

CARRY THIS WITH YOU

The whole workshop, on *one* page.

If you remember nothing else, remember this. The map, the moves, the line for AI, and the rules that keep your people safe.

The Capacity Flow • 3 stages

1. **Intake.** Every request lands in one visible place — not in your head.
2. **Decision.** A real name. A real date. Written down.
3. **Follow-up.** Owner. Due. Confirmation back to the requester. Loop closes.

5 questions to map any workflow

1. Where does it **enter**?
2. Who **sorts** it first?
3. Who **decides**, by when?
4. Where is it **written**?
5. How does it **close**?

4 AI workflows you can start this week

1. **Follow-up tracker.** Surface "I'll get back to you" promises in a weekly digest.
2. **Meeting prep.** Brief before. Recap after. Commitments captured.
3. **Email drafting.** First drafts in your voice. You always send.
4. **Donor acknowledgment.** Personalized draft from gift history. ED edits, sends < 48h.

4 rules that keep this responsible

1. **A human always sends.** No external message leaves without a person reading it.
2. **Personal data only in vetted tools.** Donor records, client cases, HR.
3. **Disclose where it matters.** A one-line policy ahead of the funder question.
4. **Fewer tools, integrated well.** One CRM, one calendar, one inbox, one doc system.

The line • where AI helps vs. where humans stay

YES • AI AS INFRASTRUCTURE

- Drafts, summaries, reminders
- Surfacing stuck threads & commitments
- Pulling history into a meeting brief
- Flagging complexity for a human to handle

NO • KEEP HUMANS HERE

- Final words to donors, funders, partners
- Responses to clients, survivors, vulnerable communities
- Submitting impact numbers without reconciliation
- Auto-sent program decisions

"The mission should not depend on one person remembering everything. It should rest on *infrastructure that holds*, even on the hard weeks."

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ONE SHEET • HARD WEEKS & SOFT ONES