AI Process Review Discovery Questionnaire

Please complete this questionnaire before your onsite visit. Your responses will help us understand your organization's current workflows and identify areas where AI may help reduce manual effort, increase efficiency, and enhance ministry outcomes.

Mission & Operations

1. What are the main goals or outcomes your organization focuses on?

2. How many staff and volunteers are involved in daily operations?

3. What are the most time-consuming administrative tasks?

Workflow & Data

4. What kinds of forms or reports are filled out regularly?

5. How is data currently stored and shared?

6. Are there repeated data entry tasks between systems?

Decision-Making

7. What information do you wish you had 'at a glance' to make better decisions?

8. Are there areas where tasks get delayed or fall through the cracks?

Communication & Engagement

9. How do you communicate with donors, alumni, or families?

10. Would automating some of those communications help your ministry?

Technology & Tools

11. What tools or systems do you already use (Google Sheets, QuickBooks, etc.)?

12. Do you have staff comfortable with tech or would you need simple automation?

AI Opportunities

13. Are there repetitive tasks or manual processes that frustrate staff?

14. Where do you see the biggest opportunity to save time or reduce paperwork?

15. Are there areas you'd like more insight (e.g., tracking donations, volunteer hours)?

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