

Seeing Through the AI Hype: Useful Ways to Actually Use AI volume II

Presented By:

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Insource Services, Inc.

About Us: Insource Services, Inc.

Finance

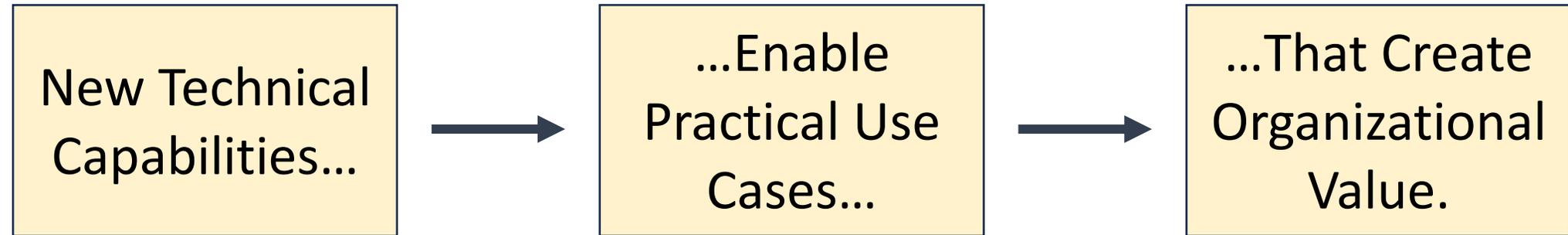
HR

Technology

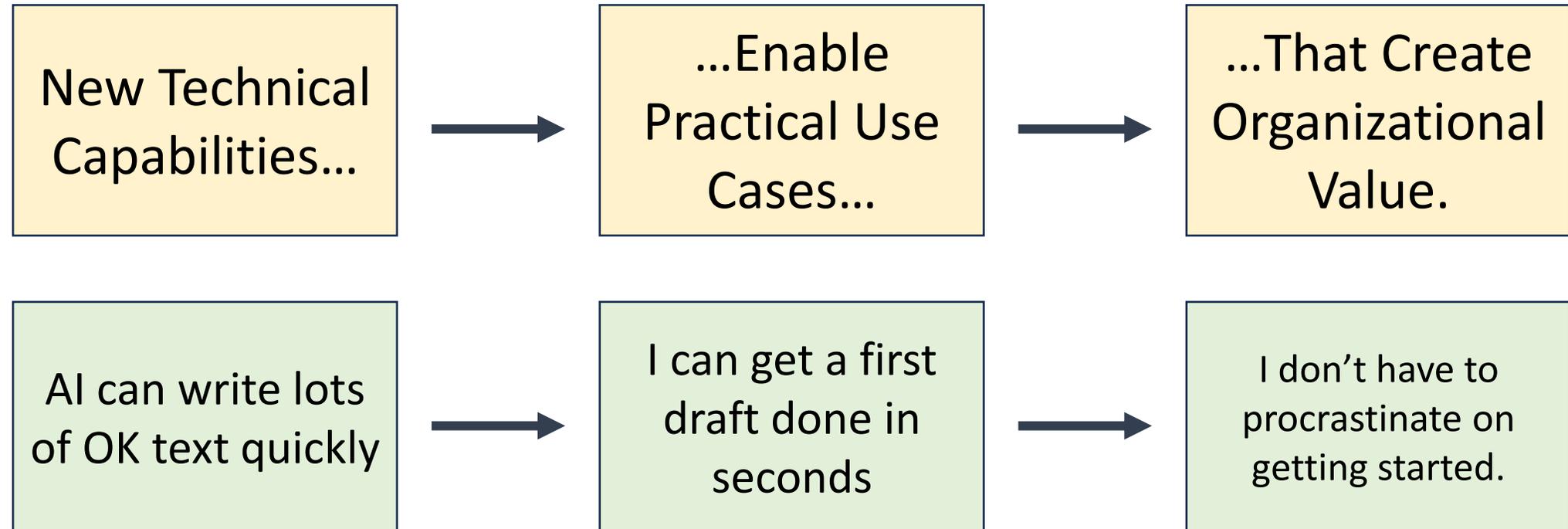
Data & AI

"At Insource, we believe that HR, Finance, Technology, & Data start with people."

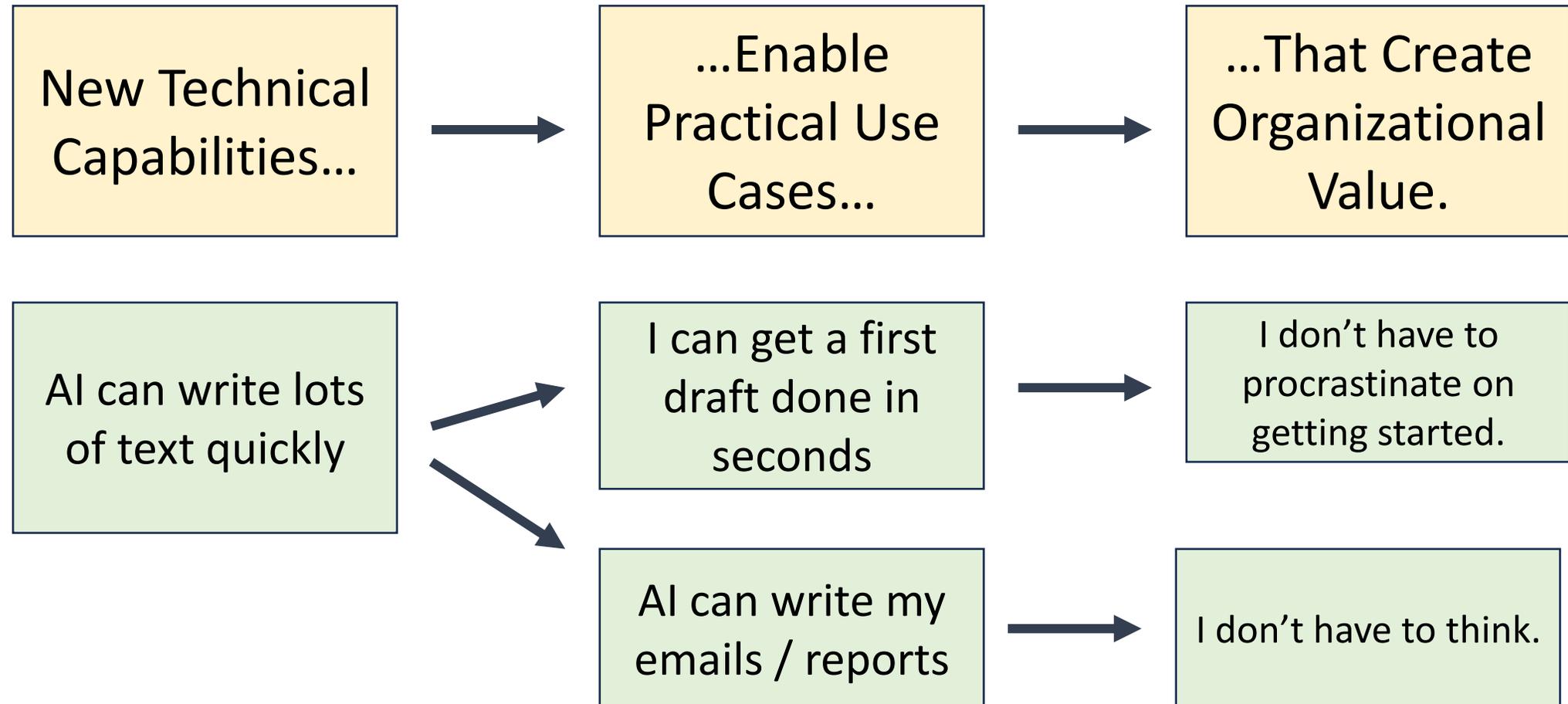
How Does AI Create Value?



