WIZE Counsel

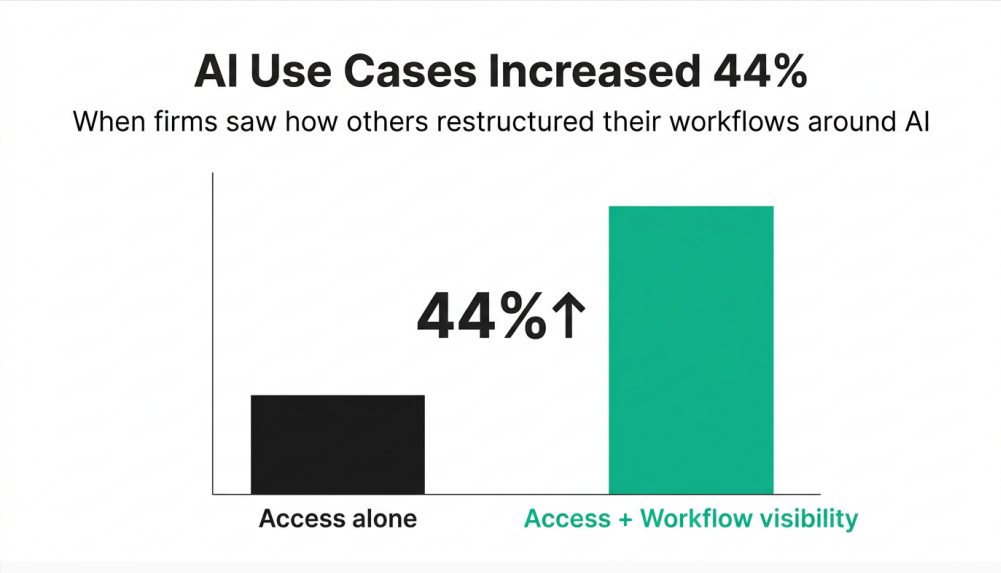
Where Does AI Create Compounding Value?

AI Bootcamp for Fundraising Professionals — Custom GPTs Session

Hosted by AFP MA, Massachusetts Chapter

“We gave everyone AI. Not much changed.”

Research on firm-level AI adoption found that simply giving workers access to AI tools produced modest, scattered improvements.



The finding

When firms were shown *how other firms restructured their workflows around AI* — AI use cases increased by **44%**, concentrated in strategy, operations, and product development.

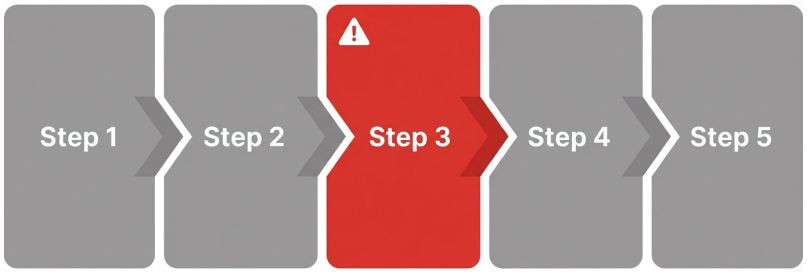
The takeaway

Access alone isn’t the answer. Seeing the whole workflow is.

SOURCE: INSEAD, 2025

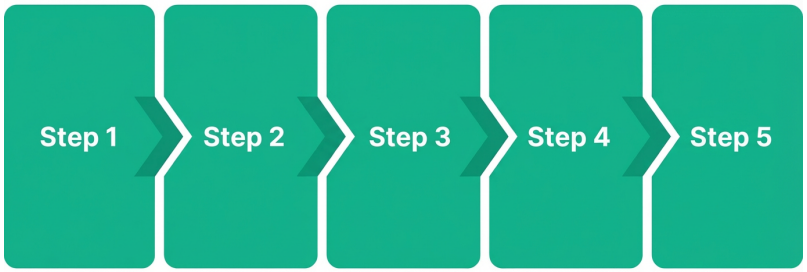
The gain doesn’t come from automating one step.

