

In The AI Era: Strategies, Tools, And Case Studies



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**CEE FUNDRAISING 2024
SHARING EXPERIENCE
WARSAW**



AI Boom

150 Czech NGOs

In the last 2 years, I have been helping more than 150 Czech NGOs implement AI into their processes and daily administrative tasks.

Thanks to AI and new technologies, the NGOs have more time to be creative, offer innovative services and make a positive impact.

Instructions

Go to

www.menti.com

Enter the code

2859 2358



Or use QR code

Write emails

I'm on the phone with donors

I work with tables

I communicate

Campaigns, texts, Instagram posts, database work

creating the contents of letters and e-mails (writing texts)

Write emails to donors

They write newsletters

I communicate

creation of marketing lists and campaigns in CRM

I communicate with donors, answer questions, analyze data

I translate professional text for presentation on social networks.

I issue a PoD

Text creation. Data analysis. Communication with donors.

I'm on the phone with donors

I work with data, think and plan, create content, communicate with donors

Challenges in AI Adoption for NGOs

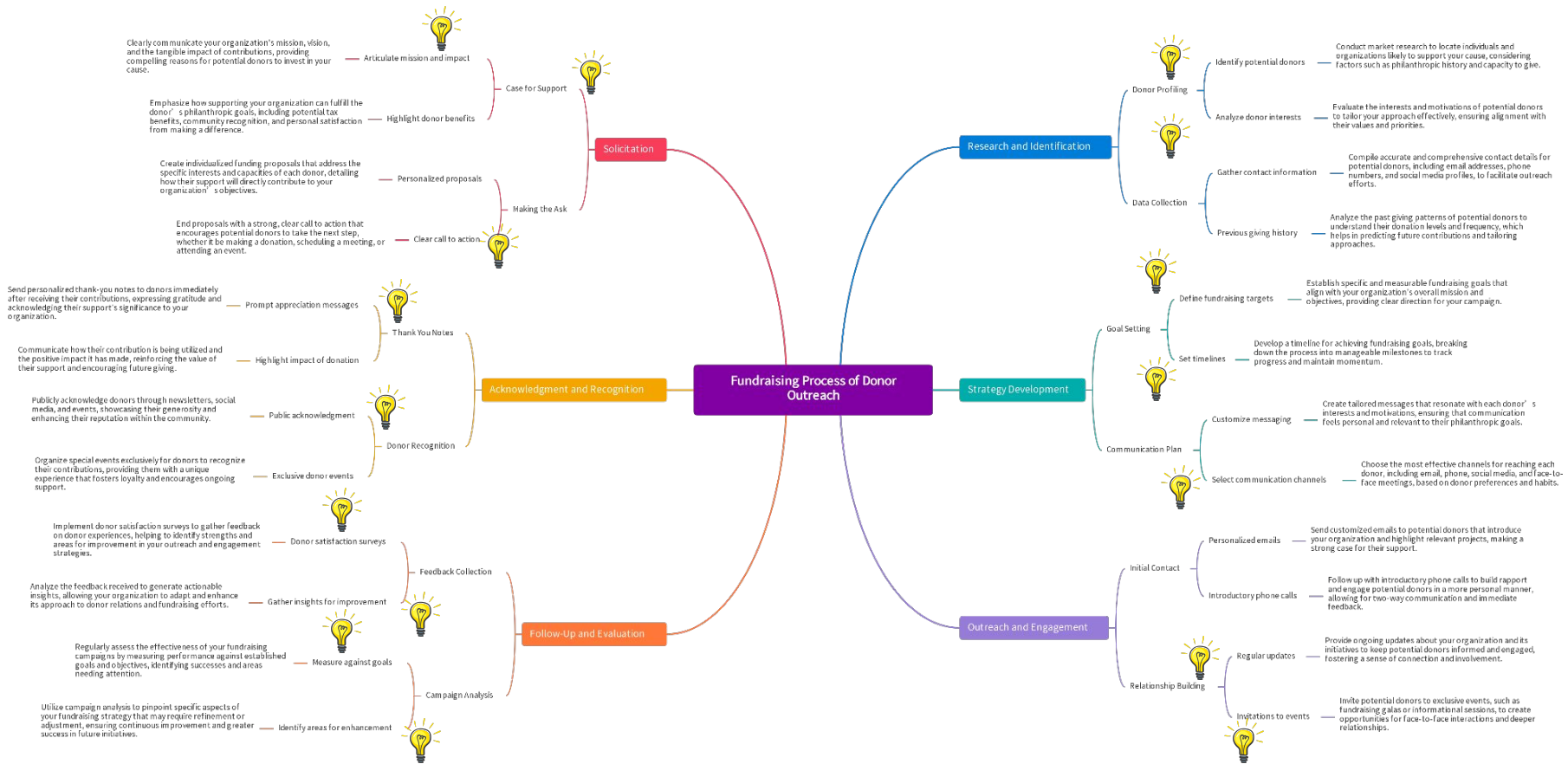
- Generative AI is an exciting and accessible technology
- Many NGOs still struggle with adoption due to internal factors

