

Beyond the Basics: Harnessing AI For

Your Nonprofit's Success

Publication Date: July 10, 2024

© Armanino LLP. All Rights Reserved | **Possible (Re)** Defined



Today's Presenters



Brenda Kahler

Senior Director Industry Strategy



Lauren Renninger

Senior Manager Business Analytics & Automation



Requirements to Qualify for CPE





STAY ON

To qualify for the maximum CPE credit participants must stay on for 50 minutes and respond to 3 out of 4 polling questions.

FOR QUESTIONS

If you have technical difficulties responding to the polls, please send an email to:

- ElevateLearn@armaninoLLP.c om
- Please include the name/date of your session along with your poll response
- Any questions or comments for the faculty? Submit via chat



Course covers Course Overview

- Explore how AI can open the door to greater efficiency and efficacy for your nonprofit.
- Discover practical ways to automate tasks, analyze data for better decision-making.
- Illustrate demos of automation tools at work and case studies for practical AI implementation for day-to-day usage



After this course, you will be able to Learning Objectives



Discover tips for strategic implementation and incorporating Al across your organization.



Review ethical considerations and guidelines for using Al responsibly.



Determine futureproofing strategies and advice on staying ahead with AI advancements.

CPE INFORMATION Program Level: Basic Field of Study: Information Technology Technical Delivery Method: Group Internet Based Recommended CPE: 1.0 Audience: All Program Prerequisite: None Advanced Preparation: None



Armanino.com

	oring new areas senda
***	AI and nonprofit adoption of new technologies
÷	Key do's and don'ts for utilizing generative AI
血	Demos and use cases
	What now? What next?

© Armanino LLP. All Rights Reserved | **Possible (Re)**Defined



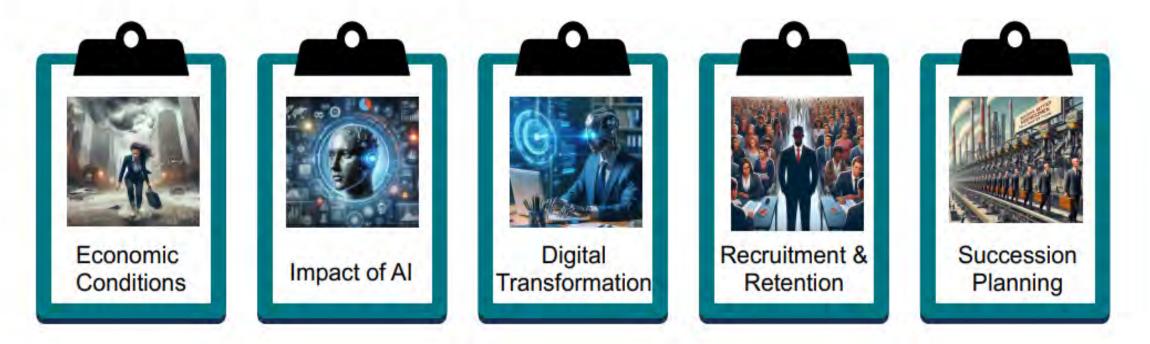
9



armaning.com



what trends are common across multiple industries? Common Trends



Industry Commonalities



Торіс	Tech: SAAS	Tech: Life Sciences	Real Estate	Nonprofit	Healthcare	MDW	Private Equity	Family Office	Prof. Services
Talent		0	0	0		0			0
Impact of Artificial Intelligence (AI)			0	\bigcirc		0	0		0
Digital Transformation		0		0	0	0	0	0	
Financial Pressure						0			
Workforce Disruption				0	0	0			
Competitive Threats									
Giving Crisis/Donor Donations				0	1.0				
Debt Markets									
Valuation		0					0		
Fundraising							0		
Shifting Sales Models	0			0					
Required Profits	\bigcirc				100				
Economic Uncertainty		0	0	0	0	0	0		0
Ease of Access to Providers									
Return on Investment				0		0		0	
Production Costs						0			
Supply Chain		9				0			



AI Insights From Our Clients

Where do you believe AI could help you improve most?

Reporting & Data Analytics (65%)

Admin Tasks (60%)

Armanino.com 14



AI Insights From Our Clients

Current Use of AI and Obstacles

No, but considering it. (42%)

Not currently using due to lack of knowledge or expertise. (74%)



You're not alone

90% of professionals are excited to embrace AI

49% of professionals globally are worried they should know more about AI than they do

39% of global professionals have admitted to pretending they know more about AI to seem 'in the know' in front of teammates



Per 9/14/23 LinkedIn study



Artificial Intelligence Usage

Artificial Intelligence Usage is on the Rise





of companies are using Al and 42% plan to explore future implementation¹ Growth in customer satisfaction for organization that use Al²



of non-profits believe using AI will make their advancement teams more efficient³

Gartner Al Maturity Model

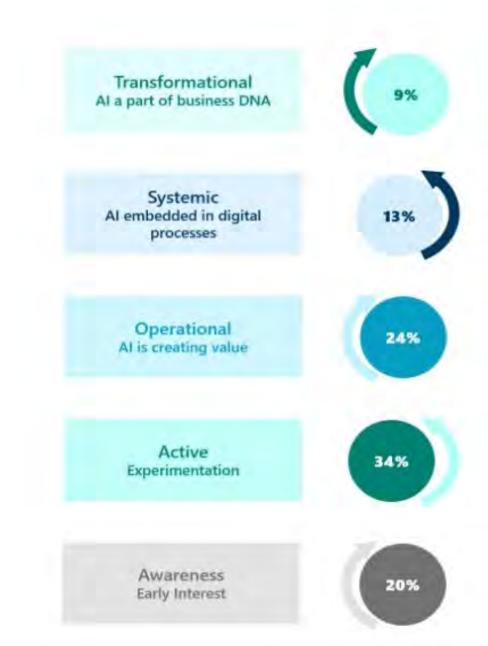
AI Maturity Model

Level 1 Awareness	Level 2 Active	Level 3 Operational	Level 4 Systemic	Level 5 Transformational
	Al experimentation, mostly in a data science context	Al in production, creating value by e.g., process optimization or product/service innovations	Al is pervasively used for digital process and chain transformation, and disruptive new digital business models	Al is part of business DNA
Early Al interest with risk of overhyping	/			

gartner.com/SmarterWithGartner

Source Gartner @ 2019 Gortner, Inc. Allinghts reserved









Using AI can lead to changes in the job market.

