

Before Your Virtual Engagement Officer Goes Live

What to expect during Autonomous Fundraising onboarding

The Three-Phase Framework

PHASE 1

Virtual Engagement Officer (VEO) Creation

Your VEO gets a name, an optional avatar, and a landing page, with your approval every step of the way.

PHASE 2

Portfolio Development & Delivery

Identify which donors will make up the VEO portfolio and set up a data exchange with your CRM.

PHASE 3

Knowledge Base Development

The VEO sources from approved organization sources—website, newsletters, annual reports, social media, etc.

① *The VEO avatar is a great identifier for the VEO, but portfolio composition is what drives results.*

The Path to Launch



Step 1:
Kickoff Call

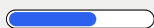


Step 2:
Portfolio Conversation



Step 3:
Data Call

If Needed



Step 4:
Progress Call

If Needed



Step 5:
Pre-Launch Check-In



Step 6:
Go-Live

Most partners launch within three to four weeks, guided at every step by a dedicated onboarding manager and CSM.