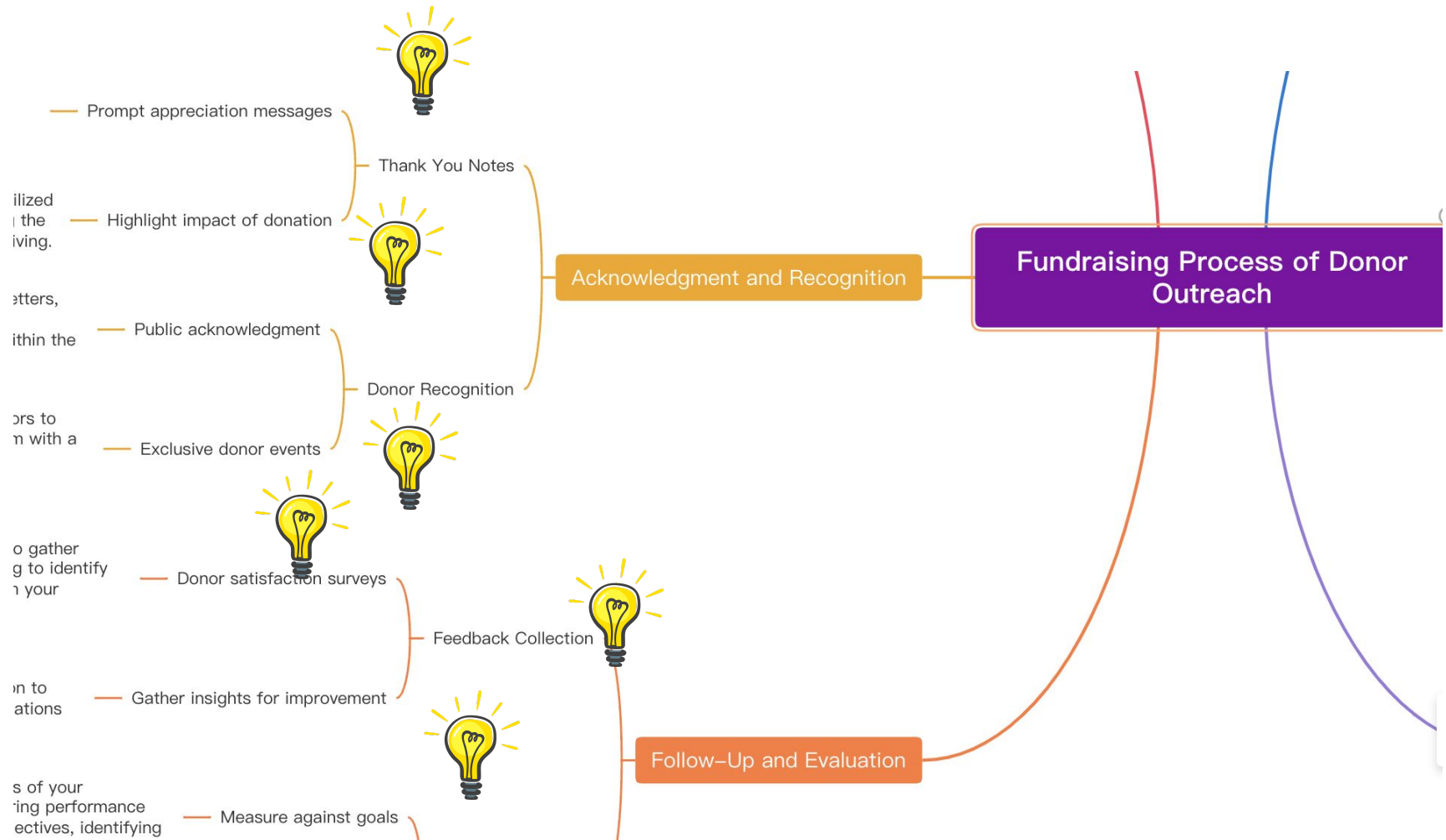
Main challenge: Lack of well-defined internal processes