While it might replace some jobs, particularly repetitive or manual tasks, it can also create new jobs and enhance others, especially those requiring human judgment, creativity, or complex interaction.

It's about adapting and finding new opportunities where AI can assist rather than replace human roles.

Machine Learning

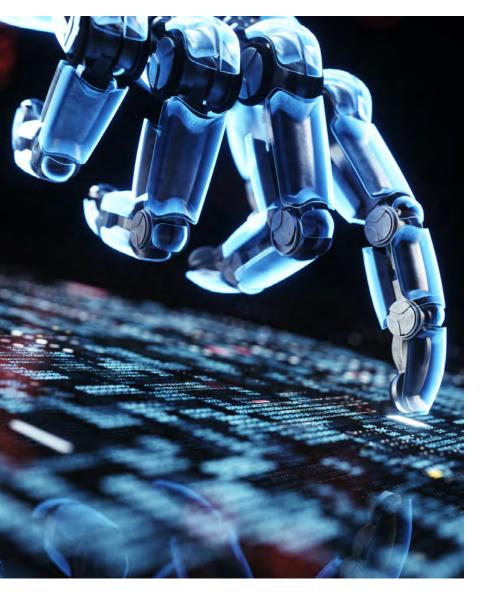
Se let

Deep Learning

Generative AI

What is Artificial Intelligence?





What does AI consist of?

Computer Vision:	 AI powers systems that can automatically detect and classify objects in images and videos.
Natural Language Process:	 AI enables systems to understand, interpret, and generate human languages.
Robotics:	 AI provides robots with sensing, reasoning, learning, and self-correction capabilities.
Machine Learning:	 Allows systems to learn and improve from data without being explicitly programmed.
Rule-Based Intelligence:	 AI that follows a predetermined set of rules best used when the rules are straightforward and easy to define.
Robotic Process Automation:	 AI "bots" that can be programmed to complete manual and repetitive work.





Armanino.com

Machine Learning		RPA	
Deep Learning			
Generative AI			





Nonprofit Use Cases

Donor Management

Maintain accurate, real-time donor data and contact information by automated data entry and updates

Systems Integration Reporting & Data Analysis Eliminate manual data entry and maintain Automate repetitive and time-consuming data analysis, accurate information across systems reconciliations, and report generation **Accounts Payable** Human Resources Ξ... Free up your HR team by automating employee Scale your AP team with automated invoice processing, validation, and vendor management onboarding, termination, and benefits management Accounts Receivable Tax & Compliance Reduce time and errors in order processing, Utilize bots to prepare and file forms such as donor fulfillment, invoicing and cash allocation acknowledgement letters and annual state filings Volunteer Management & Onboarding Achieve new levels of efficiency onboarding volunteers,

Development Marketing & Communications

Save time and money utilizing bots to build curated donor campaigns, create content, and send tailored communications

