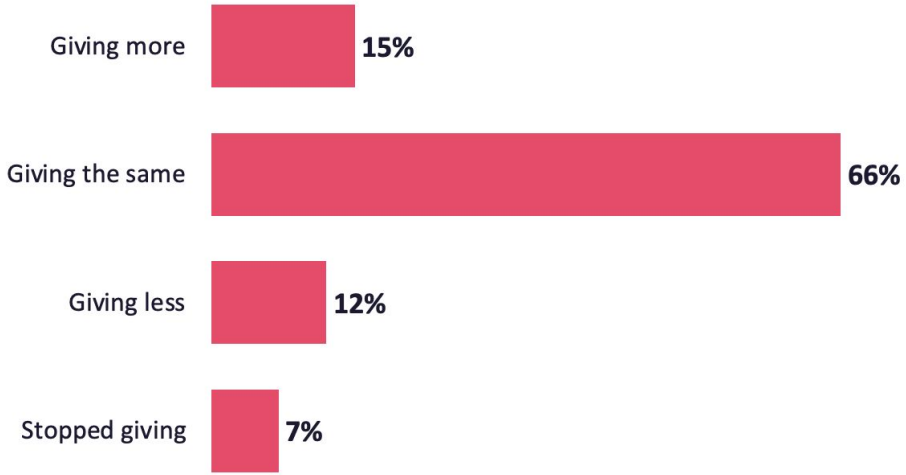
Because of the way data, teams and our tech are set up.

Most supporters have stalled in giving

85%

of supporters aren't growing their giving.

Manifesto experience gap research 2026. Survey of 1,543 UK supporters.



Not meeting these needs over time is resulting in…

64%

Current supporters have considered stopping because they are asked too forcefully, often or too soon

35%

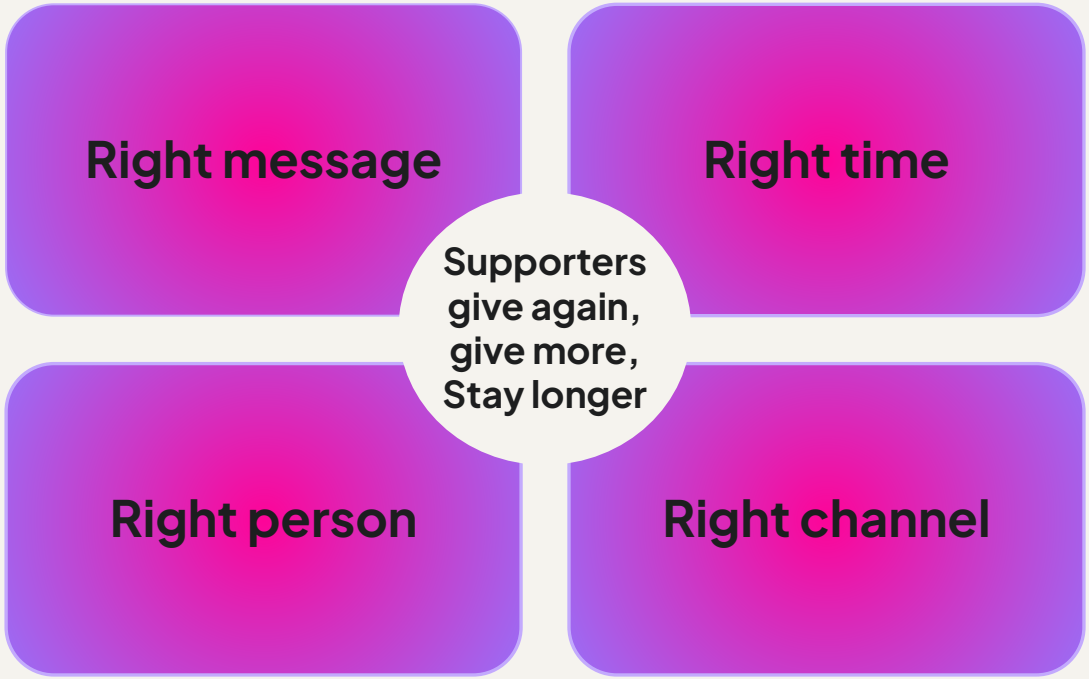
Lapsed supporters cite being asked too often as a reason they gave less or stopped

Supporter journeys need to change.

