Digital Fundraising Summit 2024 - online conference 07 November 2024

🔶9.35am -10.10am - **KeyNote Session** - **AI Readiness : Practical steps for your nonprofit's AI strategy,** Patrick Frank, AI and Data Expert - Marketing Cloud Leader for Nonprofits at Salesforce

This expert-led AI Readiness session will offer nonprofits a structured approach to assess their AI readiness and implement a strategy aligned with their mission. Designed to support organisations at every level of AI experience, the session includes foundational concepts, practical tips and advice based on where you are on your AI journey, and actionable steps to create an impactful AI approach.

AI readiness
Practical steps for your nonprofit's AI strategy

Patrick Frank
Director Marketing Cloud for Nonprofits
Salesforce

Forward looking statements

This presentation contains forward-looking statements about, among other things, trend analyses and statements regarding future events, anticipated growth and industry prospects, and our strategies, expectation or plans regarding product releases and enhancements. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, results or outcomes could differ materially from those expressed or implied by these forward-looking statements. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to: our ability to meet the expectations of our customers; uncertainties regarding AI technologies and its integration into our product offerings; the effect of evolving domestic and foreign government regulations; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including related to AI and Agentforce; our ability to execute our business plans; the pace of change and innovation in enterprise cloud computing services; and our ability to maintain and enhance our brands.

Last updated: September 10, 2024

Thank you

Change and evolution are inevitable

Wave 1

Predictive

How to |

- How to **increase conversions**
- How to **optimize spend**
- How to **personalize experiences**
- How to **grow relationships**

Wave 2

Generative

Wave 3

Autonomous & Agents

Hey Einstein, can you update this order & notify this customer?

Sure thing! ✅

Wave 4

Artificial General Intelligence

Staff are overwhelmed

Low value tasks

Stalled productivity

Fixed capacity

41%

of time is lost to low value & repetitive tasks

#1 Nonprofit Challenge is Managing Workload and Staff Wellbeing

Stakeholders expect more

Zero hold queues

Personal experiences

Empathetic conversations

So… What is AI Readiness?

AI Readiness refers to an organization's preparedness + capacity to adopt AI technologies in it's operations.

AI Is Here: Nonprofits are Curious and Cautious

AI Sentiment in Nonprofit Sector

44% *of respondents* concerned about data security

31% *of respondents* worry about accuracy

AI is only as good as your DATA

Having a strong data foundation:

- ⬇ trapped and siloed data
- ⬆ data quality and hygiene
- ⬇ hallucinations
- ⬆ data privacy

Source Nonprofit Trends Report 6th Edition

Is your Nonprofit AI Ready?

Are YOU AI Ready?

What's your Responsible AI *Comfort Level?*

Tourist	Sightseer	Local Guide	City Planner	Mayor
I am just visiting. I am unfamiliar with the streets and landmarks and need a guide to get around.	I have seen some of the main attractions. I recognize a few landmarks but still rely on maps and guides to navigate.	I can navigate many areas confidently and have a good understanding of the city's layout.	I can show visitors around, explain the history and significance of landmarks, and navigate most areas with ease.	I am a recognized authority on all matters