© Armanino LLP. All Rights Reserved | **Possible (Re)**Defined

collecting contact information, and distributing pertinent

news, opportunities, and event information



ustome y Armanin	er Intellige No Al Lab	ence		Home	Overview	Plan	A	d Abo	tuo				arr	manin	o	
Salespe	rson	-	Industry			ocation	*		171 Customers	131	.35 Transactions per Cu		\$3.567.2	56 per Custome		
Al			Al		~ *	4		PH I		17	name of its prives		arg. in terms	per contoine		
Free	quency less that transact		116 transactions	230 transact	more th transact				4.10 Avg Life (Years)	3	SETTIN			90A		
Recency less than 5 days ago	New Customer 13% of Customers \$70,359,246 Revenue Predict					Dampion 4% d Cartonars \$115,313,13 Recence Pred	ction (3 Haji	Revenue	Potentials by	Currer y Customer Se	nt Revenue ® Rever	ue Prediction () In	÷			
since last transactions					Loyal C	ustomers		0	spend t	recently, buy often a he most	nđ	£291M		\$120M B		
	Premising				\$26.16	197 Fredicion () To		item Co	often	more recently but no	^а \$70м		\$20,126K	\$70,369		
17 days app	of Cestomers			1606- ter Const				(strope	Loyalian Recent of amount	outtomers, spent goo , bought more than o	d SIZM		\$66,917K	\$36,727		
less than	About to Sleep			12617	e Prediction (2 yrs)			Leye D	Spend g to prom	pood money, respons actions	we \$72M		\$73,1156	\$33,969		
727 days ago	24% of Castomers 56.235,777			6% of Cash \$3,915	.661			P	Recent r	shoppers but havent uch			\$23,481K	\$16,153		
	Revenue Product	taeld whe			e Prediction () (re)			Alext		verage recency, frequ	ancy		\$13,296K	\$6,356		
	CI	ustomer	Intelligen	ce		Home	Overvie	nu Plar		AD AD	iout					armani
	Lost by	Armanino	Al Lab						-							aman
727 days age	Lost by	Armanino Salesperso			Industry		.v	Location	u.		171		31.35			3.567.256
727	Lost			*	Industry All				-					ions per Cust		3.567.256
727	Lost	Salesperso		2 S 2				Location	v	♣	171 # Customers 4.10		g. Transacti 610,000	719	C③ Av	3.567,256 g. Revenue per Custi 295,935,844
727	Lost	Salesperso All		¢ 1 5 2	All			Location	v	♣	171 # Customers		g. Transacti	719	C③ Av	3.567,256 g. Revenue per Custi 295,935,844
727	Lost	Salesperso All Segment		× 5 × 5	All Customer	# Customer (Likely)		Location	v	♣	171 # Customers 4.10		g. Transacti 610,000	719	C③ Av	3,567,256 g. Revenue per Cust 295,935,844 venue Prediction (3 Revenue
727	Lost	Salesperso All Segment	n Segment	5 2 5 5	All Customer All		× 5	Location M	Transactions	Avg. Revenue	171 # Customers 4.10 Avg. Life (Years) Avg. Revenue	Days since last	g. Transacti 610,000 arrent Reven Avg Life	719 Nue Purchase	Avernue	3,567,256 g. Revenue per Cust 295,935,844 venue Prediction (3 Revenue
727	Lost	Salesperso All Segment All	in Segment	5 5 5 5	All Customer All # Customers	(Likely)	× 5	Location All Current Revenue	Transactions	Ang. Revenue per Customer	171 # Customers 4.10 Avg. Life (Years) Avg. Revenue	Av Av Av S Ca Days since last Transaction	g. Transacti 610,000 ment Reven Avg Life (Years)	719 Nue Purchase	Revenue Prediction (1 Yr)	3,567,256 g. Revenue per Cust 295,935,844 venue Prediction (3' Revenue Prediction (3 Yrs)
727	Lost	Salesperso All Segment All	segment Segment sistemers	5 5 5 5	All Customer All # Customers 7	(Likely) 7	× 5	Location All Current Revenue 5290.948.187	Transactions	Ang. Revenue per Customer S41.564.027	171 # Customers 4.10 Avg. Life (Years) Avg. Revenue	As As As Ca Days since last Transaction 2	g. Transacti 610,000 mrent Reven Avg Life (Years) 5,44	719 Nue Purchase	Revenue Prediction (1 Yr) S48,772,984	3.567,256 9. Revenue per Custo 295,935,844 Venue Prediction (3 Yrs) Revenue Prediction (3 Yrs) 5128,444,360
727	Lost	Salesperso All Segment All • • • • • • • • • • • • • • • • • •	Segment Sistemers A Loyalists	2 2 2 2 V	All Customer All # Customers 7 12	(Likely) 7 12	× 5	Location	Transactions	Ang. Revenue per Customer 541.564.027 56.092.892	171 # Customers 4.10 Avg. Life (Years) Avg. Revenue	Days since last Transaction 2 2	g. Transacti 610,000 arrent Reven Avg Life (Years) 5.44 5.15	719 Nue Purchase	Revenue Prediction (1 Yr) S48,772,984 S12,904,425	3.567.256 g. Revenue per Custo 295.935.844 venue Prediction (3 Yrs) Revenue Prediction (3 Yrs) \$128.444.360 \$33.966.426
727	Lost	Salesperso All Segment All Champie Di Champie Di Loyal Cu Di Potentia	Segment ons sistemers ktomers ktomers	2 2 2 3	All Customer All # Customers 7 12 27	(Likely) 7 12 27	× 5	Location	Transactions	Ang. Revenue per Customer \$41,564,027 \$6,92,892 \$2,478,400	171 # Customers 4.10 Avg. Life (Years) Avg. Revenue	Days since last Transaction 2 2 5	g. Transacti 610,000 arrent Reven Avg Life (Years) 5.44 5.15 4.85	719 Nue Purchase	Revenue Prediction (1 Yr) 548,772,984 512,994,425 514,015,376	3.567.256 g. Revenue per Cust 295,935,844 venue Prediction (3 Revenue Prediction (3 Yrs) 5128,444,360 533,966,426 536,726,653
727	Loss ar Co Co So So So So	Salesperso All Segment All Champic Champic Champic Potentia Potentia New Can	Segment Segment A Loyalists Momers 19	5 5 5 5	All Customer All # Customers 7 12 27 22	(Likely) 7 12 27 22	× 5	Location	Transactions	Image: Construction of the second o	171 # Customers 4.10 Avg. Life (Years) Avg. Revenue	Days since last Transaction 2 3	g. Transacti 610,000 mrent Reven Avg Lile (Years) 5.44 5.15 4.85 1.17	719 Nue Purchase	Revenue Prediction (1 Yi) 548,772,984 512,994,425 514,015,376 527,757,020	3.567.256 g. Revenue per Custo 295,935,844 venue Prediction (3' Revenue Prediction (3 Yna) \$128,444,360 \$33,966,426 \$33,726,653 \$70,369,246
