

TEAM WORKSHEET · PRINT OR FILL DIGITALLY

Fifteen days to **AI THAT ACTUALLY EARNS ITS SEAT**

Most AI pilots at nonprofits die the same way: someone opens a chat window, types a vague request, gets vague copy back, and quietly decides the whole thing is overhyped.

That isn't an AI problem. It's a context problem. A tool that knows nothing about your mission, your voice, or your Friday-afternoon workload will hand you something generic every single time.

This is fifteen sessions — mostly 10–15 minutes each, roughly four hours total, spread across three weeks. You teach the tool who you are, you eliminate one task you dread, and you make it stick for the person sitting next to you. No new software. No committee. Nothing from your donor records.

HOW TO RUN IT

- One session a day, weekdays only. Fifteen weekdays, three weeks.
- Use whichever AI tool your team already has. Don't shop.
- Check the box when a day is done. Blank boxes are the honest record.
- Day 10 needs 30–45 minutes — block it now.
- Two guardrails, always: AI does prep work, never donor conversations. And nothing from your donor database goes in — no exports, no giving histories.

BEFORE DAY 1 Write your name and start date here, and name the one teammate who's doing this with you. Solo pilots stall.

Name

Start date

Partner

DAYS 1–5

TEACH IT WHO YOU ARE

Nothing here produces a deliverable. You're closing the gap between what the tool assumes and what's actually true about your organization.

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- ☐ **01** **First real answer** 15 MIN
- Open the tool and ask for help with one actual thing from this week: a clunky appeal paragraph, three bullets that need to become a board update. Privately rate yourself 1–5 on how comfortable you are with AI. Keep the number.
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- ☐ **02** **See the gap** 10 MIN
- Ask it to write a thank-you letter to a donor who gave \$100. It'll be generic, because it doesn't know your mission, your voice, or your supporters. Write down what you wish it knew.
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- ☐ **03** **Write your profile** 15 MIN
- Half a page: your role, your mission in plain language, who your supporters are, how you like to be written for, and the tasks you do every week. Save it where the tool keeps standing instructions, or in a shared doc you paste at the top.
- Tip:** don't type it — talk it. Use voice dictation and just describe your job out loud for two minutes, then ask the tool to tidy it into a profile. Faster, and it sounds more like you.
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- ☐ **04** **Give it your voice** 15 MIN
- Add two or three things you've actually published — last year's appeal, a thank-you that got a reply, a paragraph from the impact report. Strip any names or gift amounts. Re-run Day 2's letter and compare.
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- ☐ **05** **Make something you keep** 15 MIN
- Ask it to build, not just answer: a one-page summary of your last board meeting, an event-day checklist, a plain-language program description for a grant. Bring it to your next check-in.
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DAYS 6-10

KILL ONE TASK

Pick the most repetitive thing on your plate and end it. By Friday it should take a fraction of the time it took last week.

☐ **06** **Name your target** 10 MIN

One recurring task you dread. Not the biggest, the most repetitive. Be specific: "the four acknowledgment letters I write every Friday," not "email." It has to be prep work, never a donor conversation.

☐ **07** **Hand it a job, not a question** 15 MIN

Something small with two or three steps. *Pull every decision and owner out of these meeting notes. Clean up this volunteer list. Tell me which of our programs fits this grant guideline.* You're always the reviewer.

☐ **08** **Give it your material** 15 MIN

Build a small reference folder: case for support, program descriptions, fiscal calendar, style notes. Upload it or keep it in one doc. Nothing from your donor records goes in – not an export, not a giving history. Follow this guardrail.

☐ **09** **Chain two steps** 15 MIN

Combine things you currently do separately. *"Read these event notes, pull out what worked, then draft the three bullets for the board packet."* One request, no copy-paste in the middle.

☐ **10** **Kill it** 30-45 MIN – BLOCK THIS ONE

No lesson. Build the workflow that replaces your Day 6 task, then write down: what it was, how long it used to take, how long it takes now, and how you did it. Rough estimates are fine.

The task	Before (min)	After (min)

DAYS 11-15

MAKE IT STICK

A workflow only one person can run is a hobby. This week it becomes something the team owns.

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- ☐ **11** **Teach one thing** 15 MIN
- One person records five minutes showing what they figured out. Screen recording, no slides. Rough is better – watching someone fumble teaches more than a clean demo.
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- ☐ **12** **Make it reusable** 15 MIN
- Write your Day 10 workflow down as a saved prompt or template. The test: could you run it in January without remembering how you built it?
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- ☐ **13** **Use it for real** 15 MIN
- Run it on live work. Note where it breaks, fix that. A second person records their five-minute lesson today.
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- ☐ **14** **Hand it off** 15 MIN
- Give it to a teammate and watch them run it without helping. Everything you have to explain out loud is what's missing from the written version. Add it.
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- ☐ **15** **Ship and look back** 30 MIN
- Finish one thing that didn't exist 15 days ago. Then privately re-rate yourself 1–5. Bring the distance between your two numbers to your next check-in.
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DAY 16

What you'll actually have

A written profile that makes every future answer sound like your organization instead of a press release.

One task off your plate for good, with the before-and-after numbers to prove it.

Two short recordings and one written workflow — the beginning of a team practice, not a personal trick.

Four hours bought you all of that. The teams that keep going don't do it by adding more tools; they repeat these three weeks on the next task they dread. Run it again in a month with a different person holding the pen.