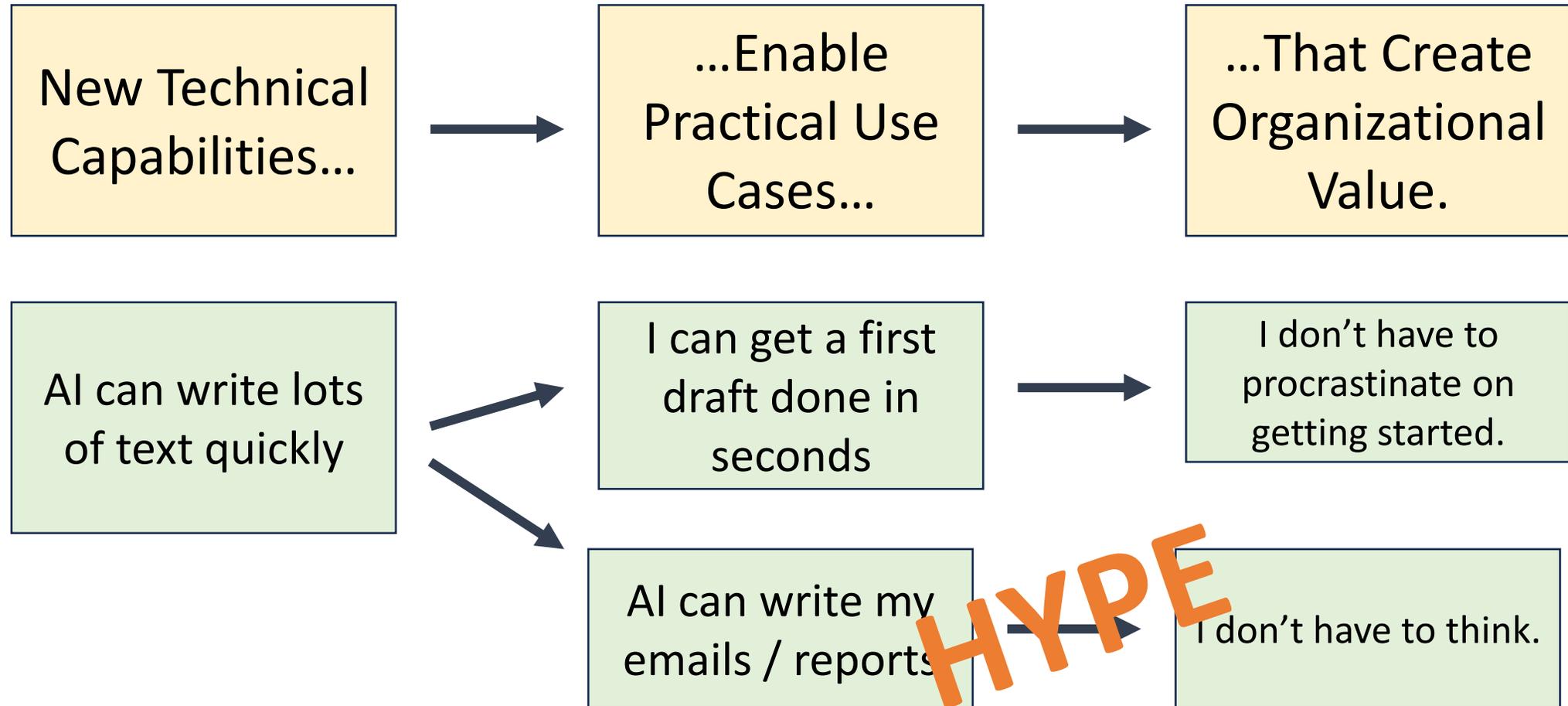
How Does AI Create Value?



How Does AI Create Value?



How Does AI Create Value?



Do

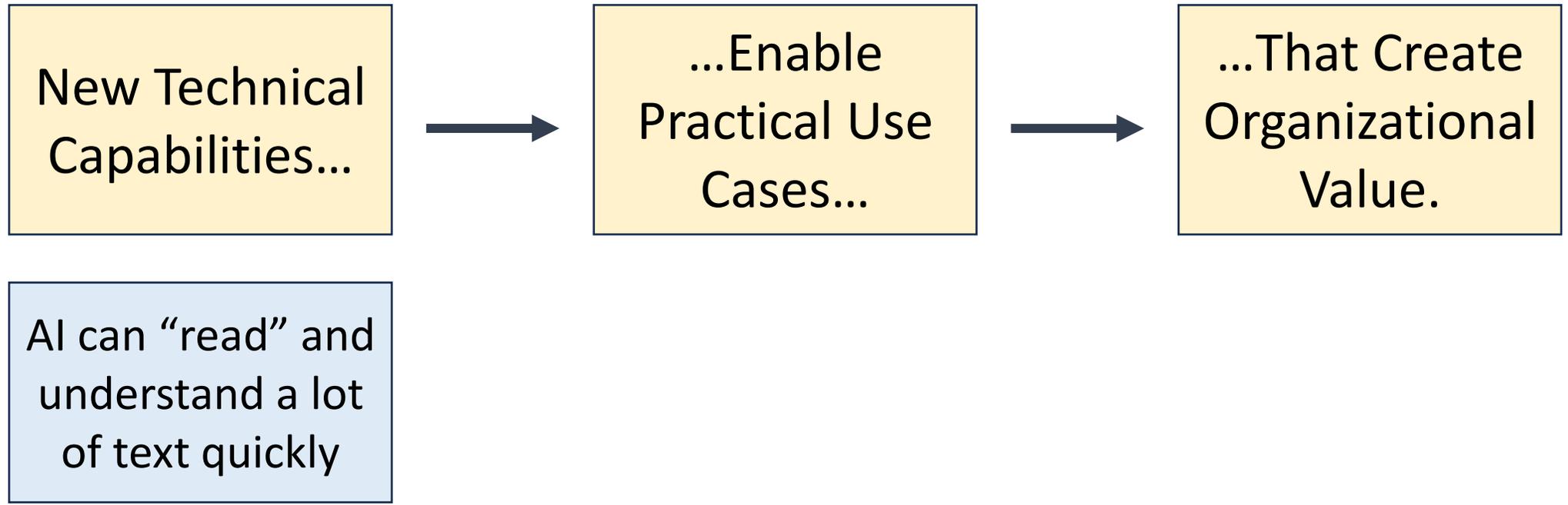
*Use AI When You
Notice Yourself
Procrastinating*

Don't

*Worry about quality
– it's a first draft*

*Use AI as a
substitute for
thinking*

How Does AI Create Value?



