

A PRACTICAL FIELD GUIDE FOR NONPROFIT TEAMS

The Nonprofit Workflow Friction Finder

A staff-ready assessment, workflow map, opportunity chart, and 30-day plan for reducing repetitive administrative work.

Improve the work. Keep what already works.



COMPOUND CONSULTING

Workflow improvement and practical AI

Start with what people repeat

Ask the people who do the work to score each statement from 0 to 3. The goal is not a perfect score. It is to find one process worth examining together.

1

The same information is typed into more than one system.

0

1

2

3

2

A process depends on one person remembering every step.

0

1

2

3

3

Staff regularly copy details from email into a spreadsheet or CRM.

0

1

2

3

4

The same document or packet is rebuilt from scratch.

0

1

2

3

5

Follow-up is delayed when the week gets busy.

0

1

2

3

6

Reporting requires gathering numbers from several disconnected places.

0

1

2

3

7

People ask where a file, answer, or current status lives.

0

1

2

3

8

A routine task regularly creates avoidable errors or rework.

0

1

2

3

9

Volunteers or clients receive inconsistent updates.

0

1

2

3

10

Staff maintain a shadow spreadsheet because the main system is incomplete.

0

1

2

3

HOW TO READ THE RESULT

Circle the three highest-scoring statements. Then ask: which one causes the most disruption, touches the most people, and is safe to improve in a small first step?

Put the real process on one page

Map what happens today, including workarounds and exceptions. Do not map the ideal version yet.

TRIGGER

What starts the work?
.....

↓

CAPTURE

Where does the information arrive?
.....

↓

DECIDE

Who reviews it, and what do they check?
.....

↓

MOVE

Where is the information copied or sent?
.....

↓

FOLLOW UP

Who needs an update or reminder?
.....

↓

CLOSE

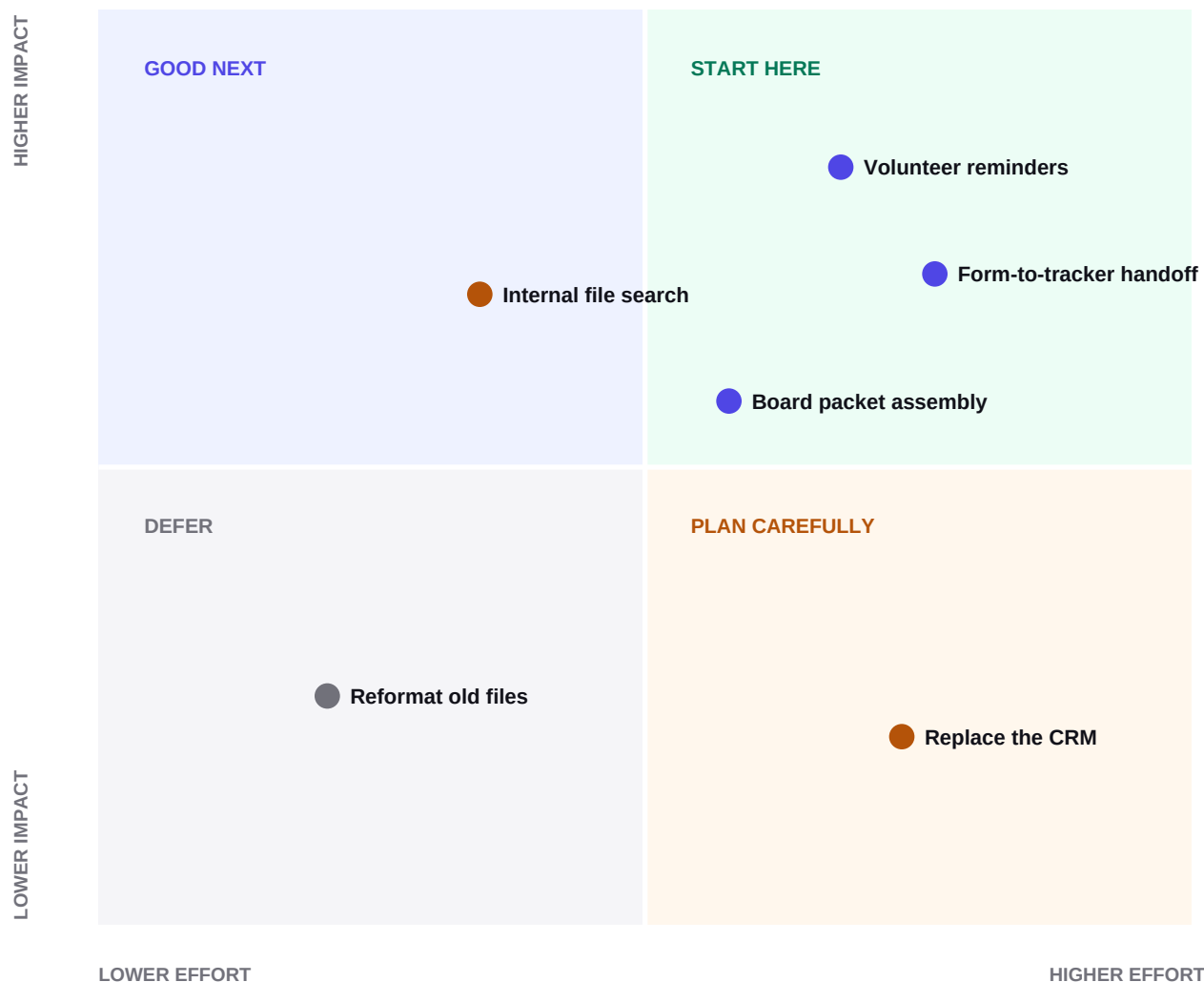
How do you know the work is complete?
.....