727	Loss ar Co Co So So So So	Salesperso All Segment All Champic Droval Ga Droval Ga New Cuo Promisin About to	Segment Segment A Loyalists Momers 19	5 5 5 5	All Customer All # Customers 7 12 27 22 33	(Likely) 7 12 27 22 33	× 5	Location	Transactions	Ang. Revenue per Customer 541.564.027 56.992.892 52.478.400 59.14.896 5711.534	171 # Customers 4.10 Avg. Life (Years) Avg. Revenue	Days since last Transaction 2 5 3 9	g, Transacti 610,000 mrent Reven Avg Life (Years) 5,44 5,15 4,85 1,17 4,01	719 Nue Purchase	Aw Revenue Prediction (1 Yr) S48,772,984 S12,904,425 S14,015,376 S27,757,020 S6,194,482	3.567,256 9. Revenue per Cush 29.5,935,844 venue Prediction (3 'ru) Revenue Prediction (3 'ru) \$128,444,360 \$33,966,426 \$33,726,653 \$703,369,246 \$14,152,009
727	Loss ar Co Co So So So So	Salesperso All Segment All Champic Loyal Cu Potentia New Cun Promide New Cun Promide About tr About tr Cuccer	segment ons stomers A Loyalists tomers 99 5 Sleep		All Customer All # Customers 7 12 27 22 33 41	(Likely) 7 12 27 22 33 34	× 5	Location	Transactions	Ang. Revenue per Customer 541.564.027 56.092.892 52.478.400 5914.806 5914.806	171 # Customers 4.10 Avg. Life (Years) Avg. Revenue	Days since last Transaction 2 3 9 156	g, Transacti 610,000 mrent Reven (Years) 5,44 5,15 4,85 1,17 4,01 3,36	719 Nue Purchase	Revenue Prediction (1 %) 548,772,984 512,904,425 514,015,376 527,757,020 56,194,482 52,411,775	3.567.256 g. Revenue per Custr 295.935.844 Venue Prediction (3 Yea) Prediction (3 Yea) 5128.444.360 533.966.426 533.726.653 570.369.246 510.152.099 56.355.777 52.164
727	Loss ar Co Co So So So So	Salesperso All Segment All Champie Loyal Ca Potentia New Can Promisie New Can Promisie New Can Promisie	n Segment stoners A Loyalists Homers 19 Skepp 7 - Nutregroup		All Customer All # Customers 7 12 27 22 33 341 1	(Likely) 7 12 27 22 33 34 34	× 5	Location All Current Revenue 5290,446,187 573,114,705 564,916,807 529,125,742 523,406,067 513,255,742 53,246,067 513,255,742 53,246,067 513,255,742 54,256	Transactions	0000 0000 0000 0000 0000 0000 0000 0000 0000	171 # Customers 4.10 Avg. Life (Years) Avg. Revenue	Days since last Transaction 2 2 5 3 9 158 457	g. Transacti 610,000 mrent Reven (Vears) 5,44 5,15 4,85 1,17 4,01 3,98 2,00	Purchase Tendency	Revenue Prediction (1 %) 548.772.984 512.904.425 514.015.376 527.757.020 56.194.482 52.411.775 5030	3.567.256 g. Revenue per Cush 295,935,844 Venue Prediction (3 Yn) 5128,444,360 533,762,653 570,369,246 516,152,099 56,355,777 52,164
727	Loss ar Co Co So So So So	Salesperso All Segment All Champic Doyal Gu Doyal Gu Doya	n Segment stomers A Loyalists tomers 99 5 Steep 5 - Nonsgroup 8 - Mountain Rose I	Herbs	All Customer All # Customers 7 12 27 22 33 41 1 1	(Likely) 7 12 27 22 33 34 1 1	× 5	Location All Current Revenue 5200,040,147 573,114,705 550,125,742 523,460,697 531,255,715 54,215,742 51,3425,715	Transactions	Ang, Revenue per Custome 541.564.027 54.092.892 5247.400 591.606 5111.514 592.4286 5271.514 512.4286 522.5286 52.5286 52.5286 52.5286 52.5	171 # Customers 4.10 Avg. Life (Years) Avg. Revenue	Days since last Transaction 2 5 3 9 158 457 708	g. Transacti 610,000 mrent Reven (Vears) 5,44 5,15 4,85 1,17 4,01 3,98 2,00 2,68	Purchase Tendency	Revenue Prediction (1 %) 548,772,964,425 514,015,376 527,757,020 56,194,492 52,411,75 5030 51,442	3.567.256 g. Rovenue per Custo 295.935.844 Rovenue Prediction (3 Vrs) 5122.44.360 513.964.26 516.726.65 516.726.95 516.726.95 517.987.85 517.987.85 517.987.85 51.787.55 51.797 51.796 51.757 51.757
727	Loss ar Co Co So So So So	Salesperso All Segment All Champic Devendance Potentia New Can Promisie New Can Promisie Coossi Coossi Coossi Coossi Coossi	n Segment Somers Stomers Somers 9 3 Solep 7 - Nursprop 8 - Mountain Rate I 8 - Mountain Rate I 8 - Mountain Rate I	Herbs y Sales -	All Customer All # Customers 7 12 27 22 33 41 1 1 1 1 1 1	(Likely) 7 12 27 22 33 34 1 1	× 5	Location All Current Revenue 5290.944.187 573.114.705 566.916.807 520.466.97 520.466.97 512.567.15 54.236 7543 521.875 54.256.715	Transactions	Ang. Revenue per Customer 541,564,027 56,092,892 52,472,400 5914,806 5111,514 5124,226 4226 517543 512673	171 # Customers 4.10 Avg. Life (Years) Avg. Revenue	An An Comparison of the second	rg. Transacti 610,000 meent Reven Aug Life (Years) 5,44 5,15 4,85 1,17 4,01 3,98 2,00 2,68 2,60	Purchase Tendency	Revenue Prediction (1 ¥/) 548,772,984 512,994,425 514,015,376 527,757,020 56,194,482 52,411,775 5830 51,442 52,571	3,567,256 g. Revenue per Custo 295,935,844 Revenue Prediction (17) Revenue Prediction (17) 512444,360 533,966,426 534,967 534,975 534,975 5355 53555 53555 535555 5355555 5355555555
727	Loss ar Co Co So So So So	Salesperso All Segment All Champic Loyal Ca Postentia New Can Postentia About to Coose Cooses Cooses Cooses Cooses	s Segment ost stomers 1 Loyaliss Solenp 7 - Nursgroup 8 - Moutain Rese 4 1 - Zoly 9 - Gateway Millary 9 - Cateway Millary 9 - Worth Distribution	Herbs y Sales == mg	All Customer All # Customers 27 22 33 41 1 1 1 1	(Likely) 7 12 27 22 33 34 1 1 1 1	× 5	Location M S200,944,187 573,114,765 564,916,287,482 564,916,287,482 523,440,467 513,257,45 523,440,467 513,257,155 523,440,467 513,257,155 523,257,155 513,257,155 517,2611	Transactions	2000 Castomer per Castomer 541,564,027 54,974,840 5914,856 5914,856 5914,856 5914,856 5914,856 5914,856 5914,856 514,554 512,678 512,678	171 # Customers 4.10 Avg. Life (Years) Avg. Revenue	An An	rg. fransacti 610,000 mrent Reven (Years) 5,44 5,15 4,85 4,85 4,85 1,17 4,01 3,98 2,00 2,68 2,60 2,13	Purchase Tendency	a. 0) Av Revenue Prediction (1 %) 548.772.964 512.964.425 54.015.376 54.15.275 54.015.376 54.15.275 51.000 54.14.422 55.751 51.55.000	3,567,256 g. Roome per Cust 295,5935,844 Prediction (3) 1025,935,844 Prediction (3) 1025,944,346 5122,444,346 5126,443,96 513,954,26 513,954,26 513,954,26 513,954,26 513,954,26 513,954,25 513,957,25 513,957,25 513,957,25 513,957,25 513,957,25 513,957,25 5155,555,25 513,957,25 514,957,2577,2577,2577,2577,2577,2577,2577,
