Grants from Start to Finish: Prompts to Try in WIZE

Grant work has a lot of moving parts: finding funders, researching them, writing, tracking deadlines, and reporting back. WIZE can help with every step, and it works best when you ask for it in plain language. This guide gives you a prompt for each stage of the grant lifecycle, with a short note on when to use it and what you get back.

How to use it: copy a prompt into the WIZE chat and replace anything in [square brackets] with your own details. WIZE reads your About Us, Tone and Style, past proposals and tracker, and it can use your connected inbox, calendar and CRM, so the more of these you have in place, the better the results. Review every draft before it goes to a funder, and check anything WIZE flags for your attention.

Build a funder list. A good first step when you are starting a search or refreshing your pipeline. WIZE reads your About Us and your Grant Pipeline Tracker, skips funders you already track, and returns a mix of foundations and corporate funders in a document, with anything to verify flagged. Fill in your program area, region and typical grant size.

> Find 10 funders that could fit [organization name]. Read our About Us document and our Grant Pipeline Tracker first, and leave out anyone already on the tracker. Include a mix of foundations and [3] corporate funders. Focus on [program area] in [city or region], with grants in the range of [$ amount to $ amount]. Put the list in a document and flag anything I should verify.

Find small or local funders. Smaller family and community foundations are often a better first fit than national names. This prompt asks WIZE to focus on funders close to home and show what each has funded recently, so you can judge fit before you spend time on an application.

> Find [5] small or local foundations that fund [program area] in [county or region]. Show me what each one has funded recently and why it might be a fit.

Search open federal grants. If government funding could fit your work, WIZE can search open federal opportunities and tell you which ones are worth a closer look, with deadlines and eligibility in view.

> Search open federal grants that could fit [organization name]. We work on [program area] with [population] in [location]. For each one, tell me the agency, award size, deadline, who is eligible, and how well it fits us. Skip anything we are clearly not eligible for.

Research one funder before you ask. Once a funder looks promising, have WIZE look at its website, its 990 and its past grants. You get what they fund, typical grant size, who decides, how to apply and a fit rating out of 5. WIZE also tells you what it could not find, which tells you what to check on the funder's own site.

> Do a deep dive on [funder name]. Look at their website, their 990, and their recent grants. Tell me: what they fund, typical grant size, who decides, how to apply, any program officer names listed, and how well they fit [organization name] on a scale of 1 to 5. Tell me what you could not find and what I should verify.

Decide whether to apply. Not every funder that looks good is worth the effort. Ask WIZE for a go or no-go recommendation based on mission fit, eligibility, grant size against your ask, deadline and the work required, so your team puts its time where it has the best chance.

> Assess whether we should apply to [funder name] for [program or project]. Look at mission fit, eligibility, typical grant size compared with our ask, the deadline, and how much work the application will take. Give me a go or no-go recommendation with your reasons, and tell me what you could not verify.

Learn from a past decline. If a proposal was turned down, upload it and let WIZE compare it with what the funder says it funds. It shows where the application may have drifted from their priorities, which helps you decide whether to reapply and what to change.

> Here is our most recent proposal to [funder name] that was not funded. Compare it with what the funder says it funds and tell me where we may have drifted from their priorities.

Pull out the funder's requirements. Before you write anything, turn the guidelines into a clear checklist. WIZE lists every question, limit, attachment and deadline in the funder's order, so nothing is missed once you start drafting.

> Read the attached guidelines from [funder name] and make a requirements checklist. List every question or section in their order and wording, each word, character or page limit, required attachments and formats, eligibility rules, and the deadline. Tell me anything that is unclear.

Draft a letter of inquiry. Many funders ask for a short letter before a full application. WIZE can draft one that shows fit, describes the work and states the ask, using your own documents.

> Draft a letter of inquiry to [funder name] of no more than [number] pages for [program or project]. Use our About Us, Tone and Style, and past proposals. Show how our work fits their priorities, describe who benefits, state the amount we are requesting and the total project cost, and mark any gaps with a placeholder.

Draft an application from the guidelines. Give WIZE the funder's guidelines and it writes a first draft that follows their word limits and section order, using your About Us, Tone and Style, case for support, past proposals and budget. If the program officer emailed you questions, WIZE can read that email and answer each one. Assumptions and gaps are listed so you know what to fill in.

> Draft our application to [funder name] using the attached guidelines. Follow their word limits and section order. Use our About Us, Tone and Style, case for support, past proposals, and program budget. Read the email from the program officer in my inbox and answer every question they asked. Do not make anything up. If you have to assume something, list the assumption. Mark every gap with a placeholder and give me a list of what you need from me.

Adapt a past proposal for a new funder. You rarely need to start from scratch. WIZE can take a proposal that worked and shift the emphasis toward a new funder's priorities and vocabulary while keeping your facts and figures intact.

> Adapt the attached proposal for [funder name]. Keep all of our facts and figures. Shift the emphasis and wording to match their stated priorities, follow their format and limits, and list what you changed and what I need to confirm.

Write the budget narrative. Reviewers often read the budget first. WIZE can write the narrative that explains each major line and check that the numbers match the story in your proposal.

> Write a budget narrative for the attached budget. Explain each line that is 5 percent or more of the total or that might be unclear, and check that the totals, staff roles and number of people served match the proposal. List any mismatches.