Before



- When you only automate one task, the bottleneck moves — it doesn’t disappear
- Speed up Step 3 and Step 4 becomes the new constraint

After: Rethink the workflow



- The real gain comes from **rethinking the whole workflow**
- Remove the bottleneck — everything downstream accelerates

Before you build a GPT, map your workflow.

1. **Three case studies — facilitated (15 min)**
2. Individual worksheet (15 min)
3. Pair share + full group debrief (10 min)

A

Three Case Studies

Not which task they automated — but where in the workflow they made the change, and what that unlocked everywhere else.

CASE STUDY 1 — CAPITAL CAMPAIGN OPERATIONS

What if one session moved CRM data, documents, and tasks forward — simultaneously?

Senior living nonprofit, multi-year capital campaign

Before

- Pull giving history from CRM (separate login)
- Search email archive for prior touchpoints
- Review spreadsheet notes from last visit
- **Draft stewardship letter from scratch ← bottleneck**
- Submit to ED for review → revisions
- Manually log follow-up in spreadsheet

After: AI as connective layer

- "Who needs a touchpoint this week?" → Prioritized list
- "Draft a stewardship letter for [donor]" → AI drafts using CRM context
- "Schedule follow-up tasks" → Tasks created in one step
- **The AI became the connective layer — each session moved multiple pieces forward simultaneously.**

CASE STUDY 2 — DONOR LIFECYCLE OPERATIONS

What if post-call documentation stopped eating your afternoons?

Performing arts organization, 2–3 person development team

Before

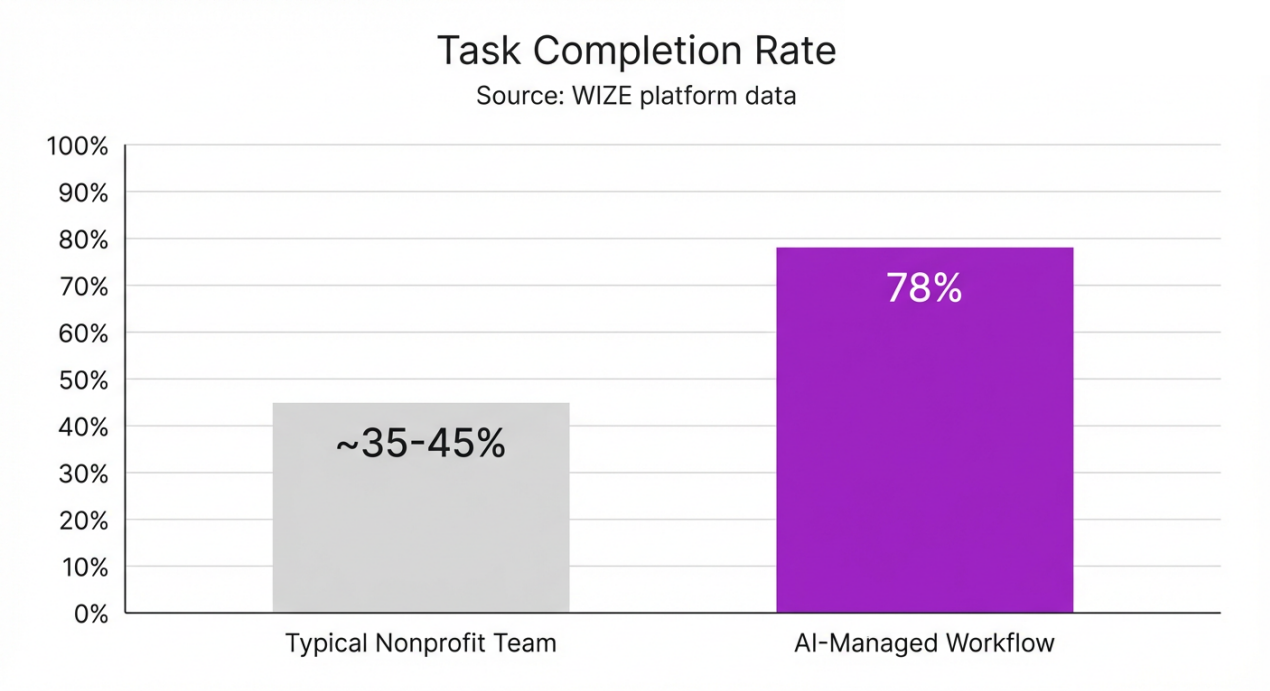
- Finish donor call
- Write up notes (often delayed or skipped)
- Update CRM separately
- Draft follow-up email from scratch
- **Build sponsorship proposal from generic template ← bottleneck**
- Director reviews → requests changes → staff revises