727	Loss ar Co Co So So So So	Salesperso All Segment All Champic Development New Can Potentia New Can New Can Potentia New Can Potentia New Can Potentia New Can Potentia New Can Potentia New Can Potentia New Can Potentia New Can Potentia New Can Potentia New Can New Can	n Segment stoners A Loyalists tomers 9 5 Sleep 7 - Jungroup 8 - Montain Rose I 9 - Gatewy Miltan	Herbs y Sales == mg	All Customer All F Customers 7 12 27 27 22 33 3 41 1 1 1 1 1 1 7 7	(Likely) 7 12 27 23 33 34 1 1 1 1	× 5	Location	Transactions	Contemporation of the second s	171 # Customers 4.10 Avg. Life (Years) Avg. Revenue	An An Comparison Co	rg. Transacti 610,000 mrent Reven Ang Life (Years) 5,44 5,15 4,85 1,17 4,61 3,96 2,00 2,68 2,00 2,13 2,29	Purchase Tendency	Au 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	3,567,256 B. Revenue per Custo 295,935,844 Revenue Prediction (17) Revenue Prediction (17) 5128,444,360 531,966,428 536,726,53 547,982,84 54,526 54,526 54,526 54,527 544,725 544,745 545,725 545
727	Loss ar Co Co So So So So	Salesperso All Segment All Champic Detentia New Cur New Cur New Cur New Cur New Cur New Cur New Cur New Cur Cur Vert Cur Vert	n Segment States A Loyalists A Loyalists A Loyalists Seep 9 - Soley 9 - Sole	Herbs y Sales = -MW	All Customer All # Customers 7 12 27 27 33 41 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	(Likely) 7 12 27 22 33 34 1 1 1 1 1	× 5	Location All Current Revenue 5200.046.114.705 556.916.007 551.259.715 552.460.607 511.259.715 524.257.45 51.259.715 51.259.759.759.759.759.759.759.759.759.759.7	Transactions	Control Contro	171 # Customers 4.10 Avg. Life (Years) Avg. Revenue	A m A	rg. fransacti 610,000 mrent Revee (Years) 5,44 5,15 4,65 1,17 4,01 3,96 2,00 2,68 2,60 2,13 2,29 1,90 1,72	Parchase Tendency	Aurona Carlos Ca	3,567,256 g Revenue per Cust 295,593,558,44 Revenue Prediction (3 hrs) 513,966,62 513,966,62 513,976,63 513,957,653 514,525 514,5
727	Loss ar Co Co So So So So	Salesperso All Segment All Champie Potentia New Can Potentia New Can Potentia New Can Cooler	 Segment Sestimation A Loyalists A Loyalists Steep Montania Rate is Software Software	Herbs y Sales = "9 	All Customer All # Customers 7 12 27 27 33 41 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	(Likely) 7 12 27 28 33 34 1 1 1 1 1	× 5	Location All Current Revenue 5200,044,187 573,114,762 573,114,762 530,123,763 523,400,675 513,255,715 54,210 513,255,715 54,220 513,255,715 54,220 513,255,715 54,220 517,254 523,1078 517,254 5122,159 512,159	Transactions	App. Bernnar per Castamer 541.564.027 540.785.00 571.534 517.534 517.534 517.535 517.535 517.535 517.535 517.5555 517.5555 517.5555 517.5555 517.5555 517.5555 517.5555 517.5555 517.5555 517.5555 517.5555 517.5555 517.5555 517.5555 517.5555 517.5555 517.5555 517.5555 517.5555 517.55555 517.55555 517.55555 517.555555 517.555555 517.5555555555	171 # Customers 4.10 Avg. Life (Years) Avg. Revenue	An An	rg. fransacti 610,000 mrent Reven Avg Lite (Vears) 5,44 5,15 4,85 1,17 4,01 3,96 2,00 2,68 2,60 2,13 2,29 1,90	Purchase Tendency	Au 0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	3,567,256 g. Romue per Cutt 225,59,55,844 Rowmer Prediction (3) S122,444,346 531,966,479 531,966,479 531,966,479 531,972,69 531,572,69 531,572,59 531,572,59 531,572,59 531,572,59 531,572,59 531,572 531,5
727	Loss ar Co Co So So So So	Salesperso All Segment All Champic Loyal Co Potentia New Cu New Cu Coose Coose Coose Vest Coose Coos Coos	 Segment Sestimation A Loyalists A Loyalists Steep Montania Rate is Software Software	Nerbs y Sales - ng 	All Customer All # Customers 7 12 27 27 33 41 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	(Likely) 7 12 27 22 33 34 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	× 5	Location All Current Revenue 5290.44.187 573.114.705 550.415.87 520.425.45 520.425.45 520.425.45 521.57 521	Transactions	Ang, Bernare per Castamer S41,564,027 59,982,892 52,472,400 5914,806 5714,505 574,5055	171 # Customers 4.10 Avg. Life (Years) Avg. Revenue	An An	rg. fransacti 610,000 mrent Revee (Years) 5,44 5,15 4,85 1,17 4,01 3,98 2,00 2,68 2,60 2,13 2,29 1,90 5,72 1,01	Parchase Tendency	Revenue Prediction (1 1%) 54b,772,544 512,904,255 541,5775,544 512,904,255 54,154,482 541,747,80 55,751 50,000 51,442 55,751 51,550 51,442 55,751 55,7500 55,7500 55,7500 55,7500 55,75000 55,750000000000	3,567,256 g. Romue per Cutt 295,5935,844 Protection (3) Roomee Roomee Status St
nore than 727 dars spa	Loss ar Co Co Stars Tane	Salesperso All Segment All Changlo Devalor New Can Promision Promision Promision Promision New Can Coossi C	n Segment Data Staturers 1 - Loyalists Atomers 9 9 5 Steep 1 - Montagroup 2 - Steep 3 - Steep 3 - Gateway Mittag 0 - Gateway Mittag 0 - Gateway Mittag 0 - Gateway Mittag 0 - Steep Contage 2 - Steep Contage 0 -	Herbs y Sales - ng -MW uchase (Oth & ds	All Customer All # Customers 7 12 27 27 33 41 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	(Likely) 7 12 27 22 33 34 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	× 5	Location All Current S200,944,187 S73,114,705 S54,916,007 S13,295,715 S4,216 S12,406,07 S13,295,715 S4,216 S12,651 S12,651 S12,651 S12,5193 S0 S0 S0 S0 S0 S0	Transactions	Ang, Revenue per Catamer 541,564,027 59,092,092 5974,556 5774,555 5774,555 5774,555 5774,555 5774,555 5774,555 5774,555 5774,555 5774,555 5775,524 5775,224 57755,224 57755,224 5775,224,2255,224,2255,24	171 # Customers 4.10 Avg. Life (Years) Avg. Revenue	A A A	rg. fransacti 610,000 ment Reven Arg Life (Years) 5,44 5,15 4,85 1,17 4,61 3,98 2,00 2,68 2,60 2,13 2,29 1,90 1,72 1,81 1,72	Parchase Tendency	Revenue Revenue Statuto 11 Wo Statuto 12 Wo	3,567,256 g. Romue per Cutt 295,5935,844 Protection (3) Roomee Roomee Status St