Strengthen the sustainability section. Funders want to know the work continues after their grant ends. WIZE can help you describe specific plans instead of general promises.

> Draft the sustainability section for our application to [funder name]. Use the funding sources and plans in our documents, such as individual giving, other grants and earned income. Name specific strategies, and mark with a placeholder anything I need to confirm.

Check your draft against the RFP. Before you submit, ask WIZE to go through the RFP question by question and tell you whether each one is fully answered, partly answered or missing, and whether it fits the limit. The biggest gaps come first, so you fix the most important things with the time you have.

> Go through the attached RFP question by question. For each one, tell me whether our draft answers it fully, partly, or not at all, and whether it is within the limit. Lead with the gaps most likely to cost us the grant.

Check word and character counts. AI tools often guess at counts. WIZE counts the words and characters in your text with a tool, so you see exactly how far over or under each section is. It then suggests cuts that keep your figures and any required content.

> Count the words and characters in each section of this draft and tell me how far over or under the limit each one is. Then suggest cuts that keep our figures and required elements.

Set up your grant pipeline. This is the one that connects everything. WIZE builds a Grant Pipeline Tracker for your funders and opportunities, and a weekly scout that keeps adding to it.

> Set up our grant pipeline. Create a Grant Pipeline Tracker with columns for funder, opportunity, amount, deadline, status, fit notes, source link and contact. Add the grant research we already have, then set up a weekly Grant Scout that finds new opportunities for [organization name].

Review what the scout found. Each week you decide what is worth pursuing. Tell WIZE your decisions and it updates the tracker.

> Show me the new Prospects on our Grant Pipeline Tracker. Mark [funder name] as Researching and [funder name] as Not a Fit, and keep the reasons in the notes.

Start an application project. When you decide to apply, WIZE can create a project board with tasks scheduled backward from the deadline.

> We are applying to [funder name] for [opportunity]. Update the tracker to Applying, create a project for this application, and add tasks scheduled backward from the deadline of [date]. Assign the draft to [team member] and the review to [team member].

Turn deadlines into tasks. WIZE reads your Grant Pipeline Tracker and creates a task for each deadline, plus the steps leading up to it, such as the letter of inquiry, draft, review and submission. Tasks go to the right teammate with reminders, so the work stays visible and nothing slips.

> Look at our Grant Pipeline Tracker and create a task for each grant deadline, including the steps before it (letter of inquiry, draft, review, submission). Assign them to [team member] and set reminders. Update the tracker with the dates.

Change dates or owners in plain language. When a deadline moves or a teammate takes over, tell WIZE instead of editing each task by hand. It updates the tasks for you.

> Move the [funder name] deadline task to [date] and assign the draft to [team member].

Set up a weekly Grant Scout. WIZE can look for new opportunities for you every week. It checks your tracker first so it never suggests a funder you already have, adds each new find as a Prospect with a short note on why it fits, and drafts any emails for you to review and send. You review the results each week and decide what to pursue.

> Set up a recurring task every [Monday] that finds up to 5 new grant opportunities for [organization name]. Our focus is [mission, population, geography, program types]. Check the Grant Pipeline Tracker first so you never add a funder we already track. Add each new one with the status Prospect and give me a short summary of what you found and why each one fits. If nothing new turns up, tell me where you searched. Only draft emails, never send them.

Write a grant report. Reports are easier when WIZE starts from what you promised and what happened. Give it the original proposal, your outcomes file and program updates, and it drafts the report in the funder's sections and word limits, flagging numbers you should double-check.

> Write our report to [funder name]. Use the attached proposal to see what we said we would do with the funds, and the attached outcomes file and program updates to show what we did. Follow the funder's reporting sections and word limits. Flag every number you are unsure about.

Log a funder conversation. After a call or meeting with a program officer, drop in your notes and WIZE turns them into a clear record and follow-up tasks, so the relationship does not depend on anyone's memory.

> Here are my notes from my conversation with [program officer] at [funder name]. Write a short contact report with what we discussed, what they said about their priorities, and any commitments. Create follow-up tasks with due dates.

Thank a funder and plan the next step. When a grant arrives, a prompt thank-you and a clear reporting plan set up the next ask.

> We received a grant of [amount] from [funder name] for [program]. Draft a thank-you letter for our [executive director] to sign. Then create tasks for the reporting deadlines and promised updates, and add a reminder to check in with them before the next application cycle.

Prioritize your inbox every morning. Once WIZE is connected to your inbox, you can set up a recurring task that tells you the five emails that need your attention first and why. It is a quick way to start the day.

> Every weekday morning, look through my inbox and tell me the 5 emails I most need to handle today and why.

Prepare for every meeting. With your calendar and CRM connected, WIZE can create a prep sheet for each external call: who the person is, your history with them, and questions to ask. Many executive directors find this one especially useful.

> Look at my calendar for this week and create a prep sheet for every external call. Look up each person in our CRM and online, summarize our history, and suggest questions to ask.

Automate your gift follow-up. A weekly task can review recent gifts, draft a thank-you script for larger gifts and assign smaller ones to a teammate. Set the gift threshold and the people involved to match how your team works. Everything is a draft for your team to review.

> Each week, look at gifts from the past 7 days. For gifts of [$ amount] or more, draft a thank-you script for our [executive director]. For smaller gifts, assign a thank-you task to [team member].