AI Readiness Framework

Mapping AI to your Nonprofit Organisation

Let’s focus our expectations

Organizations must adapt, and FAST to automate and augment tasks

AUTOMATE

Faster

EFFICIENCY

Cut Costs

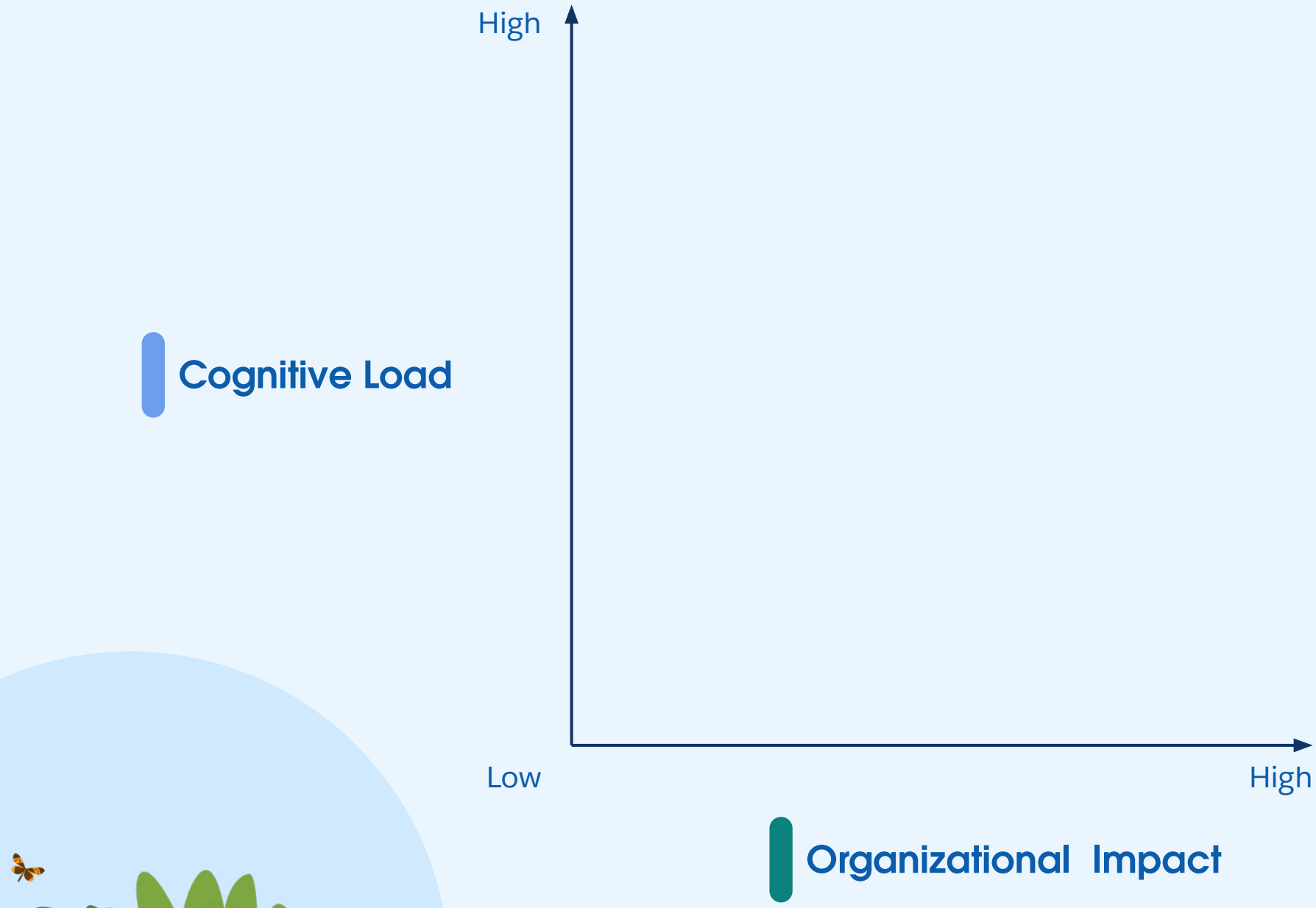
AUGMENT

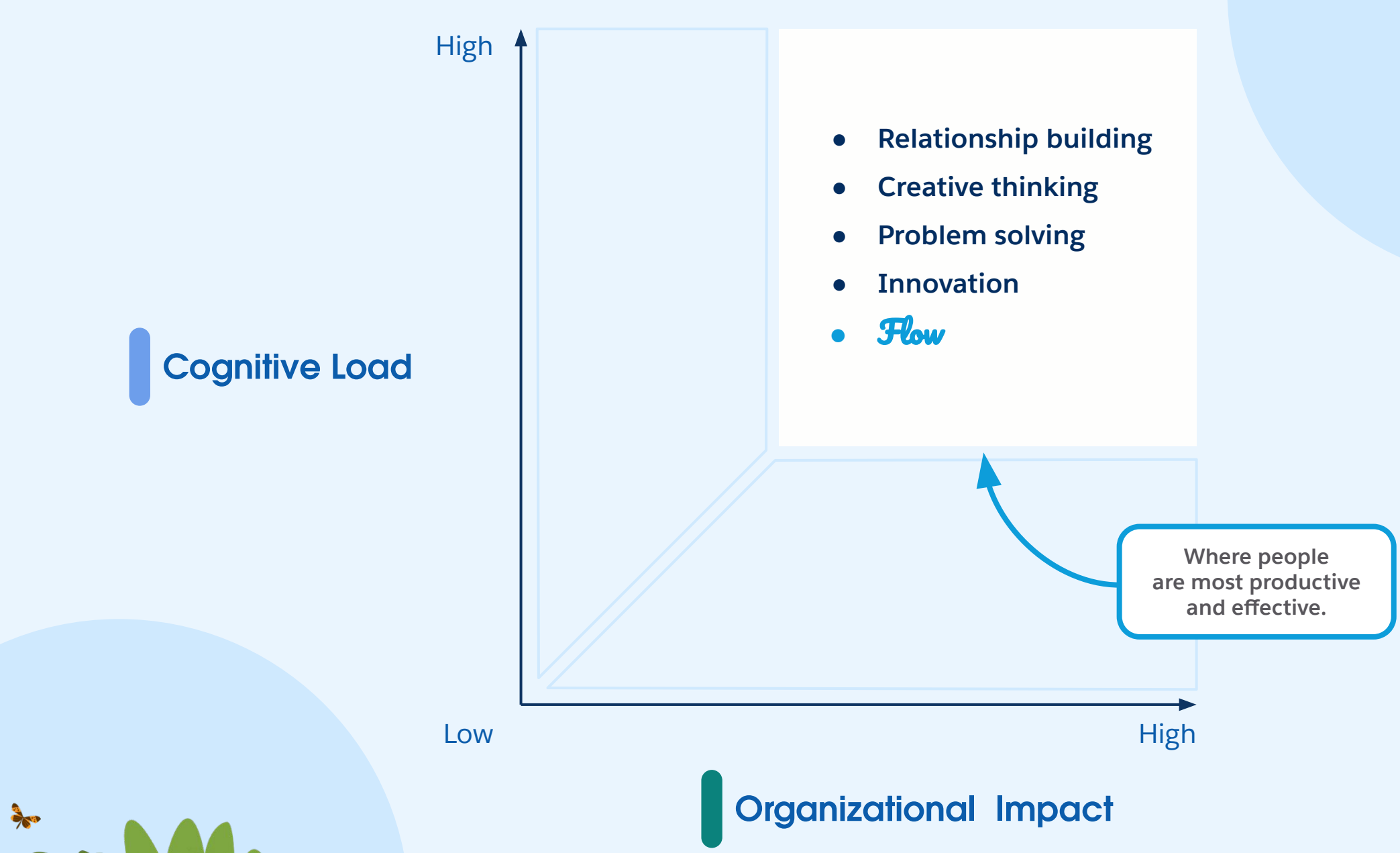
Smarter

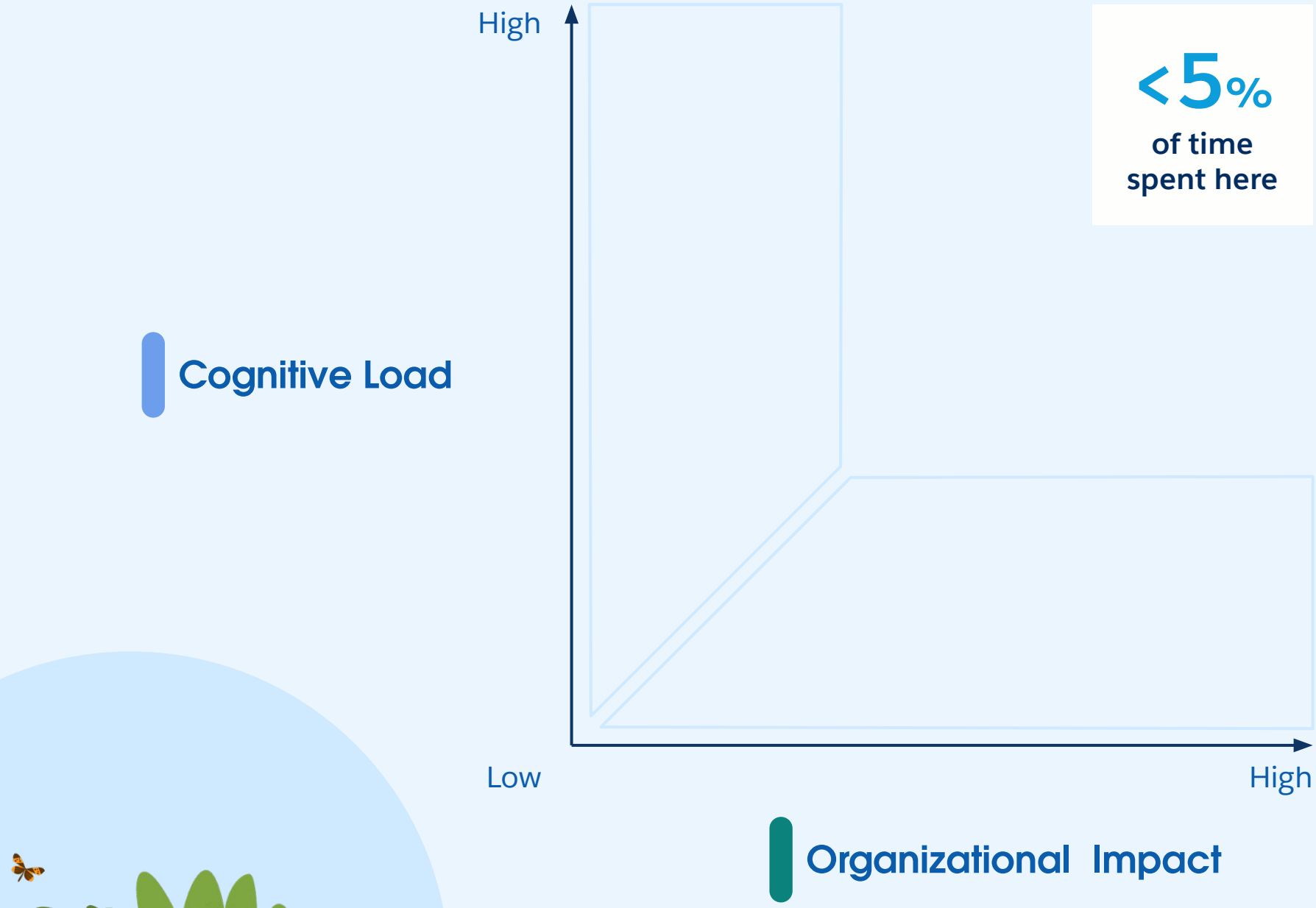
PRODUCTIVITY

Free Your Team

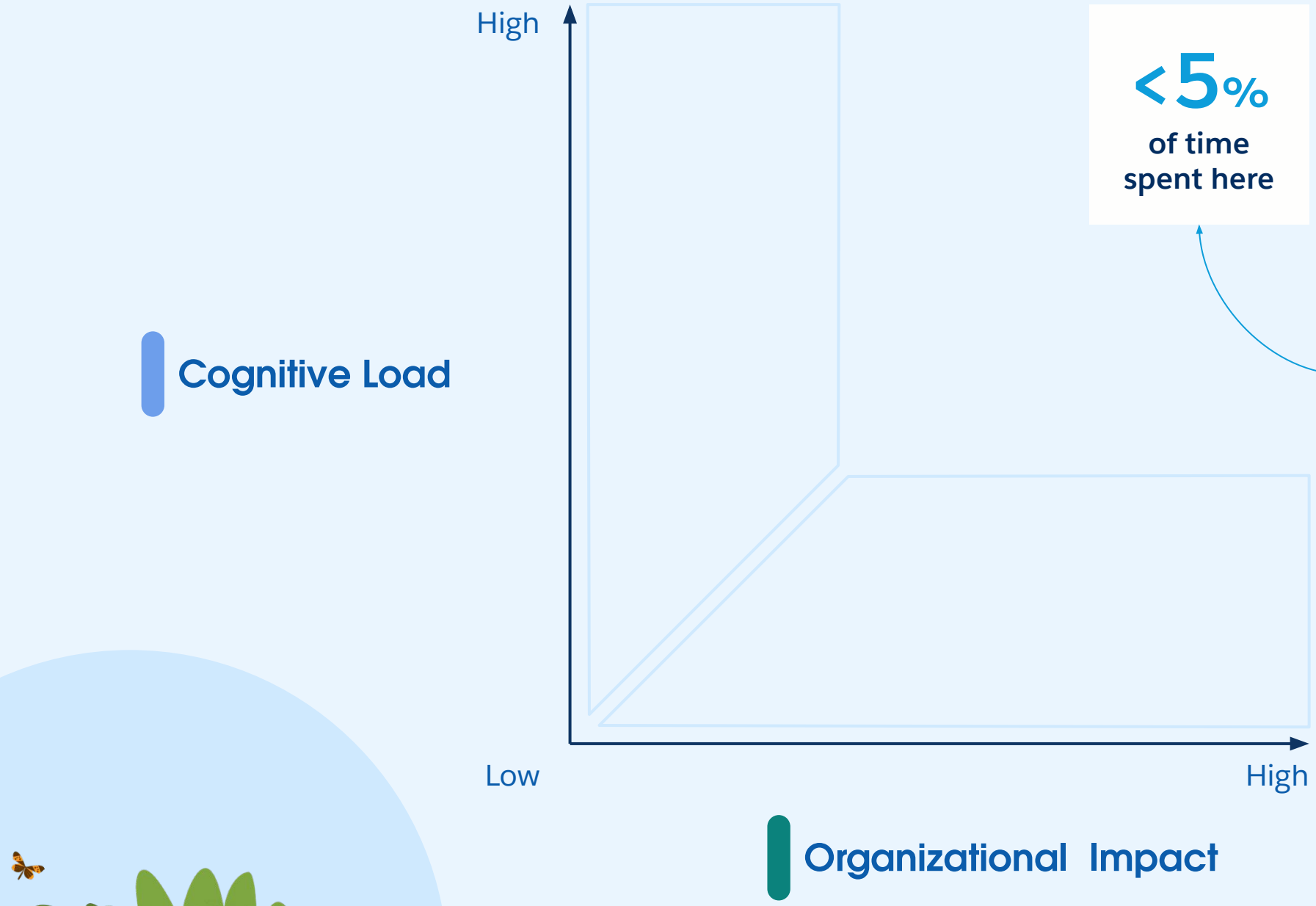
Improve Outcomes


High
Low
High
Cognitive Load
Organizational Impact


High
Relationship building
Creative thinking
Problem solving
Innovation
Flow
Where people are most productive and effective.
Low
High
Cognitive Load
Organizational Impact