AI helps improve my thinking...

I tell AI what
I'm thinking...

Anything I should change on this for a small nonprofit with growth ambitions?

Contemporary SaaS Stack in 2025

Email: Gmail

Documents: Google Docs on Drive

Chat: Slack

Slack is building network effects through the ability to chat in shared channels with people at other organizations, it's very useful

Project Management: Various options here depending on your

For a small nonprofit with growth ambitions, the stack is solid but could use a few nonprofit-specific or cost-conscious tweaks:

✓ Keep as-is

- **Gmail + Google Docs:** Standard, familiar, collaborative.
- **Slack:** Especially valuable if you collaborate across orgs. Consider free plan + Slack Connect.
- **Notion / Whimsical / Asana / Linear:** Use what fits your workflow. Asana is a strong nonprofit-friendly pick.

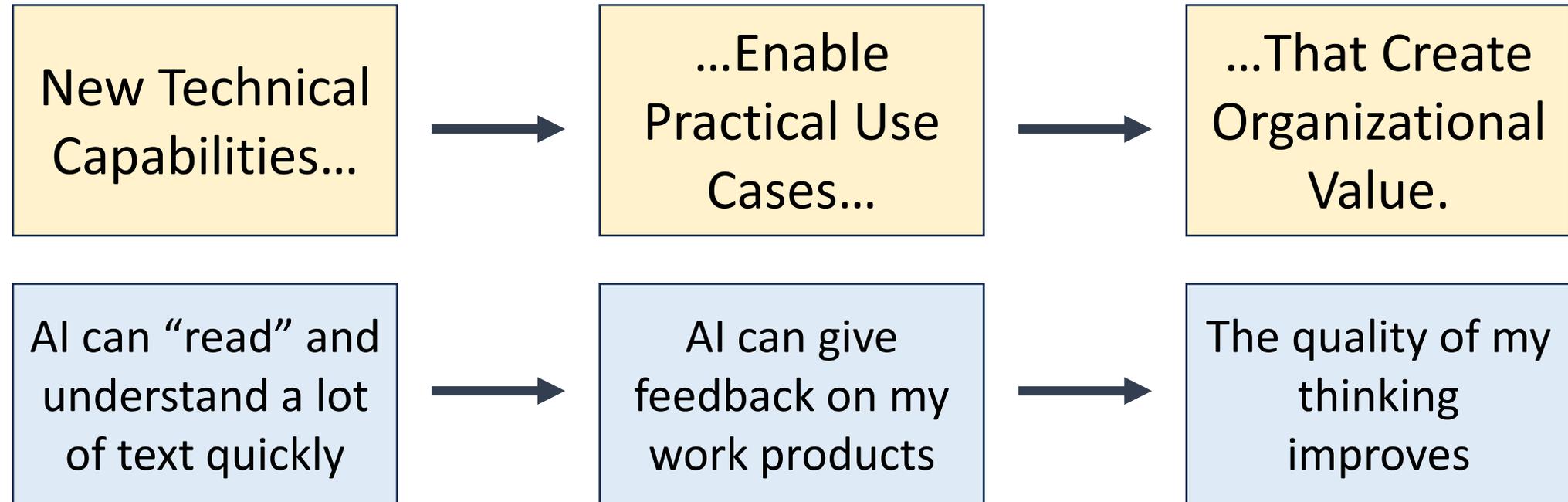
✂ Suggested Tweaks

1. Wiki / Project Management

- **Add: Coda** — Strong Notion alternative, and better at structured data if you're tracking programs or OKRs.

.. and AI tells me
how to make my
thinking better

How Does AI Create Value?



Do

Use AI When You Notice Yourself Procrastinating

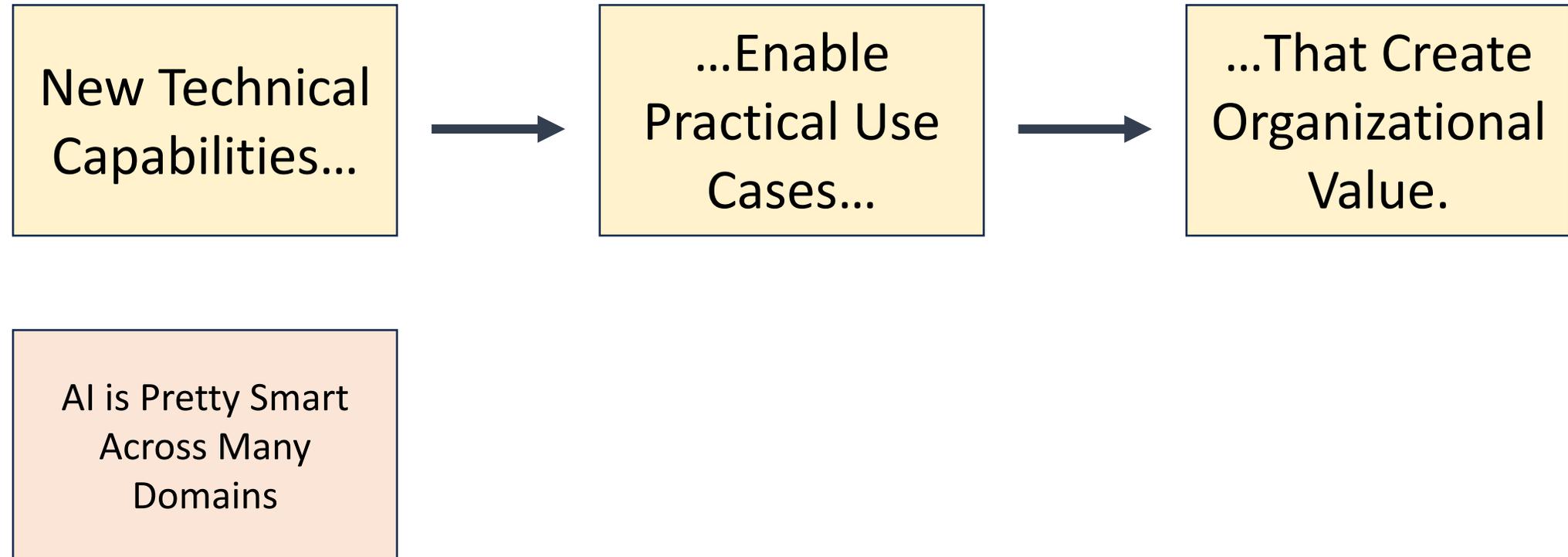
Ask AI for feedback to improve your thinking