After

- “Analyze this call and make me notes” → Summarizes, flags commitments
- “Write a response about the partnership” → Drafts from CRM context
- “Create a pitch for our summer series” → Builds from prior successful pitches
- Director reviews: **one round of edits instead of two**
- **Staff isn’t doing less relationship work — they’re doing more of it.**

What if your team's 78% task completion rate was the baseline, not the exception?

Medical research institute, development team of 3–4



78%

AI-MANAGED TASK COMPLETION

~40%

TYPICAL NONPROFIT TEAM

The overhead of *managing* tasks dropped to near zero — so tasks actually get created, tracked, and closed instead of living in someone's head.

SOURCE: Source: WIZE platform data

What these three have in common.

In every case, the AI intervention didn't just speed up one task — it changed:

- **What information** was available
- **When** it was available
- **To whom** it was available

The campaign org didn't just get faster letters. The research institute didn't just get better task lists. They got compounding returns because the whole workflow changed.

B

Your Turn

Where is the bottleneck that, if dissolved, would change everything downstream?

15 MINUTES — INDIVIDUAL

The Worksheet: Where Does Your Time Go?

- **Pick one area** of your work (donor stewardship, grant writing, program communication, board reporting, team coordination)
- **Walk through** the last time you did this end-to-end
  - Before: What prep work was necessary?
  - The relationship moment: The call, letter, meeting, site visit
  - After: What follow-through was required?
- **Mark each step:** ⭐ = requires your judgment • ○ = repetitive process / hunting for info / moving data between systems
- **Circle your biggest time drain** that ISN'T the relationship moment itself
- Ask yourself: **Does this depend on information in another system?**

The Key Question

Would your donor/grantor/board member notice if your circled task happened differently — or only if it didn't happen at all?

Process matters

- The donor cares *how* this is done
- Relationship judgment required
- Personal voice and tone matter
- → Keep this human

Only outcome matters

- The donor only notices if it *doesn't* happen
- Same process repeated over and over
- Formatting, data lookup, scheduling
- → **Prime AI territory**

C

Pair Share + Debrief

10 minutes — what you'll discover matters more than what I tell you.

Find a partner. Share two things:

Then ask each other:

- What area did you pick, and what did you circle?
- What would you do with the time if that drain disappeared?

“Would your donor/grantor/board member notice if your circled task happened *differently* — or only if it *didn’t happen at all*?”

The Pattern (You'll Notice It)

The human work is irreplaceable. The prep and follow-through are where AI creates room.

The best fundraisers don't skip the thank-you letters — they write *more* of them, because AI handles the first draft and they spend their energy making each one personal.

A custom GPT doesn't replace the relationship. It gives you the time and mental space to actually show up for it.

Before we move forward, name your leverage area.

Complete this sentence:

"The GPT I want to build today handles **[specific task]**, so I have more time for **[specific relationship work]**."

This becomes your north star for the hands-on section. The WHO-WHAT-WHY-HOW framework we're about to use is the tool to build that specific GPT.

Let’s build it.

You’ve identified your leverage area. You know what problem you’re solving. Now we’re going to show you exactly how to build a GPT that does it.