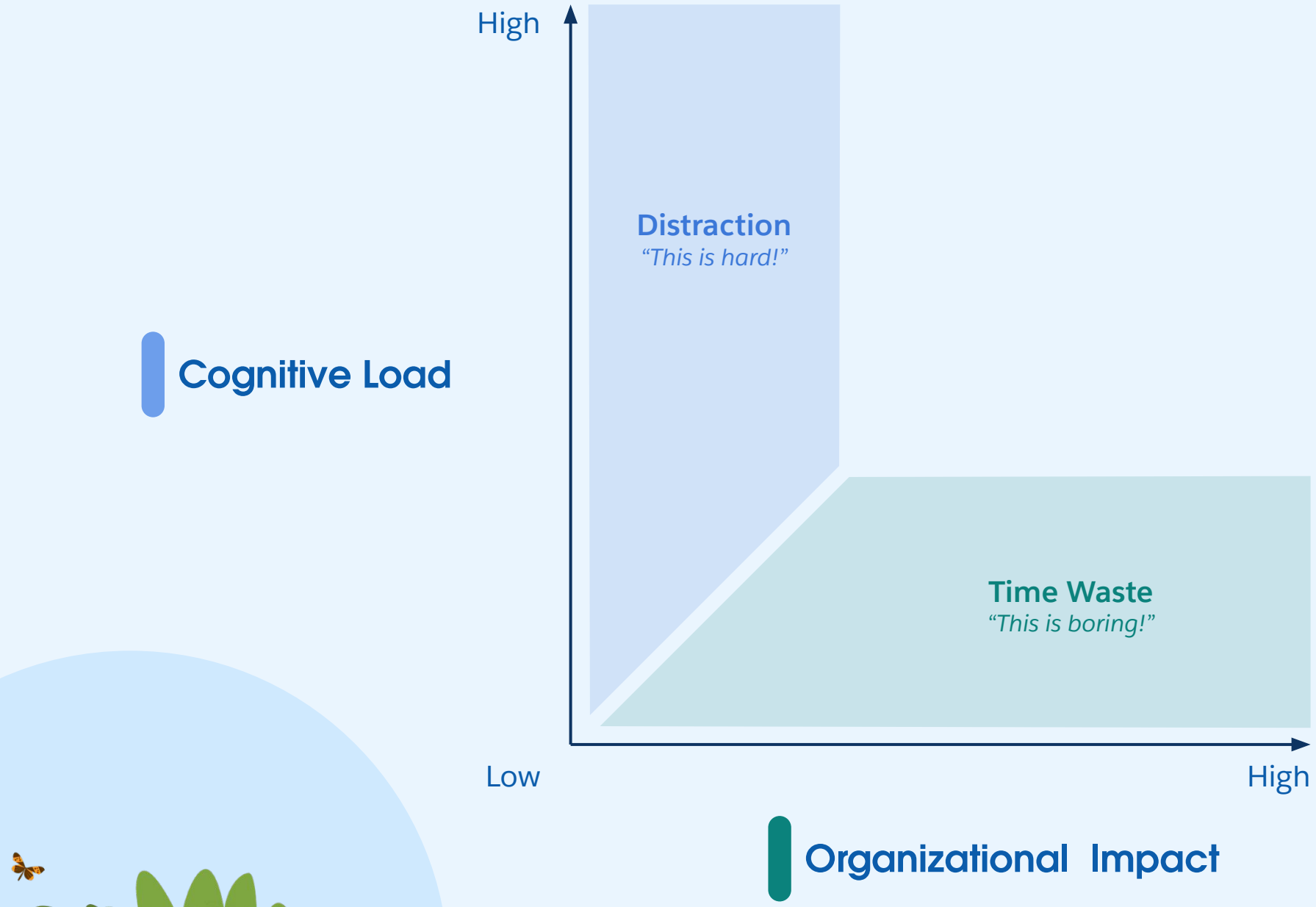
<5%
of time spent here

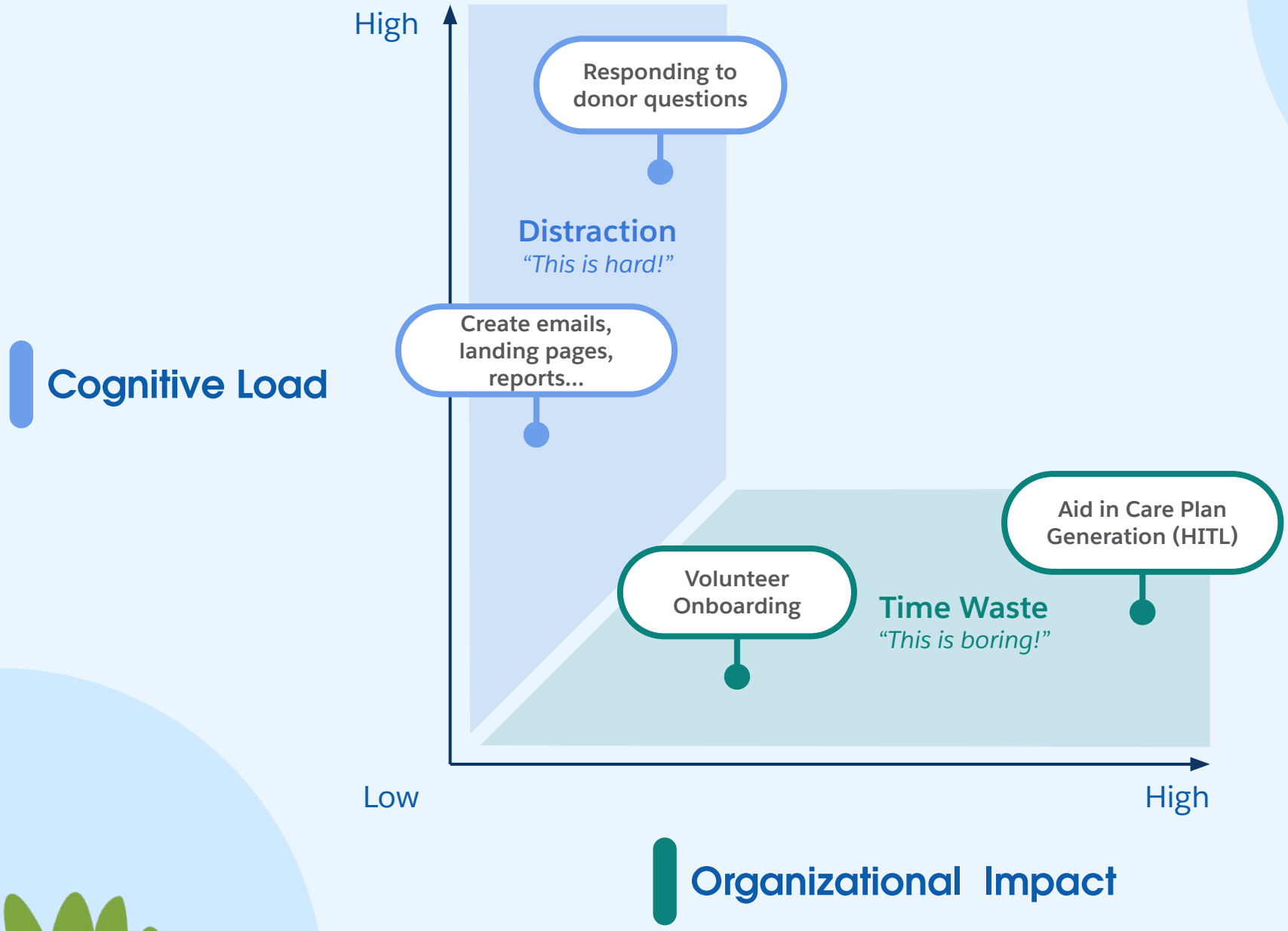