Don't

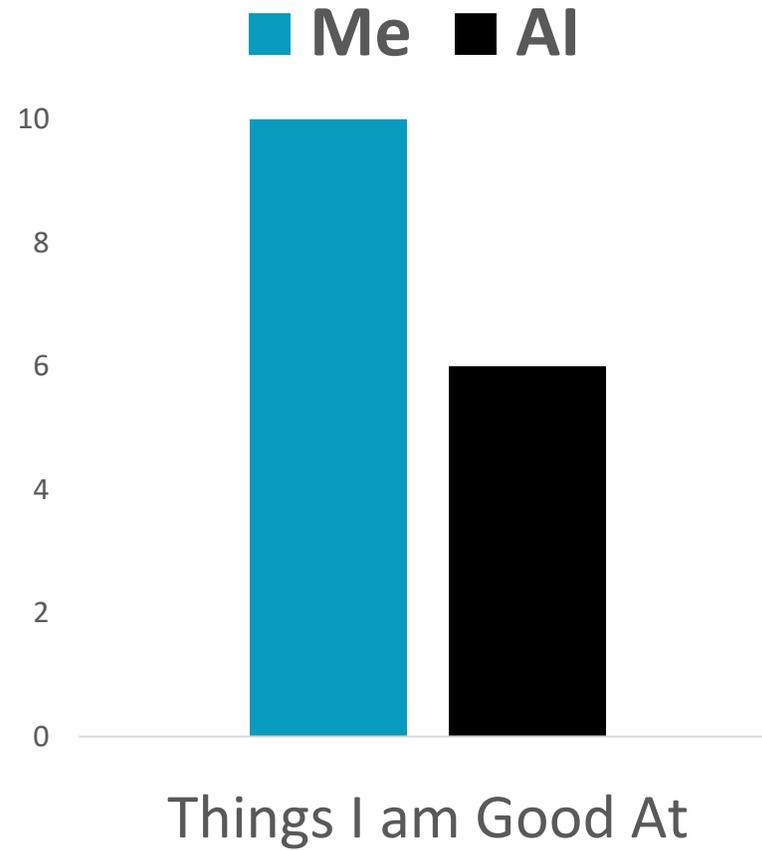
Worry about quality – it's a first draft

Use AI as a substitute for thinking

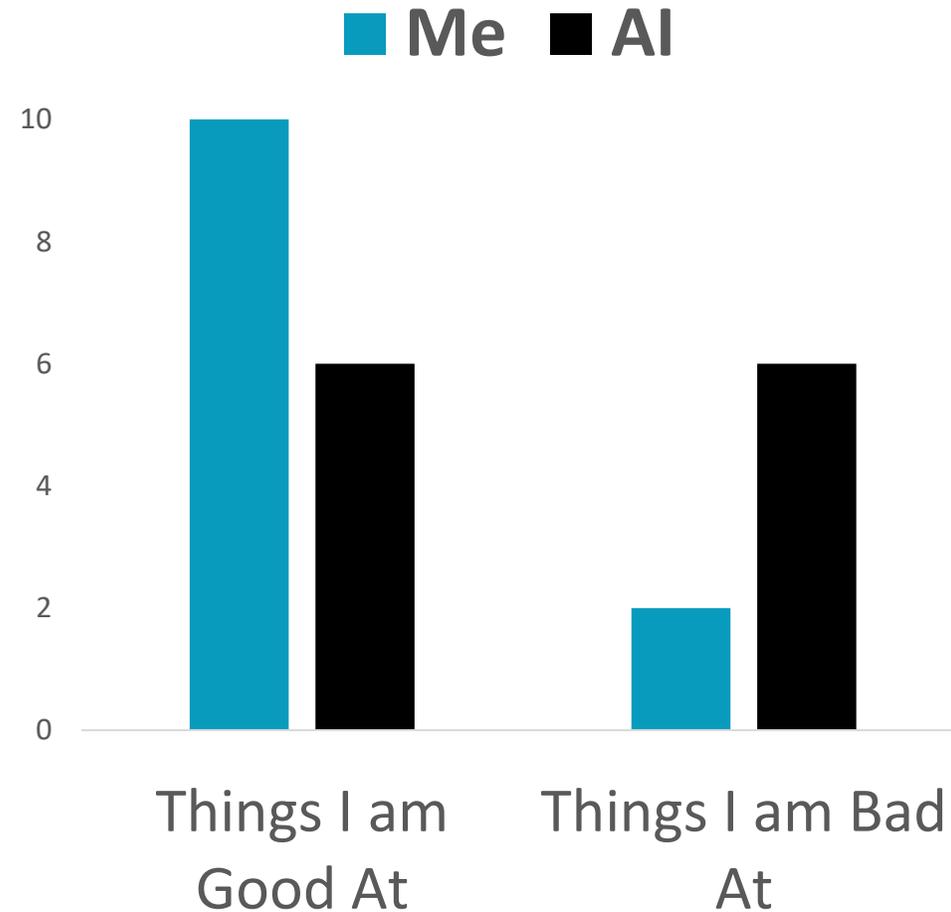
How Does AI Create Value?



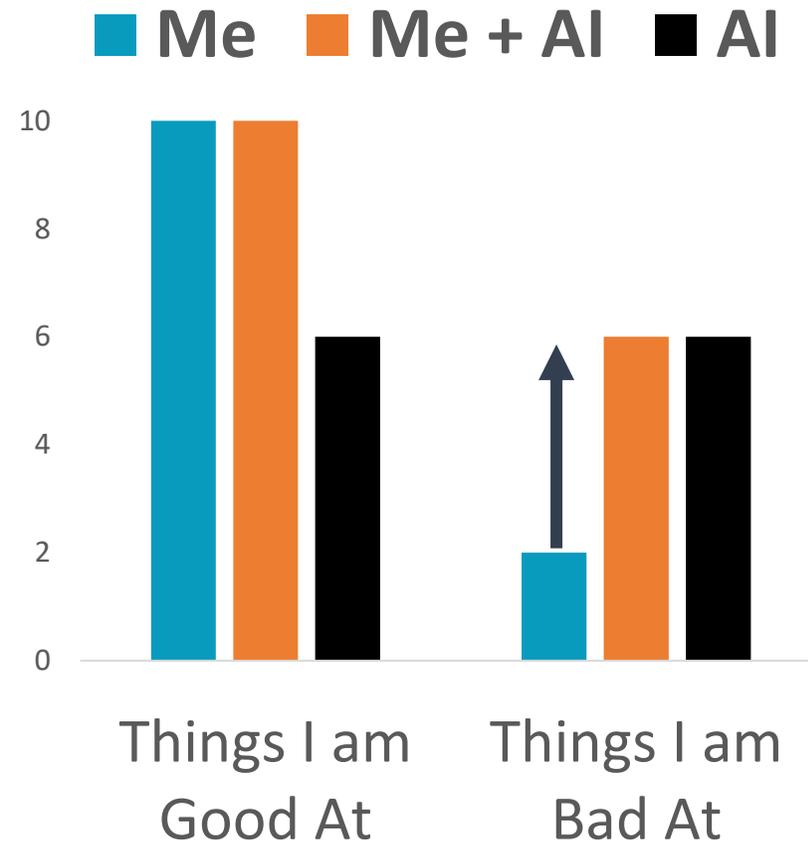
AI Does Not Have Expert-Level Performance (Yet)