- Leads to difficulty in identifying where and how to apply AI

What is important:

- NGOs need to optimize workflows before implementing AI solutions





Fundraising Process of Donor Outreach

Strategy Development

Set timelines

Develop a timeline for achieving fundraising goals, breaking down the process into manageable milestones to track progress and maintain momentum.



Customize messaging

Create tailored messages that resonate with each donor's interests and motivations, ensuring that communication feels personal and relevant to their philanthropic goals.

Communication Plan

Select communication channels

Choose the most effective channels for reaching each donor, including email, phone, social media, and face-to-face meetings, based on donor preferences and habits.



Initial Contact

Personalized emails

Send customized emails to potential donors that introduce your organization and highlight relevant projects, making a strong case for their support.

Introductory phone calls

Follow up with introductory phone calls to build rapport and engage potential donors in a more personal manner, allowing for two-way communication and immediate feedback.

Outreach and Engagement

Relationship Building

Regular updates

Provide ongoing updates about your organization and its initiatives to keep potential donors informed and engaged, fostering a sense of connection and involvement.

Invitations to events

Invite potential donors to exclusive events, such as fundraising galas or informational sessions, to create opportunities for face-to-face deeper relationships.

AI-Powered Fundraising Fields

Writing Donor Communications, Appeals, and Reports

Data Analysis, Donor Segmentation, and Predictive Modeling

Preparation, Execution, and Evaluation of Fundraising Calls

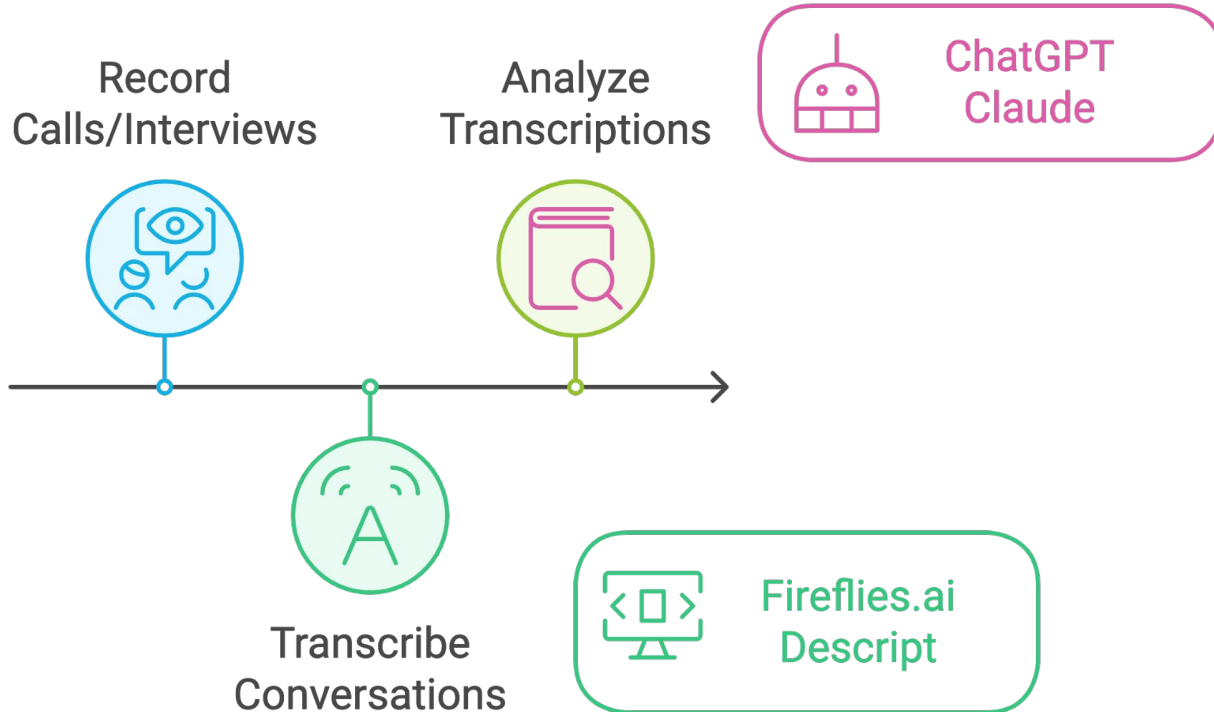
Designing Personalized Donor Journeys and Experiences