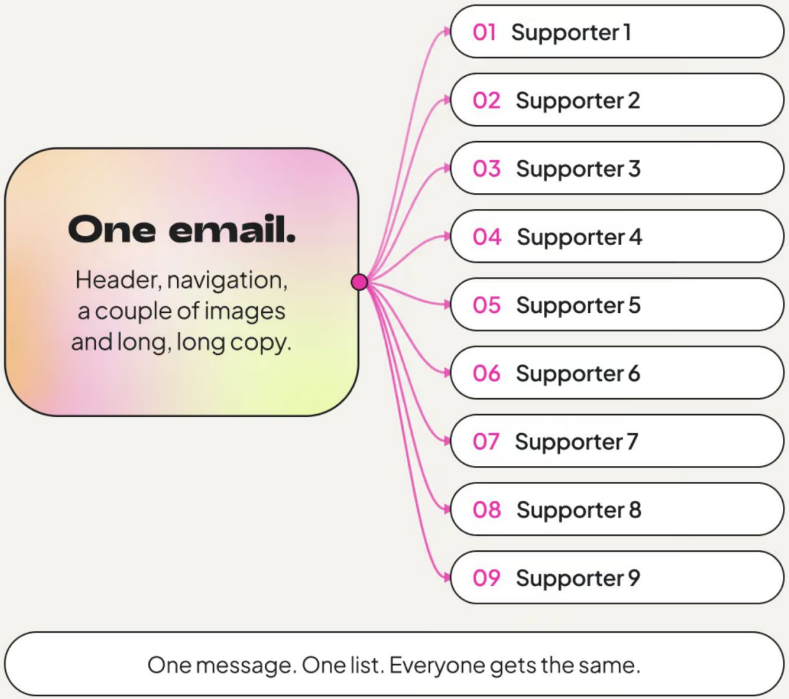
Enough of that doom and gloom

🙏 Solutions please 🙏

The marketing promise is now within reach



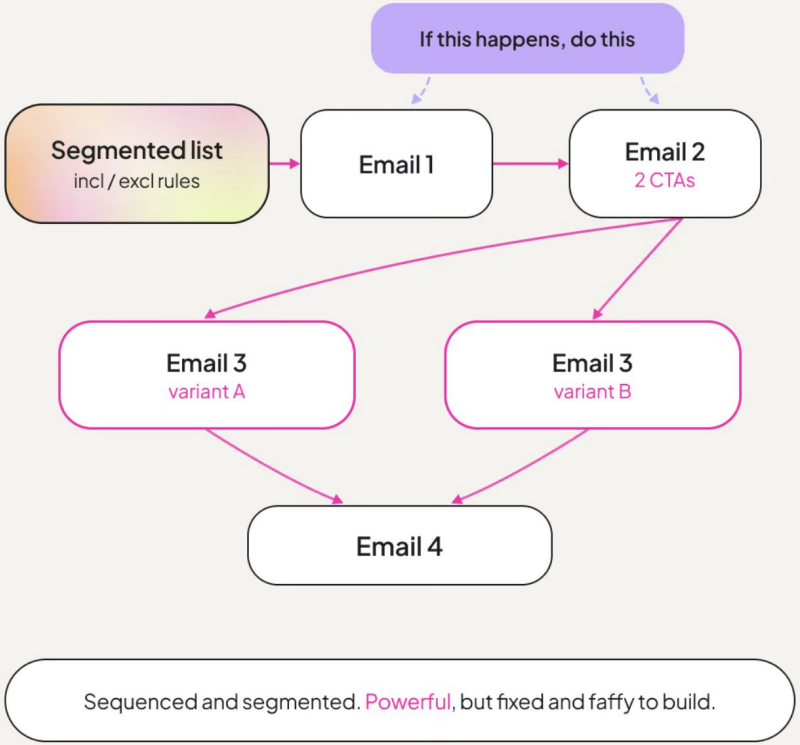
Journeys 1.0, lists and messages



Usually downloaded and uploaded manually.