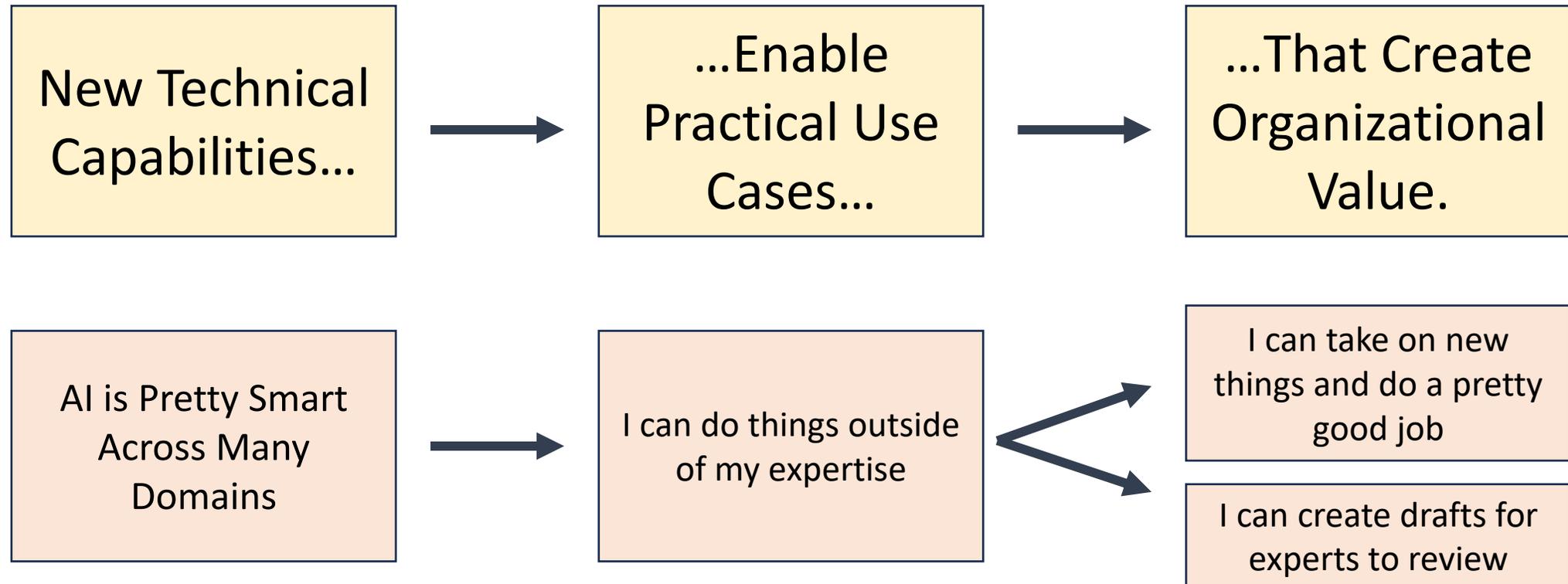
However, AI Does Have Very Broad Knowledge



AI Can Be A Floor Raiser



How Do LLMs Create Value?



Do

*Use AI When You Don't Know
How to Do Something*

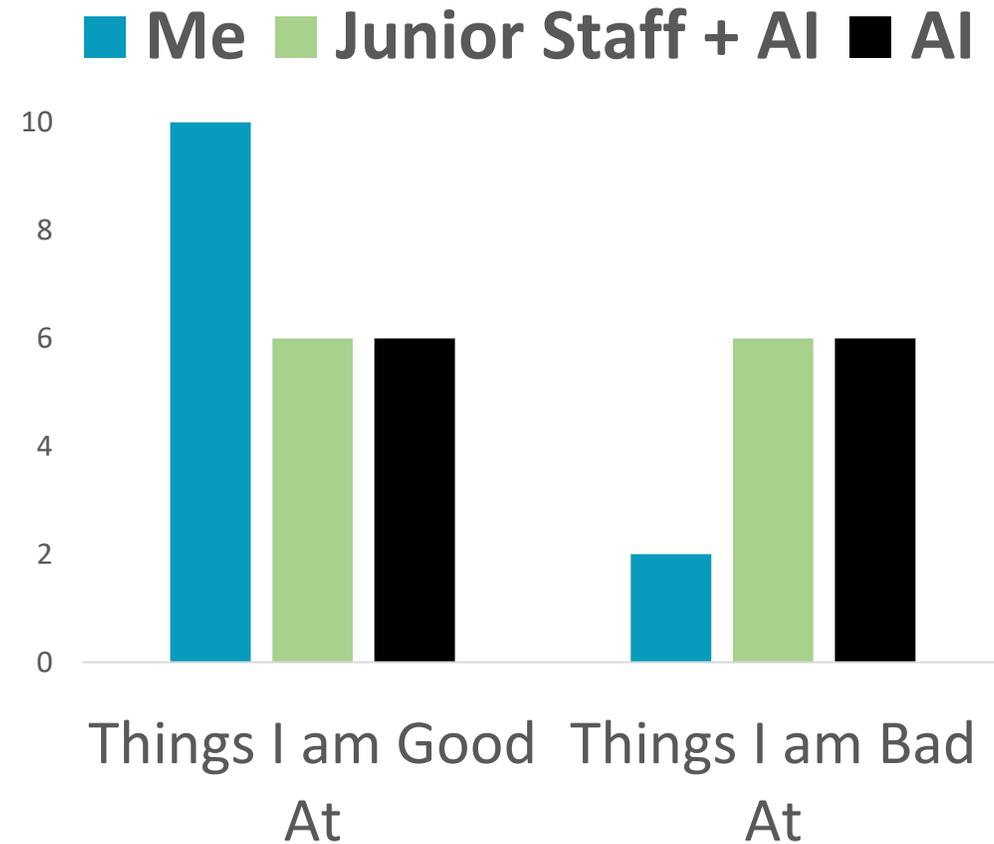
*Use AI for First Drafts that Will
Be Reviewed by Experts*