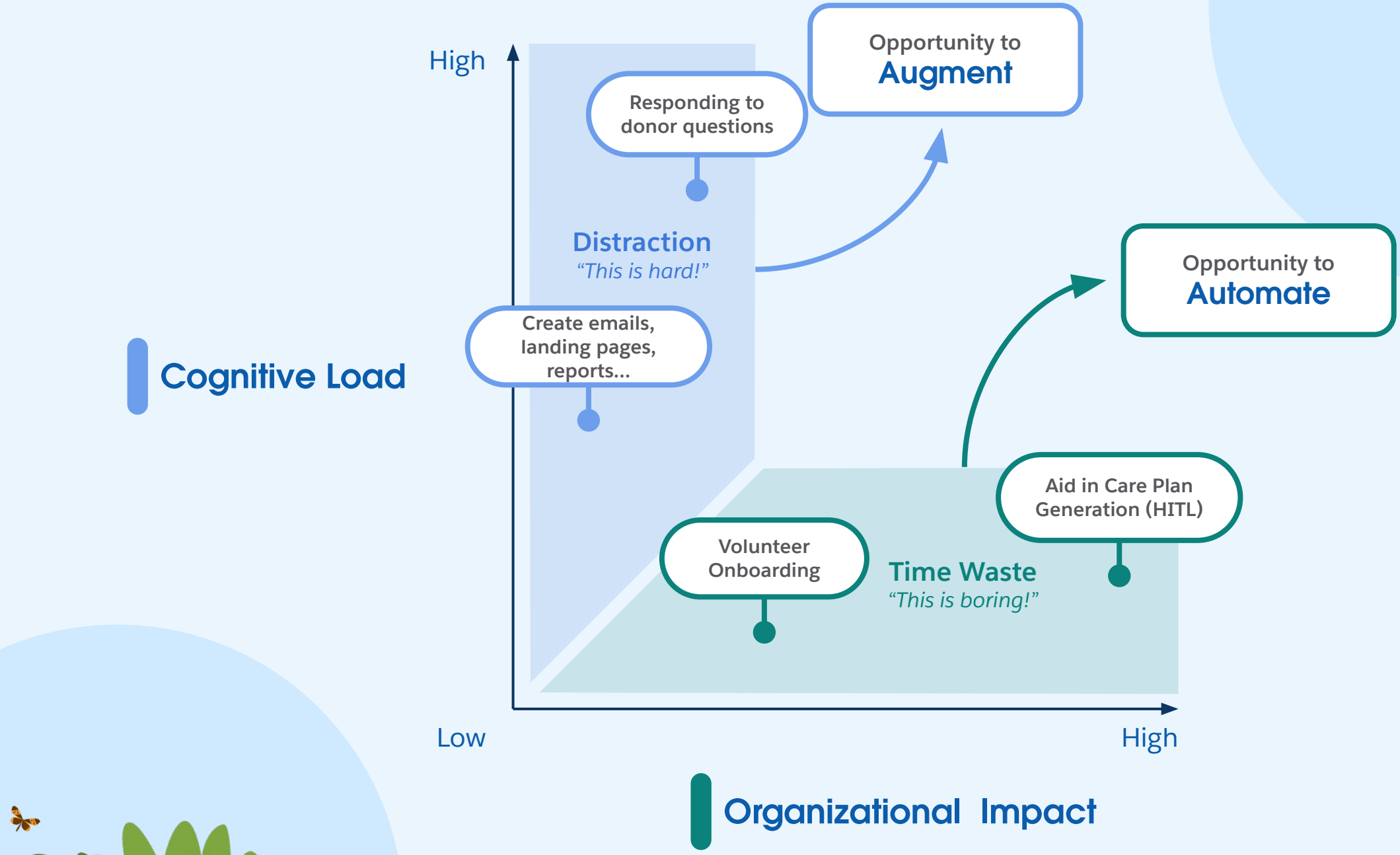
<5%
of time spent here

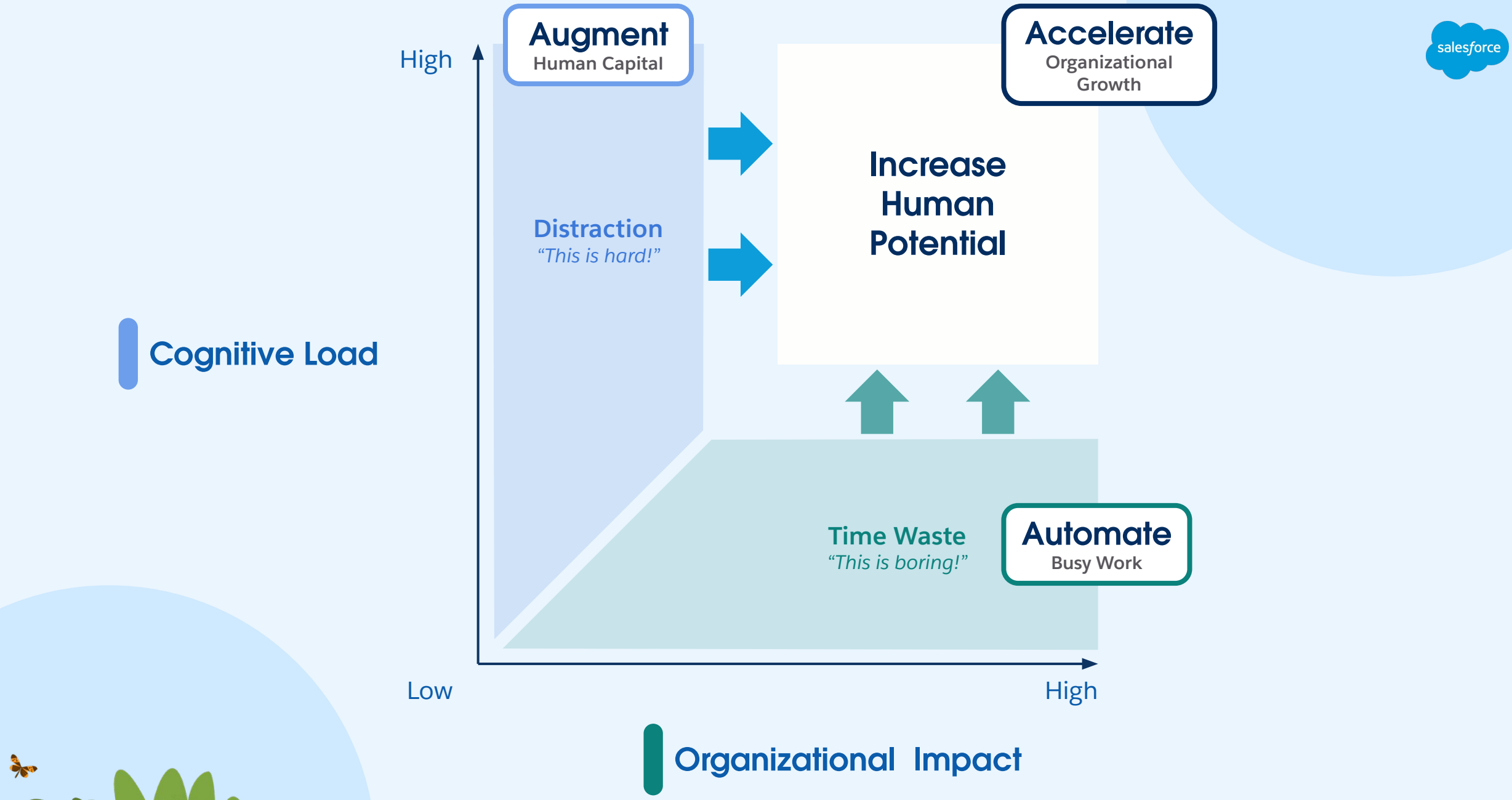
Most of us spend less than 5% of work life at our peak flow. Workplace productivity would almost double if that was bumped to 20%.