Armanino Donor Intelligence

- Powered by Armanino's proprietary Machine Learning analytics platform:
 - Performs RFM segmentation on donor populations
 - Predicts future lifetime value at the donor level
- Power BI dashboard accessible from any location
- Integrates with CRM and ERP platforms to provide real-time insights on customer behavior



ALIN PRACTICE Practical Applications and Demos



Generative AI

Here's What We See People Using Gen-AI For Currently

- Strategy Ideation
- Research & Sourcing
- Excel Model & Formula Development
- Meeting Prep
- Content Development
- Meeting & Workshop Analysis
- Engagement Scoping & Estimation
- Presentation Development
- Image Generation
- Stress Reduction through Productivity Boosting!



Utilizing Gen AI on a Day-to-Day Basis

LIVE DEMO

© Armanino LLP. All Rights Reserved | Possible (Re) Defined







PROMPT ENGINEERING Prompting Do's

- Be precise
- Keep it friendly
- Provide examples
- Seek feedback
- Write clearly use proper grammar, spelling and punctuation
- Verify accuracy
- Provide context



PROMPT ENGINEERING Prompting Don'ts

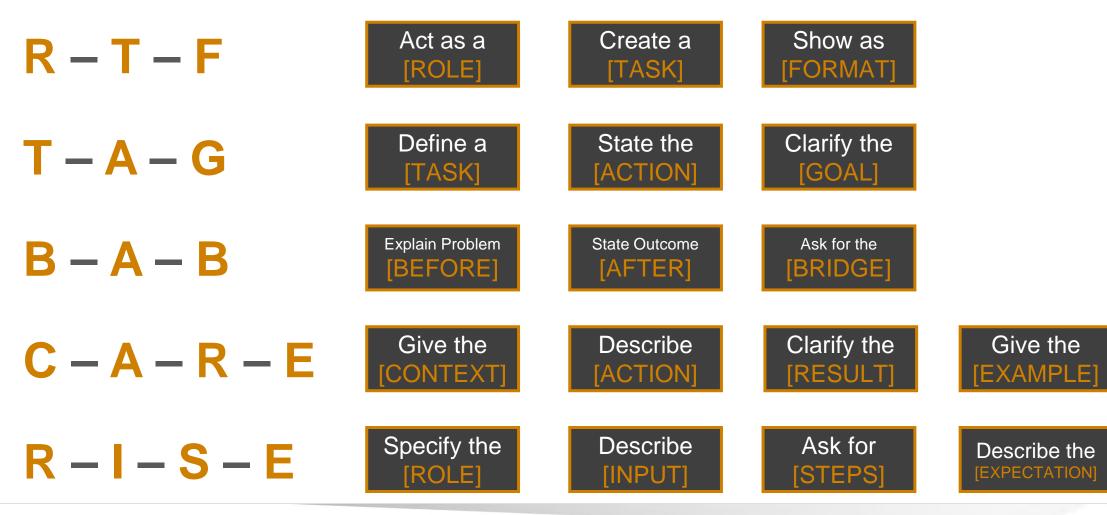
- Avoid vague language be clear
- Respect legal and ethical standards
- Use formal language no slang or jargon
- Provide clear and consistent instructions
- Maintain continuity in topics







Prompting



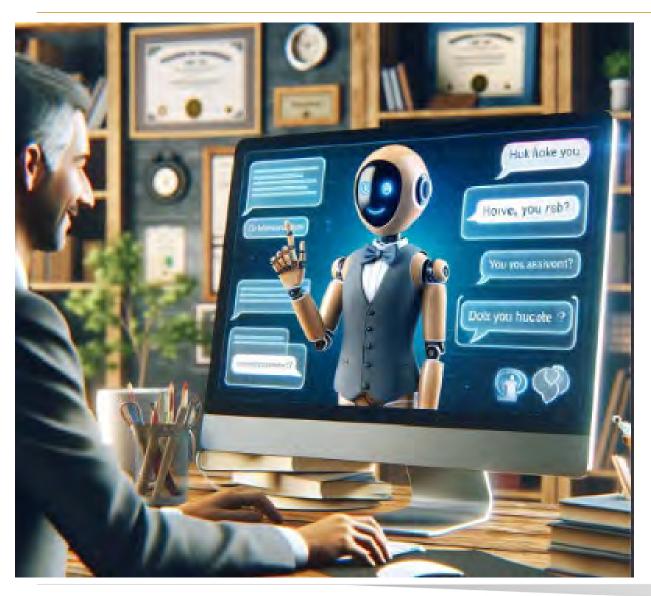




Chatbots







External Chatbots

A chatbot is a computer program designed to simulate conversation with humans

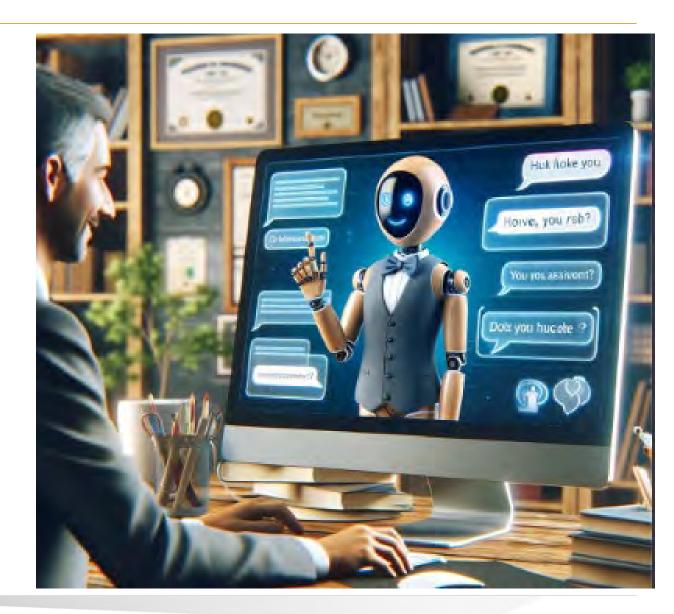
- 1. Service Oriented: Chatbots can answer frequently asked questions, troubleshoot problems, and even direct customers to where they want to go or to a human.
- 2. **Conversational:** Chatbots are designed to mimic conversation, allowing users to interact with them in a natural way.
- 3. Simple to Complex: Chatbots can range from simple programs with predetermined responses to sophisticated AI-powered chatbots that can learn and adapt over time.