Don't

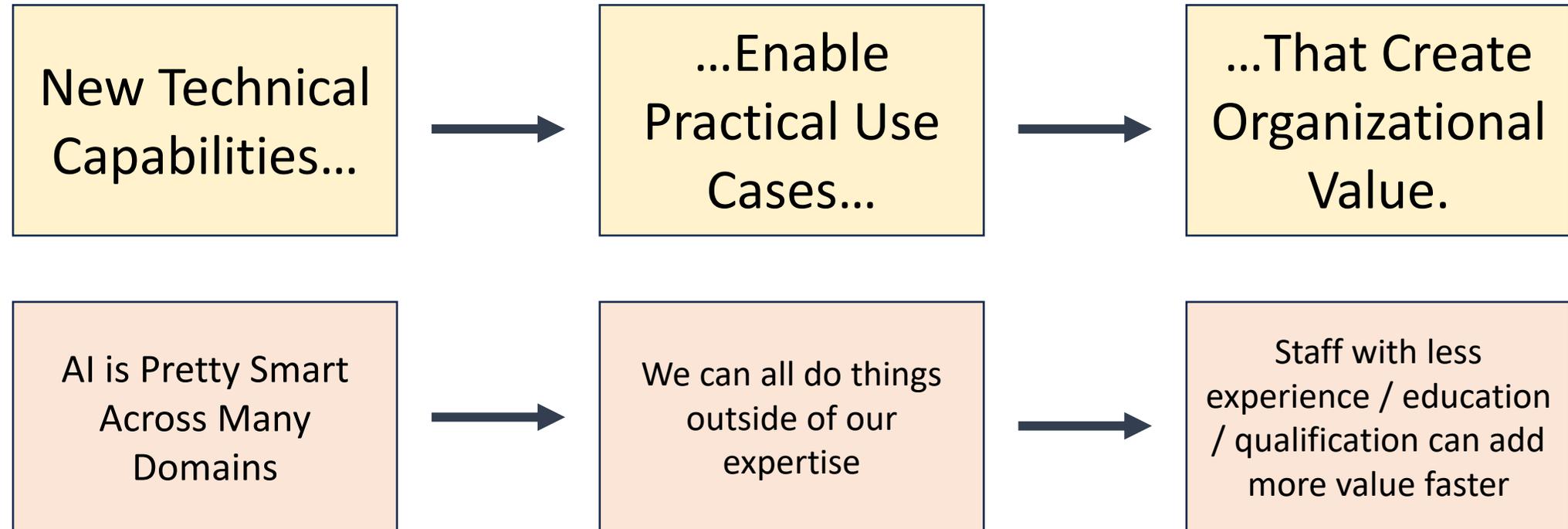
*Use AI When You Need Expert-
Level Content*

*Ask Experts to Use AI in their
Area of Expertise*

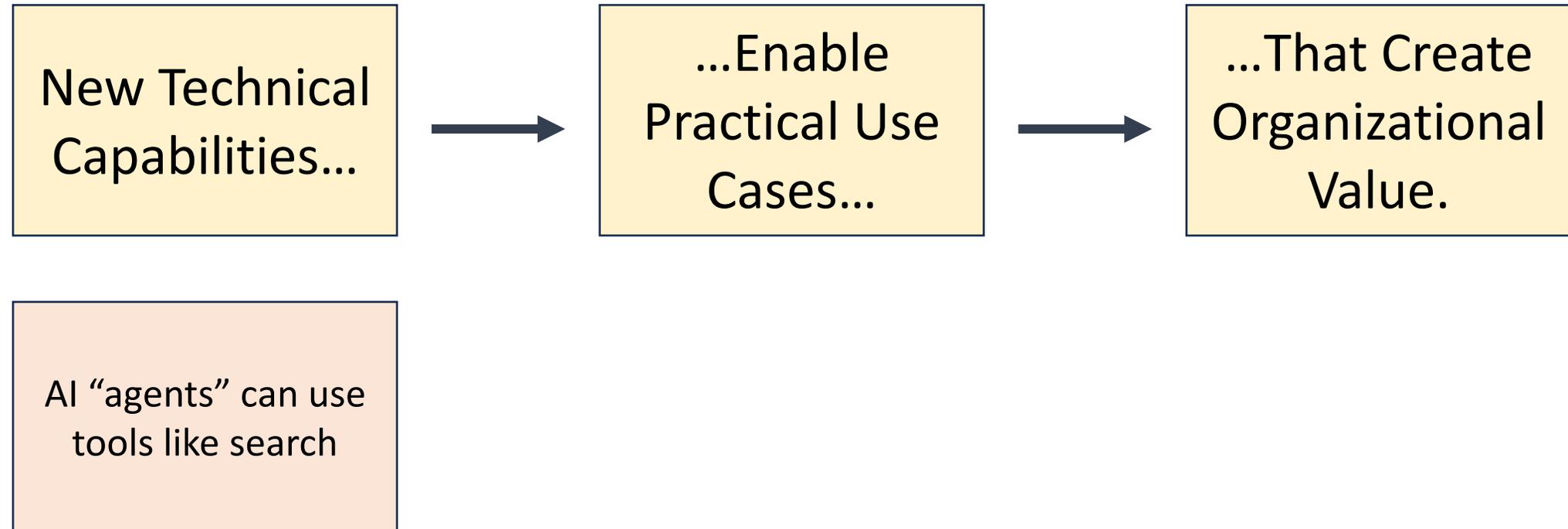
AI Can Be A Floor Raiser *for Everyone*



How Do LLMs Create Value?



How Does AI Create Value?



“Deep Research” Mode is *Very Good*

Got it. I'll design a minimal yet scalable modern data architecture using Azure for your clients, prioritizing open-source tools for data transformation while keeping infrastructure costs manageable. I'll also explore templating strategies to minimize hosting overhead. I'll get back to you with a detailed recommendation.

Research completed in 5m · 21 sources

Minimal Data Architecture for Nonprofits on Azure

Minimal Azure Data Architecture for Small Nonprofits (50–100 Employees)

Goal: Design a cost-effective, batch-oriented data platform on Azure for nonprofits to ingest data from SQL backups and SaaS apps (e.g. Salesforce, QuickBooks Online), transform it with dbt, and orchestrate the process using open-source tools. The solution should minimize licensing costs and comply with security regulations (including HIPAA). Below is a structured recommendation covering **storage**, **pipeline orchestration**, and **infrastructure management** (templating and security best practices).