Call and Meeting Transcription, Analysis, and Insights

Chatbots for Donor Engagement, Q&A, and Support

Automation of Repetitive Fundraising and Admin Tasks

Call / Interviews Analysis



Example of the call analysis

Kateřina Švidrnochov · 8 minutes ago

VIDEO

The screenshot displays a web browser window with a video call analysis interface. The browser's address bar shows the URL `app.fireflies.ai/view/Lucka-M-odmitnuto-m4a::B7d9p9MB7hmV5Rse`. The interface is divided into several sections:

- Smart Search:** Includes filters for 'Questions' (10) and 'SENTIMENTS' (Positive: 0, Neutral: 0, Negative: 0). It also shows 'SPEAKER TALKTIME' with a table for 'SPEAKERS', 'WPM', and 'TALKTIME'.
- Notes:** A central list of key points from the call, such as 'Volajci ocenuje respondentv prstup' and 'Zvr a budouc spoluprace (02:54 - 04:10)'.
- Transcript:** A scrollable text area showing the spoken words, with a search bar at the top.
- Action items:** A section for tasks derived from the call, including 'Respondent'.

A video player at the bottom shows a play button and a progress bar. A dark overlay at the bottom of the screen contains the text: 'e jsem si vsmla, e potpisyjete nae petice a chtla bych vm za to'.

What Is It Good For

- Improving training and onboarding programs based on identified strengths/weaknesses
- Identifying new fundraising service offerings or enhancements based on customer/donor feedback
- Optimizing calling scripts and outreach strategies using conversational analysis
- Uncovering pain points or friction in the fundraising process to address
- Measuring and tracking key performance metrics over time

Example Personas and call scripts

Kateřina Švidrnochov · 3 minutes ago

VIDEO

The screenshot shows a Chrome browser window with the URL `claude.ai/chat/009a1556-88b5-43ba-9786-d87ae2a18952`. The chat interface is titled "Claude" and "Personas for Fundraising Campaign".

User Prompt:

Hi, I need to create several personas of potential donors that we want to target with a fundraising campaign. Create 3 personas for me and consider the following questions when creating them: What are their main goals and objectives? What problems do they have? How do they manifest? (goal drivers) What motivates them to take action and help? What questions do they ask at what stage of the decision-making process? What do they need to know and when? Where do they get their information from? What and who do they read, listen to and watch?

Claude 3.5 Sonnet (New) Response:

I understand that you need to create three potential donor personas for your fundraising campaign. I will create them with the questions you mentioned in mind.

Artifacts:

- Personas of potential donors for a fundraising campaign (Click to open document • 1 version)
- Callscripts for regular donations (Click to open document • 2 versions)

Content:

No content added yet
Add images, PDFs, docs, spreadsheets, and more to summarize, analyze, and query content with Claude.

Chat styles:

Font: Default

Video Player:

0:02

0:03 / 0:48







AI Agents and Assistants

GPT models

Discover and create your own versions of ChatGPT, offering instructions, extra knowledge and any combination of skills.

🔍 fundraising

All

- **Fundraising Expert**
Enthusiastic expert in fundraising, law, finance, and nonprofit administration.
Author: John Harvey 🔗 1K+
- **Charity and Nonprofit Fundraising Evaluator**
Expert evaluator for fundraising appeal texts. Reports on strengths, areas for ...
Author: George Irish 🔗 800+
- **Fundraising GPT**
Auto Fundraising is trained on 1000+ VCs info and is an expert in building inv...
Author: safurai.com 🔗 600+
- **RAISE Wingman Fundraising Bot**
Your Wingman for startup, tech and real estate fundraising.
Author: NICHOLAS KATZ 🔗 200+
- **FundableAI - Modern Fundraising**
Get professional project concept, list of EU funding opportunities and beautif...
Author: Approved, Kristjan Zemljic sp 🔗 1K+
- **NextLevel Fundraising**
Streamlining fundraising with emails, grant proposals, and social media posts
By Andrya M Lopez 🔗 400+

example fundraisers copywriter

Kateřina Švidrnochov 5 minutes ago

VIDEO

Chrome Soubor Upravit Zobrazit Historie Zlozky Profily Karta Okno Npovda

chatgpt.com/g/g-Eb23DAEwd-fundraiser-s-copywriter/c/672b8ee8-a410-8013-aad0...

