WIZE

WIZE 101 · WEEK 1

Set Up WIZE So It Knows Your Organization

Presented by **Louis Diez** · CEO and Co-founder, WIZE

WIZE

From blank page to your own voice

Upload your key documents once, and every draft after that starts from your organization's own words.

0:00	Open and frame
0:05	What WIZE is, in one minute
0:08	Live setup, one step at a time
0:30	Your turn: set up your own account
0:40	Hot Seat and questions
0:44	What's next and close

WHAT WIZE IS

WIZE

WIZE connects your team and your tools

Your documents

Case statement, past appeals, grant proposals. WIZE drafts from your own words.

Your donor data

Connect your CRM or upload a spreadsheet, then ask questions in plain language.

That is Week 3

Your inbox and calendar

WIZE writes drafts in your inbox. You review and send.

Your team and boards

Shared documents, shared tasks, and work you can hand to WIZE.

Today we do the first step that makes everything else better: teaching WIZE your organization.

THE SETUP PATH

WIZE

Five steps, one organization WIZE knows

1	**Upload your key documents**	Case statement, past appeals, grant proposals
2	**Add your brand**	About Us and Tone & Style, saved as Guides
3	**Save what WIZE learned**	Memory: facts and rules that carry across chats
4	**Invite your teammates**	One shared workspace for documents and tasks
5	**Create your first board**	A home for one project, with a goal

FIND YOUR WAY AROUND

WIZE

Three parts of the screen

Left

The sidebar: **Files**, **Tasks** and **CRM**.

Your initial at the bottom opens Organization settings

Middle

Your work, with open files as tabs and **+ New** to create anything.

Right

The chat with WIZE. Widen it, hide it, or go fullscreen.

Click Chat at the right end of the tabs to bring it back

The chat box sits at the very bottom of the chat, with the Send button beside it.

WIZE

LIVE DEMO 0:08 TO 0:16

Step 1
Upload Your Key Documents

1

WIZE only drafts from what it knows about. The first hour of uploading pays off in every chat that follows.

STEP 1: WHAT AND HOW

WIZE

Start with five to ten documents you are proud of

What to upload

Your case for support, two or three past appeals, a grant proposal or two, brand guidelines, and a donor-facing piece you love.

How to upload

Drag a file onto the WIZE window, or click **+ New** and choose **Upload Files**.

Word, PDF, text, slides and spreadsheets all work

Keep them organized: ask WIZE, "Create a Grants folder and move these three documents into it."

WIZE

LIVE DEMO 0:16 TO 0:22

Step 2
Add Your Brand

2

An About Us and a Tone & Style guide teach WIZE your mission and how you sound.

STEP 2: GUIDES

WIZE

A Guide is a document WIZE reads before it writes

About Us

Your mission, programs, and the language your organization uses for them.

Tone & Style

Formality, sentence shape, word choices, and what to avoid. This decides whether a draft sounds like you.

WIZE starts you with a template version of each. They become yours when you ask WIZE to update them from your own writing.

STEP 2: PROMPT 1

Build your About Us

> I work at **[org name]**. Using the documents I uploaded and what you can find about us online, update our About Us document with our mission, our programs, who we serve, and the words we use to describe our work. Do not invent facts or numbers. List anything you were not sure about at the end so I can check it.

Then check that it is marked as a Guide (book icon).

STEP 2: PROMPT 2

WIZE

Teach WIZE how you sound

> Here are some writing samples I want you to use to update my Tone & Style document: **[attach or name 3 to 5 donor emails, appeals or letters you wrote]**. Describe how I sound, including formality, sentence length, word choices, and what I avoid. Quote a short example for each point so I can check you got it right.

Three to five samples from your most common channel is plenty. Then write something short to test it.

STEP 2: CONFIRM IT WORKED

WIZE

Three quick checks

1	**Look for the book icon**	It shows next to the name of every Guide
2	**Not a Guide yet?**	Open the three-dot menu and choose Mark as Guide
3	**Test and refine**	Ask for something short. Say what is off: "too formal" is enough.