1. Storage Layer (Data Lake) 📦

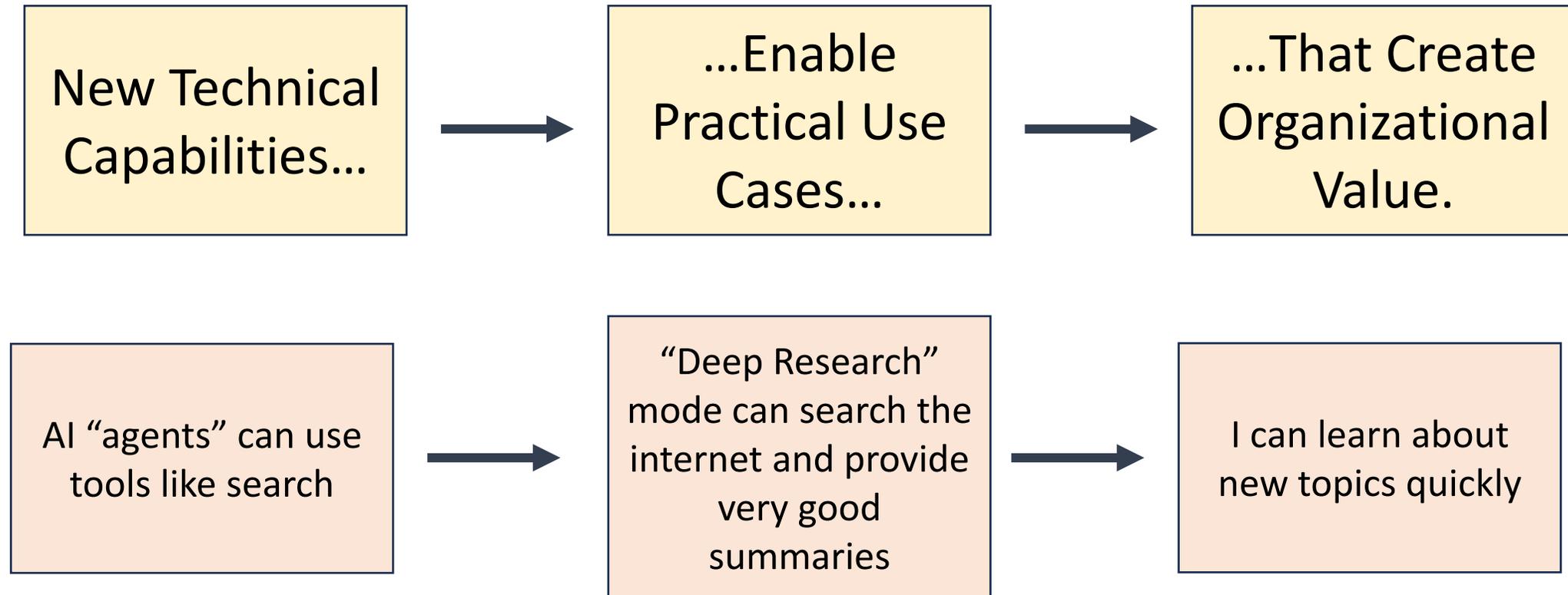
Use Azure Data Lake Storage Gen2 (ADLS) for a **cost-effective data lake**. ADLS Gen2 (built on Azure Blob Storage) provides **scalable, low-cost cloud storage** for **all data formats** (structured or unstructured). It

■ Me ■ Deep Research

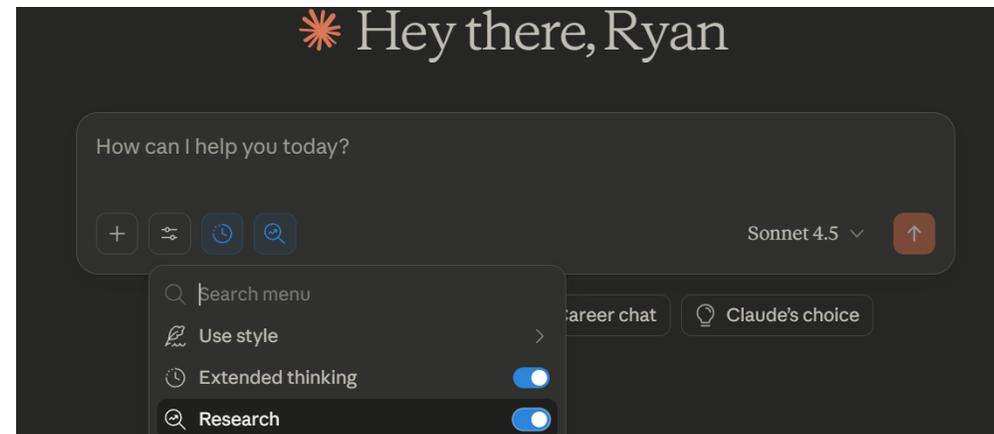
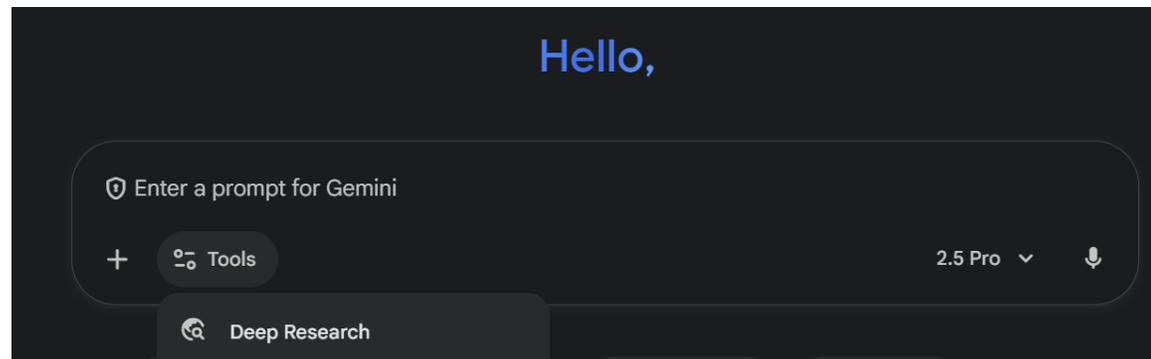
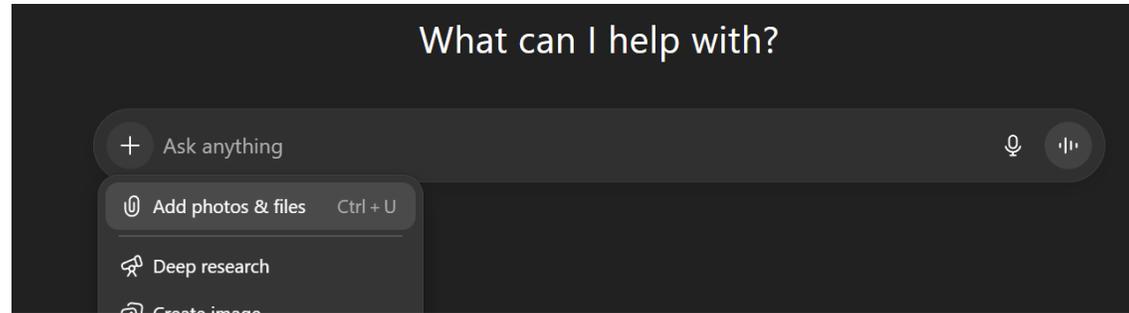