Fundraiser's copywriter

ChatGPT

create an e-mail to the donor who donated a year ago and we want to reach him again

Subject: A Year of Impact, Thanks to You!

Dear [Donor's Name],

I hope this message finds you well. It's been a year since your generous contribution to the Children's Hope Foundation, and I wanted to take a moment to personally thank you once again for the difference you made. Because of donors like you, the past year has brought life-changing opportunities to hundreds of children, from nutritious meals to access to education and healthcare.

Your support has fueled stories of resilience and hope. One recent story I'd love to share is of [specific child's name, if privacy allows, or simply say "a young student"], who, thanks to your kindness, received the support they needed to attend school.

Napsat zprvu pro Fundraiser's copywriter

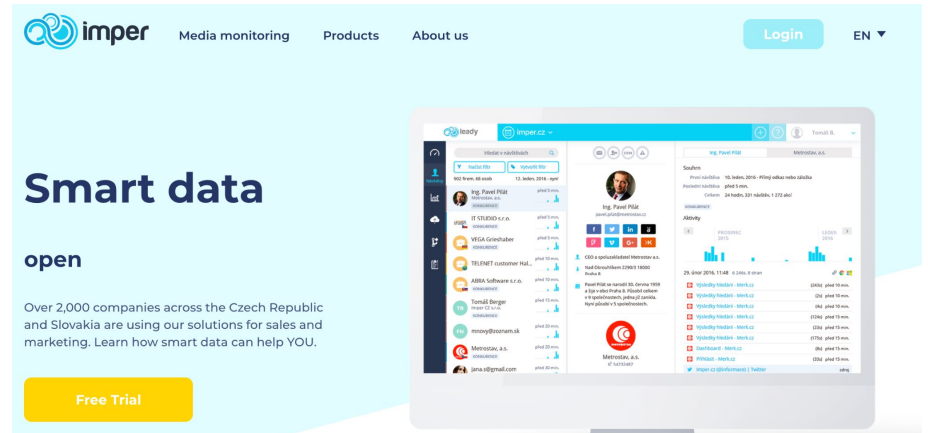
ChatGPT mže dlat chyby. Doporuujeme kontrolovat dležit informace.

What Is It Good For

- Analysis of donor data to create **personalized appeal** letters, emails, social media posts ...
- AI can ensure all fundraising communication has a **cohesive and on-brand feel.**
- Easy creation of fundraising materials in **multiple languages and formats.**
- Data-driven insights into donor behavior and campaign performance to inform your **future strategies.**
- ...

Particular use cases of data analysis

- Analysing data for charity auction based on aggregating data from previous years.
- Addition the data about the partners and donors to the excel sheets by ChatGPT web search or by tools like Imper (future Saleskit).



The image shows the Imper web application interface. The top navigation bar includes the Imper logo, "Media monitoring", "Products", "About us", a "Login" button, and a language selector "EN". The main content area features the heading "Smart data open" and a sub-heading "Over 2,000 companies across the Czech Republic and Slovakia are using our solutions for sales and marketing. Learn how smart data can help YOU." Below this is a "Free Trial" button. On the right, a laptop displays the application's dashboard, which includes a search bar, a list of company profiles (e.g., Ing. Pavel Pátek, IT SLOVO s.r.o., VEGA Group), a detailed profile for Ing. Pavel Pátek, and a bar chart showing data trends over time.

Particular use cases of data analysis

- Sentiment analysis of donor feedback
- Optimizing grant proposal success rates
- Identification of key factors that influence donor loyalty and long-term giving potential
- ...