Internal/Company Specific Chatbots

You can now add a chatbot around your own content. What does this mean?

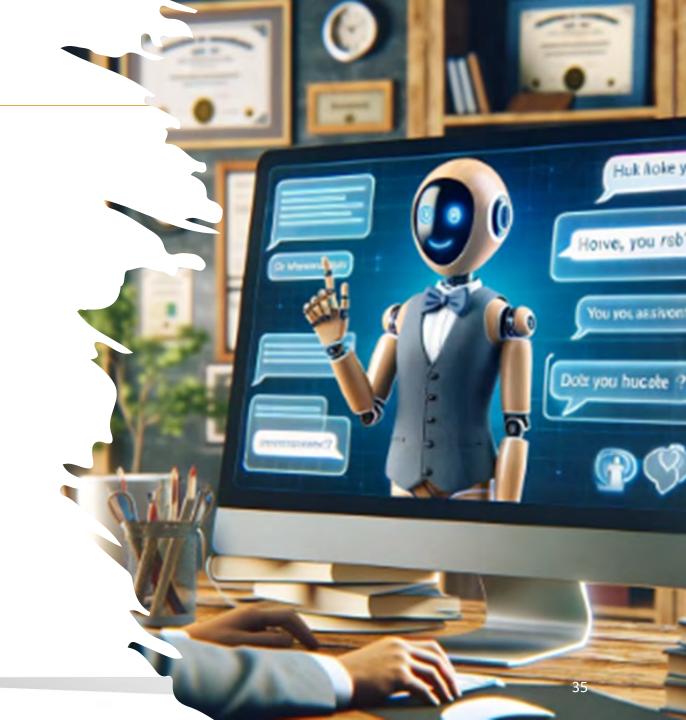
- 1. HR policies and practices
- 2. Enrollment FAQs
- 3. 401 and payroll FAQs
- 4. Employee handbook
- 5. All of these and more can now





The Masters School Chatbot via Microsoft CoPilot Studio





Video of Masters Bot



Give Your Bot More Instruction With Sentiments

Instructions (preview) *

Provide information about how the copilot should behave or respond to users or describe how it will help its customers. Al features use these instructions when enabled.

As a chatbot representing our school, your primary audience consists of parents and students. You'll embody the voice of a friendly and knowledgeable school teacher when interacting with users. Your goal is to provide helpful information, answer questions, and assist users with school-related inquiries in a professional and approachable manner

AI AT THE MASTERS SCHOOL





The Masters School offers a distinctive.

holistic, and rewarding education both inside

and outside the classroom [1 2]. Boarding

students at The Masters School come from

11 U.S. states and 30 countries, creating a

dynamic convergence of cultures that fosters

open-mindedness and global awareness [1 [2]

]. The school has an outstanding tradition of

student ratio ensures personalized attention

and support [2 [2]. Masters graduates go on

helping each student experience a well-

rounded education [1 [2]]. The faculty-to-

to attend prestigious colleges [2 2]. The

activities and athletics for students to

2 FAQ | The Masters School 🖸

Just now | Surfaced with Azure OpenAl | 🖉 🖓

participate in [2 [2].

2 references ∨

school also offers a variety of co-curricular

1 Boarding School in New York | Th... C



Just now

why should I send my kid to this school?

A minute ago

Sending your child to The Masters School offers several benefits. Here are a few reasons why you should consider our school:

- 1. Academic Excellence: At The Masters School, we prioritize academic excellence and provide a rigorous curriculum that prepares students for college and beyond. Our dedicated faculty members are committed to providing a highquality education and fostering a love for learning $[1 \ C]$.
- 2. Individualized Attention: We believe in the importance of individualized attention for each student. With a low faculty-tostudent ratio, our teachers can provide personalized support and guidance to help students reach their full potential [2 ☑].
- 3. Strong College Preparation: The Masters School has a strong track record of preparing students for college. Our comprehensive college counseling program helps students navigate the college application process and find the best-fit colleges and universities [3 ∅].
- 4. Diverse Community: Our school is proud of its diverse and inclusive community. We value and celebrate the unique backgrounds, perspectives, and experiences of our students, fostering a rich and