Things I am Good At

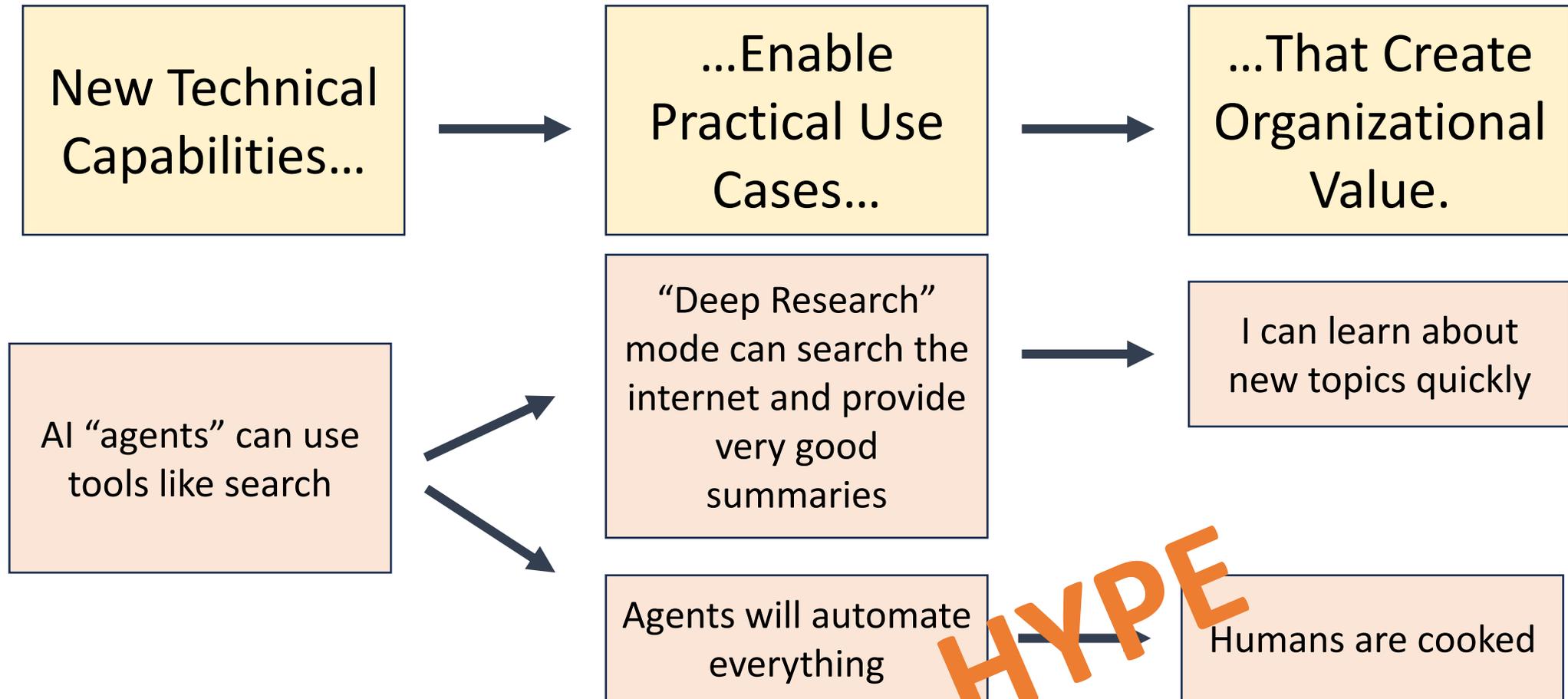
How Does AI Create Value?



Click around to find Deep Research



How Does AI Create Value?



Do

Try “Deep Research”

Don’t

*Expect AI Agents to
automate everything – yet*

Common Privacy Concerns

Can I put confidential data into AI?

Is it safe to use [X] tool?

Nice talk, but I can't use AI with *my* data because AI is not private...



Privacy Isn't Free

Unacceptable Privacy

AI Notetaking Apps (other than Zoom, Microsoft, Google)

Uncertain Privacy

All the AI startups...

Experimental features within big products

Pay for Privacy



Private by Default



A Simple AI Usage Policy is Better than None

Whether you have a policy or not, staff *will* use AI

Different tools are acceptable for different types of data (confidential, PII/PHI)

The process of defining a policy can help define your AI strategy

- Do you want to stay inside your walled garden (Microsoft / Google), or do you prioritize user experience (openai, Anthropic)?



Do

Pay for Privacy

*Have an AI Acceptable Use
Policy*

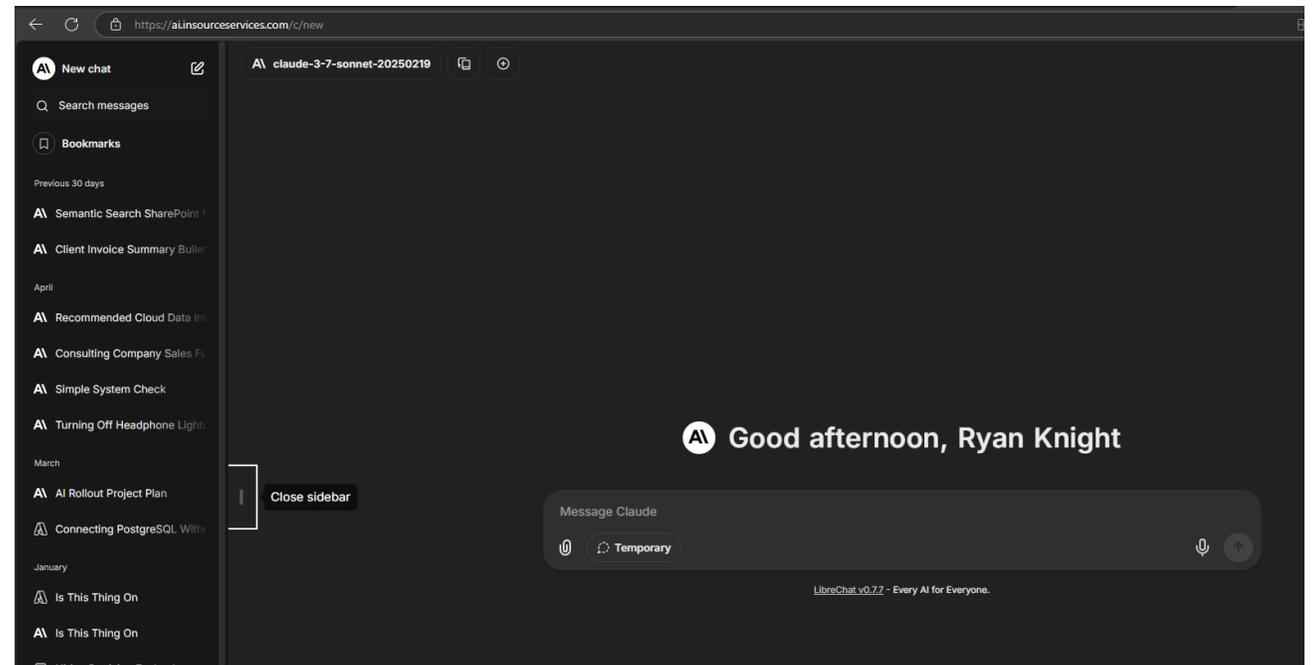
Don't

*Allow staff to use random free
AI startup products –
especially meeting notetakers*

How can I afford AI?

If you are on Google / Gmail:

- You already have AI!
- Gemini is included with your Google Workspace subscription



EFFICIENZA (Artificialis Intelligencia)



IMPORTANT INFORMATION

AI is intended for the automation of nonprofit finance and HR tasks. Common side effects include increased efficiency and accuracy. Possible use cases include, but are not limited to: HR Benefits Summary, Payroll Audit, Recruiting, Invoice Review, Grant Writing, Fraud Detection, Budget Forecasting, Donor Trend Analysis, Cash Flow Prediction, Compliance Monitoring, Expense Reporting, and Policy Review. Consult your IT and legal departments in snaxation. Consult your IT and legal departments before implementation. Not flaw, Compliance Monitoring, Expense Reporting, and Policy Review. Consult your IT and legal depatnents before implementation. Not a substitute for professional judgment. Results may vary based on data quality and organizational readiness. Keep out of reach of outdated systems.

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