**autocomplete data
into the excel sheets, clean it and
analyse it**

**training the interviews with the
donors - training, analysis,
feedback, identification of parts
to be improved**

**automatic transcription of a
conversation, a meeting with the
postproduction to the meeting
notes, structured forms**

**creation of tutorials for the
onboarding and internal trainings**

**writing the texts (e-mails,
newsletters, blogs ...) with
particular tone of voice**

writing grant calls

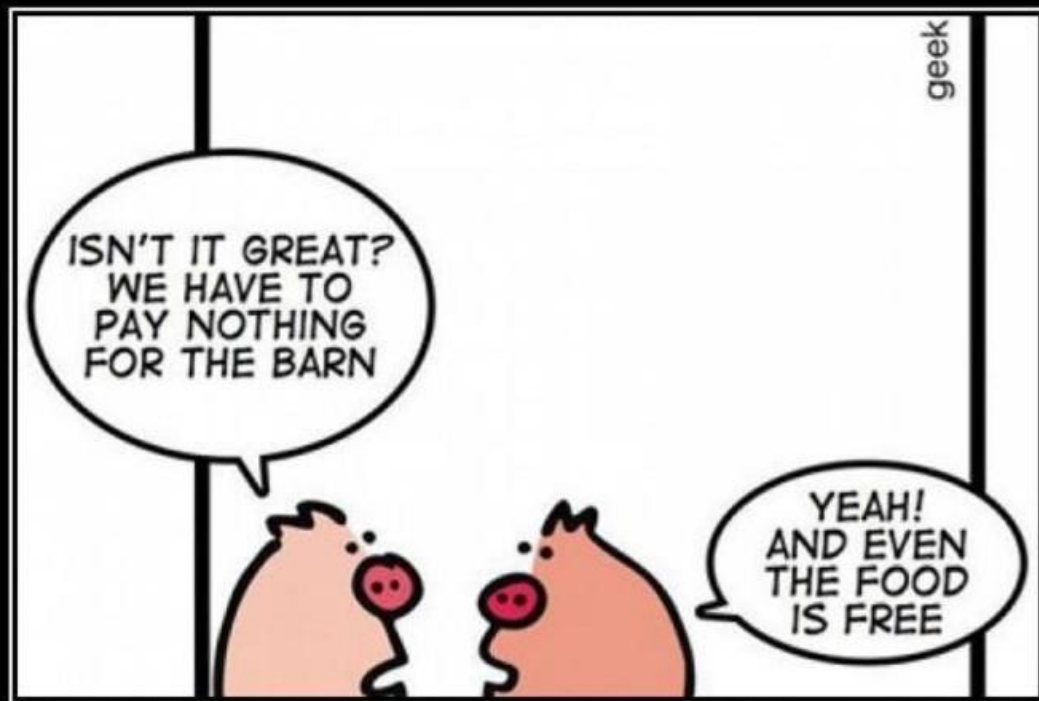
What can I use AI for?

What are the typical daily situations I need help with?

Which activities can I simplify using AI?

What Would Help to NGOs in the AI Adoption

- Implementation of AI to the CRM systems
- Automation of mundane tasks in the cloud systems
- Secure AI tools under the licence



FACEBOOK AND YOU

If you're not paying for it, you're not the customer. You're the product being sold.

Barriers and challenges in AI adoption

Budget Constraints

- Investing in secure AI tools and chatbots

Data Quality

- Ensuring clean, organized, and accurate data

Data Security

- Protecting sensitive information and maintaining privacy

How to Break Down Barriers

Opportunity for Fundraisers

- Raise funds to invest in secure AI tools and chatbots

Digital Audit

- Map the internal processes and make an order in it and in the data.

AI trainings and internal workshops

- Train the team in cybersecurity and safe use of AI tools.

How to successfully implement AI in an organization?

Prioritize Data Security

Ensures protection of sensitive information.

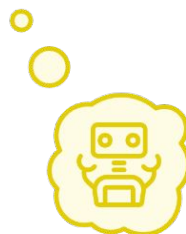


Plan AI Budget

Allocates resources effectively for AI initiatives.

Start with Low-Risk Projects

Minimizes potential failures while gaining experience.



Showcase AI's Potential

Attracts funding and support for AI initiatives.

Unlock New Dimensions in Fundraising with AI

- **Educate:** Empower your team with AI knowledge
- **Collaborate:** Combine human creativity with AI efficiency
- **Strategize:** Identify high-impact AI use cases
- **Secure:** Prioritize data protection and donor trust
- **Open the door and think out of the box:** AI is a challenge and a game-changer

**BE READY
FOR
THE CHANGE**

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