- McKinsey, Increasing MQ


High
Distraction
"This is hard!"
Time Waste
"This is boring!"
Low
High
Cognitive Load
Organizational Impact


High
Responding to donor questions
Distraction
"This is hard!"
Create emails, landing pages, reports...
Cognitive Load
Aid in Care Plan Generation (HITL)
Volunteer Onboarding
Time Waste
"This is boring!"
Low
High
Organizational Impact


High
Low
High
Cognitive Load
Organizational Impact
Opportunity to
Augment
Responding to
donor questions
Distraction
"This is hard!"
Create emails,
landing pages,
reports...
Opportunity to
Automate
Aid in Care Plan
Generation (HITL)
Volunteer
Onboarding
Time Waste
"This is boring!"


Augment
Human Capital
Accelerate
Organizational Growth
High
Distraction
"This is hard!"
Increase Human Potential
Cognitive Load
Time Waste
"This is boring!"
Automate
Busy Work
Low
High
Organizational Impact

5 Strategic Steps to Success

1. **Establish Your Vision & Strategy**

Define clear vision, objectives and use cases:

2. **Align Stakeholders**

Secure agreement and commitment across your executives:

3. **Assess & Prepare Your Data**

Prepare data and build expertise:

4. **Integrate AI with Business Strategy**

Develop and implement AI Solutions:

5. **Scale with RAI: Governance and Ethics**

Monitor, measure, and scale AI initiatives

What can I expect in the future?

We are in wave 3

Wave 1

Predictive

How to |

- How to **increase conversions**
- How to **optimize spend**
- How to **personalize experiences**
- How to **grow relationships**

Wave 2

Generative

Wave 3

Autonomous & Agents

Hey Einstein, can you update this order & notify this customer?

Sure thing! ✅

Wave 4

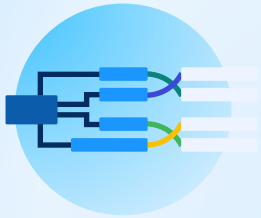
Artificial General Intelligence

Responding to Disaster with Good360 & Agentforce

Agents don’t just assist.
They take action.

Chat bots

Fixed rules & repetitive tasks



Copilots

Smart, tailored assistance

Hey Einstein, can you tell me about this order?

The tracking number is GH789AKM and it will arrive by 9/18

Agentforce

Knows your organisation

Plans & reasons

Takes action

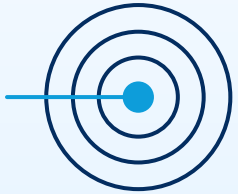
Scales

How can I not lose the human touch at the same time?

Every Nonprofits Needs a Responsible AI Strategy with a *Human at the Helm*.

Guidelines for Responsible GAI

Adapted from our published internal guidelines for Responsible Generative AI



Accurate

Have quality in your grounding material.

Convey uncertainty when the answer isn't clear.

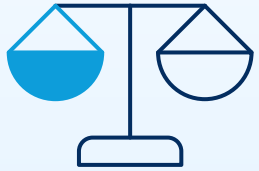
Enable fact-checking when possible.

Safe

Mitigate bias, toxicity, and harmful content.

Protect PII and prevent data leakage.

Guard against nefarious use.



Honest

Respect data provenance and attribution where possible.

Make clear that content is AI-produced when delivered.

Align use of AI to your company's values.

Empowering

Recognize & supercharge human capabilities.

Make accessible to all.

Engage in responsible labor practices.

Sustainable

Right-size models to reduce carbon and water footprint.

Balance value of applying high-power queries to expected benefit/gains.

Include IEEE metrics for responsible AI

…*to* PRACTICE: Organisation Requirements

From Principles to Practice: Responsible GenAI principles should be broken down to provide specific guidance for teams when building.

	Accurate	Safe	Honest	Empowering	Sustainable
People	Always provide min. 2 citations in customer facing content; Always show confidence score of generated content to employees/internal users	Always show toxicity score to employees/ internal users; Never display any results with toxicity score >65%;	Always train workers in genAI company policy details; Always provide on-screen guidance and customer disclosure statements for employees to use when genAI is a conversation participant	Always put the majority of accountability for the outcomes of a task with people, not machines; Always implement AI assistance that makes employees more knowledgeable	Create in-app guidance for users to understand the environmental impact of their genAI interactions Let users choose opt-outs where there is no impact of not using genAI feature

*Requirements demonstrative of applicable rules for AI use cases based on ethical principles

salesforce
SIXTH EDITION
Nonprofit Trends Report
How nonprofits around the world are embracing change, overcoming challenges, and harnessing opportunities
Donation Dashboard
Average Donation per Year

salesforce
Nonprofit AI Readiness Workbook
Help Your Organization Prepare for AI

Thank you