H/M Human Machines

Donor tracking is split between 3 spreadsheets and a CRM nobody uses

EXECUTIVE SUMMARY

This report examines a critical organizational challenge: donor tracking is split between 3 spreadsheets and a crm nobody uses.

Our analysis found that emerged from a compliance requirement that has since been updated, but the process wasn't. Previous attempts to fix this addressed symptoms rather than root causes. We've designed a 4-part human-AI collaboration model to transform this workflow.

Key Findings

- *Universal consensus confirmed — this isn't one person's complaint, it's a shared organizational pain point.*

- *Root cause identified: emerged from a compliance requirement that has since been updated, but the process wasn't.*

- *A prior attempt to fix this didn't succeed — likely because root causes weren't addressed.*

- *The real goal is better quality, but the current process has become an end in itself.*

- *A 4-part human-AI collaboration model can transform this workflow using delegating, supervising, approving modes.*

Recommended Approach

We recommend a 4-part collaboration model focused on data gathering and initial analysis, communication and stakeholder updates, quality assurance and compliance. AI fully handles 2 outcomes within defined guardrails. 1 outcome run on AI with human oversight. Humans lead 1 outcome with AI assistance. Run a 30-day pilot with a single team.

THE PROBLEM

"Donor tracking is split between 3 spreadsheets and a CRM nobody uses"

Why This Problem Matters

Universal agreement:
This isn't one person's complaint — it's a shared organizational pain point that everyone recognizes.

Strategic importance:
This problem is critical to the organization's core objectives and outcomes.

Measurable impact:
The dysfunction has clear indicators that will show when improvement occurs.

Previous attempts:
There have been one efforts to fix this before — suggesting the root cause hasn't been addressed.

WHY IT PERSISTS

Emerged from a compliance requirement that has since been updated, but the process wasn't. The nonprofit industry had different pressures then, and the process reflected that reality.

People assume the other department needs this format, but nobody has asked them in years. Meanwhile, people have built workarounds: informal networks that bypass the official channels.

The person who manages this process has built their role around its complexity. The real goal is better quality, but the current process has become an end in itself.

THE SOLUTION

Target Outcomes

1. Data gathering and initial analysis

2. Communication and stakeholder updates

3. Quality assurance and compliance

4. Process coordination and scheduling

Human-AI Collaboration Model

1. Data gathering and initial analysis	Delegating Mode

AI handles:
Collects data from multiple sources, runs initial analysis, flags anomalies

Human handles:
Validates findings, adds context AI can't access, makes final calls

Why: AI excels at this type of work. The volume makes automation essential.

2. Communication and stakeholder updates — Supervising Mode

AI handles:
Drafts communications, maintains consistency, handles routine updates

Human handles:
Reviews for tone, handles sensitive messages, manages relationships

Why: Routine enough for AI with this type of work. Patterns are clear and repeatable.

3. Quality assurance and compliance — Approving Mode

AI handles:
Runs all standard checks, compares against requirements, documents findings

Human handles:
Reviews exceptions, makes judgment calls, signs off on final output

Why: Quality requires this type of work. Judgment calls are frequent.

4. Process coordination and scheduling — Delegating Mode

AI handles:
Manages calendars, resolves conflicts, sends reminders, tracks completion

Human handles:
Handles escalations, makes priority decisions, manages exceptions

Why: AI excels at this type of work. The volume makes automation essential.

MAKING IT HAPPEN

Change Management

Start with the highest-volume use case. Get the affected team aligned before expanding.

Pilot Strategy

Run a 30-day pilot with a single team. Measure before and after, then scale based on results.

Continuous Improvement

Track time saved weekly. Feed human corrections back to improve AI recommendations. Review collaboration modes monthly and adjust based on what's working.

How You'll Know It's Working

- *You identified clear metrics during our conversation — track these weekly and compare against your baseline.*

- *For delegated tasks like "data gathering and initial analysis", measure volume handled and exceptions flagged.*

- *For approval workflows, track review time and approval rates.*

NEXT STEPS

You identified "donor tracking is split between 3 spreadsheets and a crm nobody uses" as a critical organizational challenge.

We traced its origins and found it was designed for constraints that no longer apply.

The 4-part solution assigns 2 delegating, 1 supervising, 1 approving collaboration modes to match each outcome with the right human-AI balance.

Start with the pilot approach outlined above, then scale based on what you learn.

Ready to implement?

Book a 30-minute call | *Email us*