You might have planned the journey a sequence on paper but set up each email as a single send.

Journeys 2.0, sequences with logic

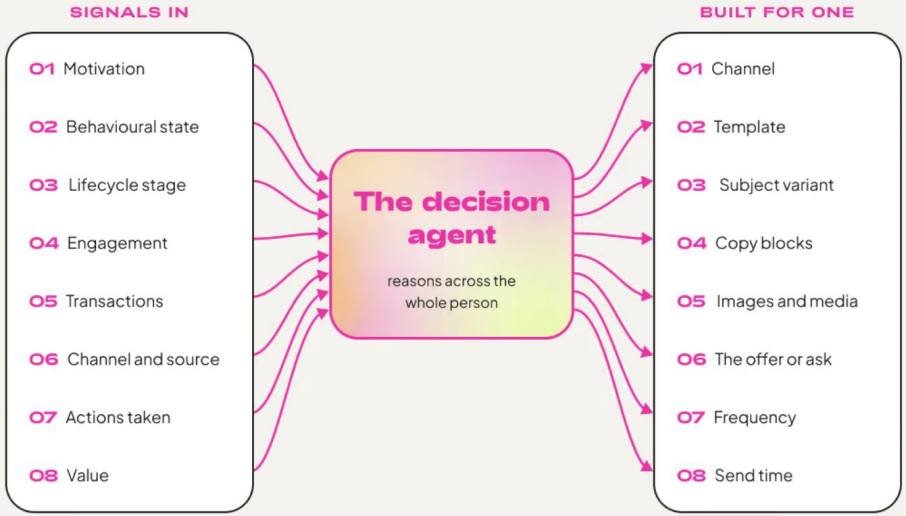


If this happens, then do this.

Segmentation and personalisation defines journey directions.

The more you followed the supporter need and personalised, the more complex it got

Journeys 3.0, decisions made 1:1



Data we capture on our supporters powers a decision maker **(the agentic part)** that can pick the right pre-approved content and put together the message, and execute.

Agentic is…

A tech system that decides and acts toward a goal

An agentic system is given an **objective**, a **menu** of approved options and a set of **limits**, then decides which option fits best, and executes based on data collected and stored on the supporter.

Netflix and Uber are doing this now

NETFLIX

The friction: A fixed frequency can't tell whether sending today pushes someone toward cancelling, or whether staying quiet lets them drift away unnoticed.

The agentic decision: The agent is built to read patterns in your engagement behaviour to identify fatigue, opt-out risk and cancellation risk, weighs that against the value of reaching you, and decides whether to send at all, and what to send, at the moment it sends.

Uber

The friction: A fixed offer can't be right for everyone.

The agentic decision: The agent is built to read your location, previous behaviour and predicted response patterns, then assembles the message from approved parts of content at the moment it sends, so your version updates as your situation changes.

Both select from approved content and assembles it.
The AI never free writes to the customer

Source Tom Burrell, Retention Blueprint episode 94

How it works

1	**Capture it**	**What supporters do and why.** Transactional, relationship (eg. loyal vs. new), behavioural, motivational.
2	**Store it**	**To identifiable level.** Either through data warehouse, or Customer Data Platform with identity resolution
3	**Second brain feeds it**	**Your content generating AI.** All your expertise in a AI system to create content with guidance and limits
4	**Decide on it**	**The agent reasons and decides.** Decision agent is built (with a range of tools) with criteria and policies
5	**Give it a menu**	**Pre-approved, tagged content.** Eg. by theme, cause area, motivation - could be held in CMS, CXP, DAM.
6	**Execute it**	**The execution of send goes through your CXP platform.**
7	**Measure it**	**How it landed, fed straight back in.** Results flow back to the record and the decision agent

