

BEFORE WE MEET

# A 10-minute warm-up so the workshop works for *you*.

You don't need to prepare anything technical. Just answer these honestly. Whatever you write here becomes the raw material for the activities we'll do together. Bring this page with you on May 12.

## 01 Three things only you are holding

Name three things you're personally holding right now that nobody else in your organization could pick up tomorrow if you weren't there.

A.

B.

C.

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Circle the one that, if dropped, would actually cause real harm — not annoyance, harm.

## 02 One workflow you'd like to fix

Donor follow-up, board prep, hiring, scheduling, reporting, intake, something else. Pick one specific workflow.

### THE WORKFLOW

WHERE IT MOST OFTEN BREAKS (INTAKE / DECISION / FOLLOW-UP)

WHY THIS ONE MATTERS THIS SEASON

## 03 Your AI comfort, today

Be honest. There are no wrong answers, and the room will hold every level.

NOT AT ALL (1) (2) (3) (4) (5) USE IT DAILY

### TOOLS YOUR TEAM CURRENTLY USES (CHECK ANY)

- ☐ ChatGPT ☐ Claude ☐ Gemini / Copilot ☐ Otter / Fireflies (transcription) ☐ Salesforce / HubSpot / Bloomerang  
☐ Mailchimp / Constant Contact ☐ Asana / Trello / Monday ☐ Google Workspace ☐ Microsoft 365 ☐ Slack / Teams  
☐ None of the above

## 04 What would success on May 12 look like?

One sentence. If you walked out of this workshop and something specific had shifted, what would it be?

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