LISTEN FOR THESE PHRASES

"Then I copy it..." "If she is out, it waits..." "I keep my own list..." "We usually remember..."

Balance impact with effort

Plot possible improvements before choosing one. The best first project is usually useful, understandable, and small enough to test safely.



Illustrative examples only - place your own opportunities based on staff input.

FOUR QUESTIONS BEFORE YOU AUTOMATE

- | | |
|---|---|
| ☐ Is the current process understood? | ☐ Can staff review exceptions? |
| ☐ Is the information appropriate to use? | ☐ Can you test with one program or team first? |

AI is one tool, not the strategy

Start with the workflow. Then choose the simplest reliable tool for the job.

GOOD FIT

- Drafting routine communications for staff review
- Summarizing long documents
- Extracting structured fields from consistent forms
- Searching approved internal materials
- Categorizing incoming requests

USE CARE

- Sensitive client or member information
- Eligibility, safety, or benefit decisions
- Messages that require professional judgment
- Unverified facts or external research
- Tasks with no clear human reviewer

A SIMPLE REVIEW RULE

If the output affects a person, a payment, eligibility, safety, privacy, or the organization's public voice, a named staff member should review it before it goes anywhere.

Technology should reduce administrative friction without reducing accountability.

KEEP THIS PRINCIPLE

Your staff knows the organization. The system should support their judgment, not replace it.

A practical 30-day plan

Use this plan to move from a vague frustration to a tested improvement without launching a major technology project.

WEEK 1

Observe

Choose one workflow. Ask two people who do it to map the real steps, delays, workarounds, and exceptions.

WEEK 2

Prioritize

Define one measurable goal, such as fewer handoffs, less retyping, clearer status, or faster staff review.

WEEK 3

Test

Try the smallest safe improvement with one team, one program, or a limited set of records.

WEEK 4

Review

Ask what became easier, what broke, and what still needs human judgment. Keep, adjust, or stop.

WANT A SECOND SET OF EYES?

Schedule a free nonprofit workflow review

Bring one frustrating workflow. Leave with a clearer sense of what is worth fixing first.

compoundconsulting.ai/nonprofits/start

START THE REVIEW