GOVERNANCE AND AUDIT

Spans every step

Position limits
EG.Hard caps on contact frequency, offers allowed and who must never be asked

Full audit trail
Every decision logged - who, when, channel, signal, content and policy used

Surveillance:
Watches the whole base, not one message, to catch patterns a single check misses

The mandate:
The goal we set the agent, written down and reviewed so it can't drift

An example

The goal. Ask the right supporter the right thing, at the right time for them

Step	What we do
1.Capture it	Log his action, value, his channel and the motivation from a golden question
2. Store it	Join his gift, motivation and previous activity into one record in data warehouse
3. Second brain	Tagging for lapsed, engaged, motivational segment gets this type of content at this time
4. Decide on it from the menu	The **agent** reads his signals and after while of receiving personalised 1:1 impact content, identified through propensity score he is likely to support again
5. Execute it	Deliver an ask through a selected channel based on his behaviour
6. Measure it	Feed his sign up back into his record, the second brain and the agent

An example

The goal. Ask the right supporter the right thing, at the right time for them

Step	What we do	What a supporter would experience
1.Capture it	Log his action, value, his channel and the motivation from a golden question	A rewarding giving experience
2. Store it	Join his gift, motivation and previous activity into one record in data warehouse	A relevant thank you tailored to his motivation and recognition from last support 3 years ago
3. Second brain	Tagging for lapsed, engaged, motivational segment gets this type of content at this time	Content that feels like it's tailored to him on the channel he uses
4. Decide on it from the menu	The **agent** reads his signals and after while of receiving personalised 1:1 impact content, identified through propensity score he is likely to support again	He opens every email and clicks, as it feels relevant and engaging to what he cares about
5. Execute it	Deliver an ask through a selected channel based on his behaviour	An ask that is tailored to his impact, his motivation and his engagement
6. Measure it	Feed his sign up back into his record, the second brain and the agent	His next contact will reflect this choice

So how can we move towards agentic journeys?

Step one: collecting the right data

Currently just 3% of charities can attribute data back to a single customer record.

Agentic will not work without this foundation.

What to collect	Supporter need	What charities today store to customer level
Channel, topic and frequency choices	Gives control	**24% hold at supporter level**
Why they give	Makes it personal	**30% record a motivation**
Behaviour such as opens and visits	Identifies super engaged, spots drift ealy	**38% engagement data**
Every gift and action joined up	Shows the whole relationship	**37% all transactional data**

Step two: creating the second brain for content

What goes in

- What each lifecycle stage outcome and what good looks like
- Your audience segments and the insight, what they respond to, what they care about, why they give
- Why people give and why they leave
- Behavioural science and retention principles
- Channel best practice and guidance
- Your brand guidelines, tone of voice,
- Your rights and the Code of Fundraising Practice
- Content performance, what worked for who and what channel
- Case studies and good practice



What comes out

Quality content at scale that can be assembled for 1:1 communications.

The menu need to be approved, tagged content so the agent chooses from.

Obsidian

Where to start experimenting, safely

PHASE 1. BUILD IT SMALL

1. **Pick one moment**
   One that is not working well, such as the first 6 months after a first gift.
2. **Get the signals right**
   Identified data capture (could just start with engagement and transactional data)
3. **Write a small menu**
   A short list of approved actions based on decisions you / your team would make

PHASE 2. PROVE IT FIRST

5. **Create content variants**
   Tagged by their purpose and suitability
4. **Run it in shadow mode**
   Against past records (not putting anything life), so it logs what it would have decided.
6. **Check it with a panel of peers**
   Would they have made the same call? If yes, can look to inbed in the CXP

Get this right…

You are more timely and relevant.

More relevant, more satisfied.

More satisfied. More engaged.

More engaged. More likely to give again.

Thank you for listening!

Any questions

Linkedin: Lou Barton – follow for more agentic content!

manifesto

Bringing together human centred design, data, technology and new ways of working to help purpose driven organisations thrive.

manifesto.co.uk

Proudly part of

TPXimpact

Certified B Corporation