WIZE

LIVE DEMO 0:22 TO 0:26

Step 3
Save What WIZE Learned

3

Memory carries facts and rules from one chat to the next.

STEP 3: MEMORY

WIZE

Two kinds of memory

Personal

Applies only to your chats. Good for how you like to write and be addressed.

Organization

Applies to everyone on your team. Good for facts and rules that should hold for the whole organization.

Open the Memories panel with the sparkle icon in the chat header. Hover a memory to edit or delete it.

STEP 3: PROMPT 3

WIZE

Save your standing rules

> Please remember these for our whole organization: **[for example: our fiscal year runs July to June; we call the people we serve "neighbors"; we never use the word "clients"; letters are signed by our executive director]**. Save each as its own organization memory, then list what you saved.

For a preference that is only yours, say "save this as a personal memory."

WIZE

LIVE DEMO 0:26 TO 0:30

Step 4
Invite Teammates and Connect Your Tools

4

Everyone in your organization shares the same documents, tasks and file library.

STEP 4: TEAM AND TOOLS

WIZE

Invite your team, then connect what you use

Invite a teammate

Click your initial at the bottom of the left sidebar, open **Organization settings**, choose **Members**, then enter a name and email and click **Invite**.

Chats stay private to each person

Connect your tools

Click **Integrations** in the left sidebar to connect your email and calendar, and your CRM if you use one.

Donor data gets its own session in Week 3

WIZE writes email as drafts in your inbox. You review, edit and send.

WIZE

LIVE DEMO 0:30 TO 0:34

Step 5
Create Your First Board

5

A board is a home for one project, with a goal that keeps WIZE pointed at the outcome.

STEP 5: BOARDS AND TASKS

WIZE

One project, one board

Make the board

Click **+ New** and choose **Board**. Name it and write its **goal**: what done looks like.

Add the work

Click **+ New** and choose **Task**. Assign it to a teammate, or to WIZE.

Name the documents to use by their title in the description

Pick something real: a year-end appeal, a grant you are writing, or a board report.

STEP 5: PROMPT 4

WIZE

Let WIZE set up the board

> Create a board called **[project name]** with this goal: **[what done looks like]**. Add the five tasks I need to finish it, each with a short description and a due date working back from **[deadline]**. Use our uploaded documents by title wherever they help.

WIZE

Your turn: 10 minutes

Do the same steps in your own account. Start wherever you are stuck.

1. Upload at least three documents
2. Run the About Us and Tone & Style prompts
3. Save two organization memories
4. Invite one teammate
5. Create your first board

WIZE

HOT SEAT AND QUESTIONS: 0:40 TO 0:44

Two volunteers.
Real work. Live feedback.

> Share your About Us draft, your Tone & Style, or your first board. Louis names what is strong, what is vague, and runs one sharpening prompt live.

- Paste in the main chat
- Specific input gives specific output

HOT SEAT PROMPT

WIZE

Sharpen what WIZE learned about you

> Read our About Us and Tone & Style documents. Tell me what is strong, what is vague or generic, and what is missing that a new writer would need to know about our organization. Then suggest three questions I should answer so you can make both documents more specific.

WHAT'S NEXT IN WIZE 101

WIZE

Each session stands on its own

2	**Grants**	Funder research to final report · Date ✱ to be announced
3	**The new WIZE**	Live launch and demo, from donor data to a ranked list · Date ✱ to be announced
4	**Write Once, Steward Forever**	Appeals, emails and thank-yous in your voice · Date ✱ to be announced

CLOSE · NEXT STEP PROMPT

WIZE

Leave this in your chat

> Based on everything in this chat, write a short plan for what I do this week to finish setting up WIZE: the documents I still need to upload, what to add to our About Us and Tone & Style, which teammates to invite, and the first three tasks for my board. Keep it to five steps.

WIZE

WIZE now knows your organization.

> Your documents are in, your brand is added, your team is invited and your first board is set up. WIZE connects your team and your tools. You decide, and you send.

Louis Diez · CEO and Co-founder, WIZE