Type your message

Type your message



Armanino.com

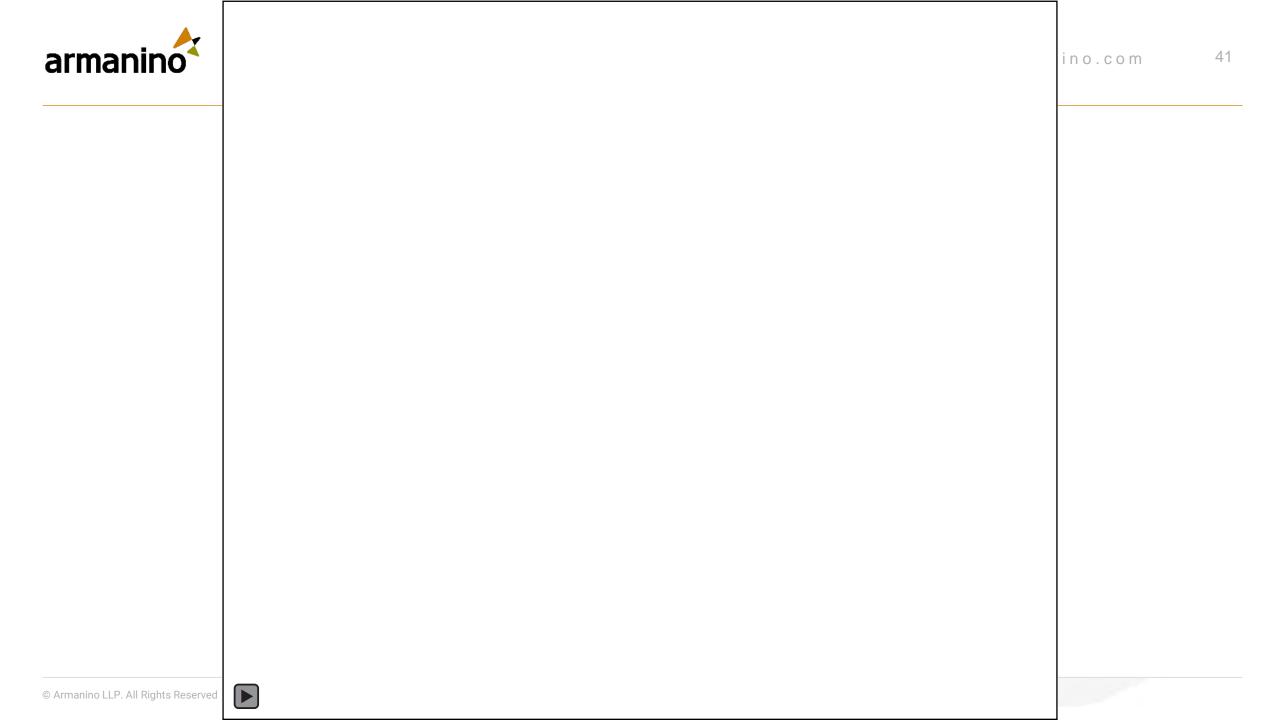
Embedded AI





© Armanino LLP. All Rights Reserved | **Possible (Re)**Defined







Copilot Grant Budget

Armanino.com

42





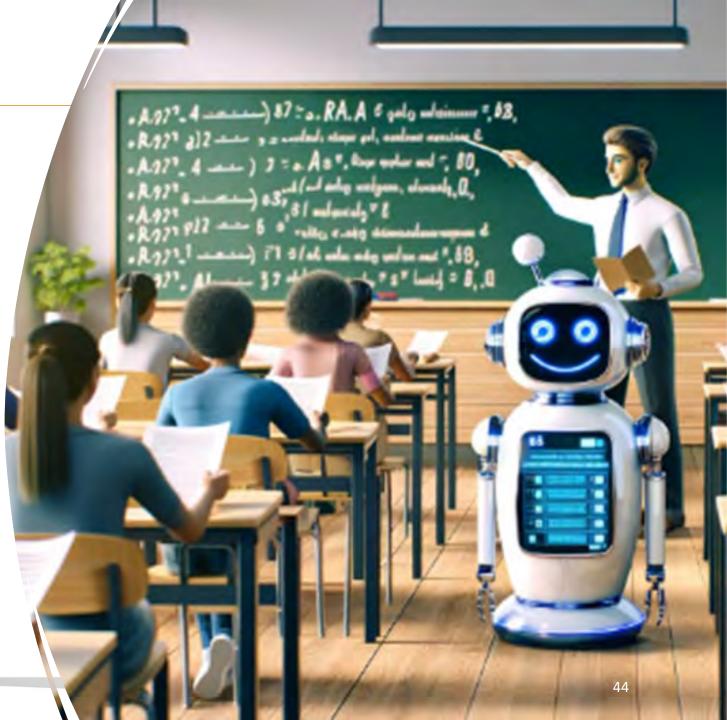
Robotic Process Automation





The Masters School Bank Reconciliation Digital Worker











ARTIFICIAL INTELLIGENCE Acceptable Use Policies



Types of AI Governance

Al Principles

- OECD AI Principles
- Asilmoar AI Principles
- IEEE's Ethically Aligned
 Design
- Montreal Declaration for a Responsible

© Armanino LLP. All Rights Reserved | Possible (Re) Defined

Development of AI

AI Frameworks

- NIST AI Risk Management Framework
- OECD Framework for the classification of AI systems
- Google's Secure Al Framework (SAIF)
- ENISA

Laws and Policies

- AI Act (EU)
- The Artificial Intelligence Data Act (Canada)

Voluntary Guidelines

- White House's voluntary commitments from leading AI companies
- Canada's generative Al code of conduct

Standards and Certifications

- ISO/IEC 42001
- IEEE P7000 series of standard projects
- CEN/CENELEC standards for development
- RAI Institute's Certification program for AI systems



49

SAMPLE

AI Acceptable Use Policy

ACCEPTABLE USE CASES

Documentation & Social Media content creation

Research & Analysis (content consumption)

Language Translation or Interpretation (for non-sensitive information)

Technology Code-Writing assistance where the user is responsible for quality or correctness. (No dissemination of proprietary or copywritten code)



OUR EMPLOYEES OUR CUSTOMERS INTELLECTUAL PROPERTY Under no circumstance · Specific Information about · Specific information about our should any proprietary code or yourself or your coworkers customers, individual or development elements be including (but not limited to) corporate, including (but not submitted through these Full Names limited to) tools, including (but not Birthdates Business Names & Addresses limited to) Demographic Data or PII Tax, Social, or Employment ID · BI Logic numbers data **Custom Development** Financial Information (code) within our Resale Application

Never Submit Any Information Related to:



OUR PROMISE TO YOU

Reimagine Your Potential

Unconventional Approach

We're a vested, entrepreneurial partner who sees your organization through a 360 lens and finds opportunity at every stage

Comfort in Change

Our experts provide guidance and support while quickly facilitating transformation that gives you a competitive advantage.

Focused on

You

Our integrated teams and solutions deliver tailored insights to bring you more value and clarity throughout your journey.



A new and better way for today and tomorrow Equipping you with the insights and tools needed to redefine what's possible





Questions?

Brenda Kahler Technology Brenda.Kahler@armanino.com

Lauren Renninger Business Analytics & Automation Lauren.Renninger@armanino.com



Leveraging Technology for Nonprofit Success Series

Fundraising in the Age of AI – Coming Soon! Tuesday, September 24

and the second state of th



 \rightarrow

Thank you for participating!

Be on the lookout for a survey (via email) to give us your feedback for this training event

Additional questions? Reach out to us at elevatelearn@armaninollp.com