B4A DATA & AI STUDIO
DECISION INTELLIGENCE

PNP-06 · FUNDRAISING · DEVELOPMENT TEAMS

THE AI COMPANION KIT FOR FUNDRAISING TEAMS

The Decision Desk.

Who do we contact this week, and what do we say? Your CRM holds the data. Decision Desk turns it into a 20-minute Monday routine: this week's priorities, drafts ready to send, and a one-page update for the board.

20 min
one routine, once a week

3
things on your desk every Monday

2
draft versions for every message

0
messages sent by the agent

WHAT YOU GET

This week's priorities. Who to contact, in order, with one line on why now.

Drafts ready to send. Two versions for each person. You edit, you send.

Reports for the board. A one-page update from bands and counts, never exact gifts.

Works with what you have. Raiser's Edge NXT or Salesforce, with Microsoft Copilot or Claude. Start by export and upload; connect the CRM directly later. Check your own plan for what is included.

Safe by design. A person approves every message, the agent never writes to your CRM, and no addresses or personal emails are uploaded.

HOW IT WORKS

01
Send a note. The decision you face and the data you hold.

02
A 30-minute call. Frame the question, agree the scope.

03
One Monday. Bring one CRM export and see your first week.

THE MONDAY ROUTINE

Twenty minutes, start to sent

2 min Export from the CRM	**1 min** Upload to the agent	**2 min** Ask what to do
5 min Ask for drafts	**8 min** Read, edit, send	**2 min** Log it in the CRM

The agent drafts. A person always sends.

ILLUSTRATIVE, FICTIONAL DATA · YOUR VERSION IS BUILT FROM YOUR RECORDS

B4A DATA & AI STUDIO BUILD4ABUNDANCE.COM

Book a 30-minute discovery call

PRICING ON REQUEST · FIXED FEE, AGREED BEFORE WORK BEGINS
CONTACT@BUILD4ABUNDANCE.COM

WHO IT IS FOR

Fundraising and development teams on Raiser's Edge NXT or Salesforce, using Microsoft Copilot or Claude.

Start with one team and one week.
Bring one CRM export and see your first Monday. **Twenty minutes later, the drafts are on your desk.**

Data → AI explores → **Humans decide.**

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How your data becomes a decision.

You hand over simple exports, nothing more. AI does in hours what would take an analyst weeks: scanning every record, pattern and comparison at once. People then check what matters against the source, and you receive a clear recommendation, not a pile of tables.

Step 01
What we collect
A weekly CRM export: names, giving bands and contact history. No addresses or personal emails, and giving shown as bands, never exact gifts.

Step 02
AI explores at scale
The agent reads the export at once: who to contact, in what order and why now, with two draft versions for every message. Minutes, not mornings.

Step 03
People decide what is true
Every figure that matters is traced back to your records. A person reviews the findings and writes down what the data cannot tell you.

Step 04
You decide with confidence
Your team reads, edits and sends in one 20-minute sitting, logs it in the CRM, and the board gets its one-page update.

Data becomes information, information becomes knowledge, and knowledge becomes a decision. AI does the sorting at a speed and scale no team can match. People decide what the numbers mean. That split is fixed, and it is why you can trust the result.

Your data stays yours.

No identifiable data leaves your systems. We work from aggregated exports: groups, segments and totals, never individual donors or clients.

Never used to train AI models. Your data is used for your project only, inside tools with training switched off.

Agreed before anything moves. What data is shared, where it is held and who sees it is written down before work begins.

Deleted when you ask. Working copies are removed at the end of the engagement, on request, with confirmation.

Why it matters: the people you serve trusted you with their information. Our method is built so that trust is never put at risk, and your privacy officer can verify every step.

Ethical AI, in writing.

People stay accountable. A named person signs off before anything reaches you or your board.

Numbers come from sources, never from the model. AI explores and compares; it never supplies a figure of its own.

We say where AI was used. In plain words, in every report, and on request at any time.

We say what the data cannot show. Every analysis carries its limits. An average is not anyone's odds.

No harm. No invented numbers or people, and stories about people are told with dignity.

Part of something bigger. The Decision Desk is the weekly rhythm of your Decision Layer: the always-current picture of your organization that the largest enterprises are now building. Start with one team and one Monday. Everything you build here is reused in the next decision.

Book a 30-minute discovery call: calendly.com/j-habib01/30min
contact@build4abundance.com

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