

Practical Uses of AI in the Workplace

Shawn Sweigart

DESIGN DATA
TECHNOLOGY PARTNERS



The Human Element

Great AI strategy begins with the people who know the mission best.

More **Human**.
More **Capacity**.
More **Mission**.

 **Design Data**
Technology Partners

Since 1984, helping **Nonprofit Organizations** with the IT Support & Advising they need.

Help Desk Support

Budget Management

Cybersecurity

Exec. Board Reports

M365/Google Admin

IT Documentation

Advising Services

Much More...

The AI Questions we hear Everyday

How can AI save me
time each week?

What **AI Tools** are the best for my
nonprofit?

What AI **training** does my
nonprofit need?

How do I write great **prompts**
in AI?

Are free versions of AI **safe** to
use in my organization?

I am afraid of **missing out**,
what do I need to know?

It Depends

The AI Landscape is
filled with many
Shiny Things





Automation & Agents



Make



n8n



Lovable



Power Automate



Research & Search



Notebook LM



Perplexity



Consensus



Elicit



Fundraising & CRM AI



DonorSearch AI



Salesforce Agentforce



Hubspot AI



Microsoft Dynamics 365 Copilot



General AI Assistants



Microsoft 365 Copilot



Claude



Chat GPT



Gemini



Grant & Proposal Support



Candid



Gratefully



Grantable



Submittable AI



Design & Presentations



Canva



Gamma



Beautiful.ai



ElevenLabs



Chatbots & Support



Drift



Zendesk AI



Intercom Fin



Ada



Meeting & Note Transcription



Otter.ai



Fathom



Fireflies.ai



Plaud



Data & Analytics



Tableau Pulse



Domo AI



Power BI Copilot



ThoughtSpot



Writing & Communications



Copy.ai



Grammarly



Jasper



Writer



ChatGPT

OPENAI

BEST FOR

**All-around thinking
& creation.**



Brainstorming & writing



Data / file analysis



Deep research & visual creation



Microsoft Copilot

MICROSOFT

BEST FOR

**Work inside
Microsoft 365.**



Teams & Outlook



Word / Excel / PowerPoint



Answers grounded in your organizational work data



GOOGLE

BEST FOR

**Google ecosystem
& multimodal work.**



Gmail / Drive / Docs / Sheets / Slides



Long-context analysis



Images, video and connected Google workflows

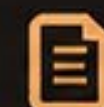


Claude

ANTHROPIC

BEST FOR

**Complex reasoning,
coding & long-form
work.**



Large documents and complex materials

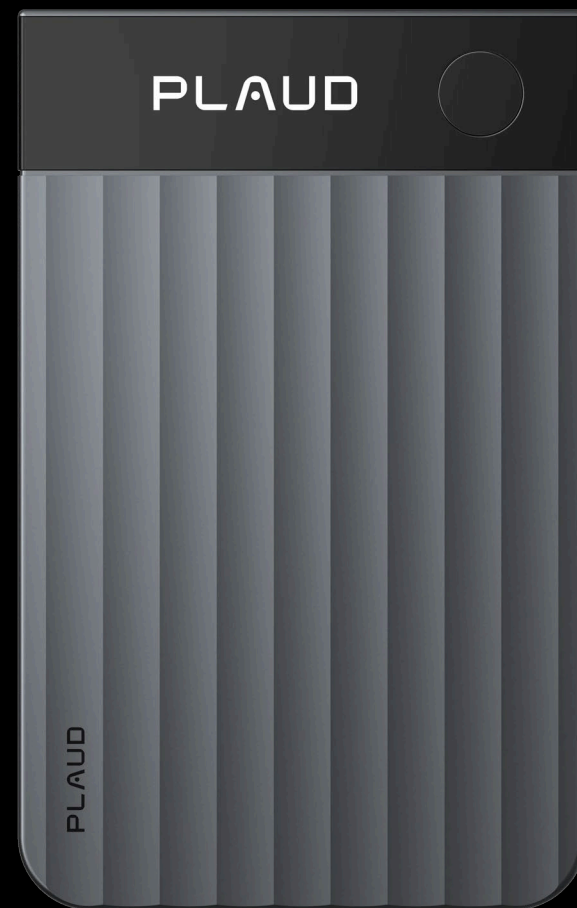


Professional writing with nuance



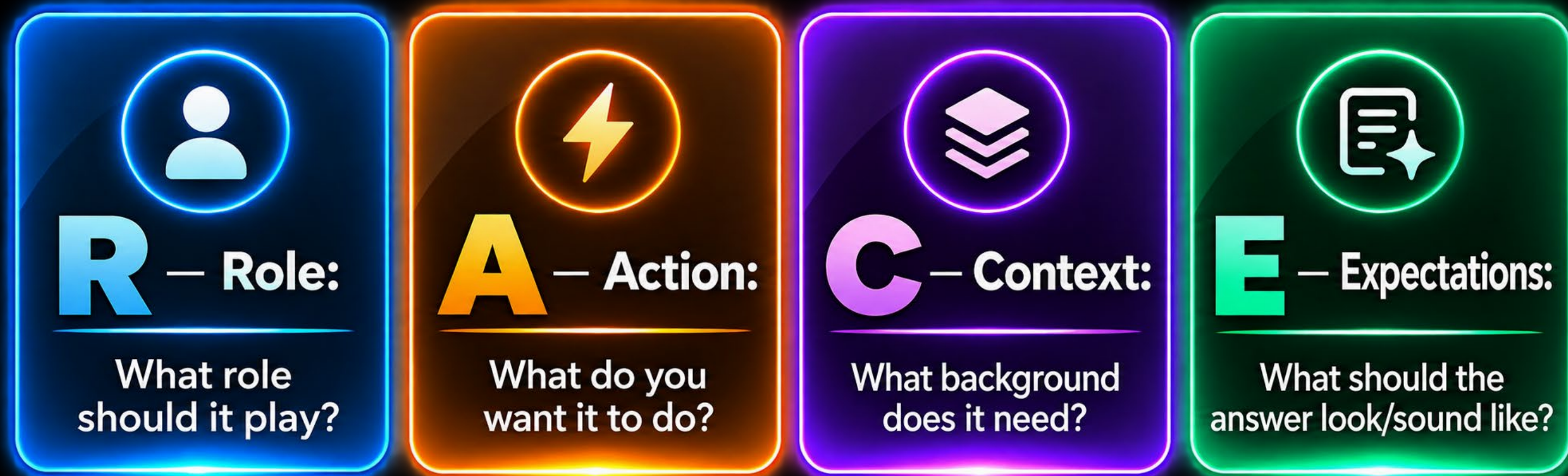
Coding and sustained knowledge-work tasks

How Design Data uses **Plaud AI** to help **transcribe** in-person meetings



PLAUD

Explain best practices on how to **prompt AI** to get better results



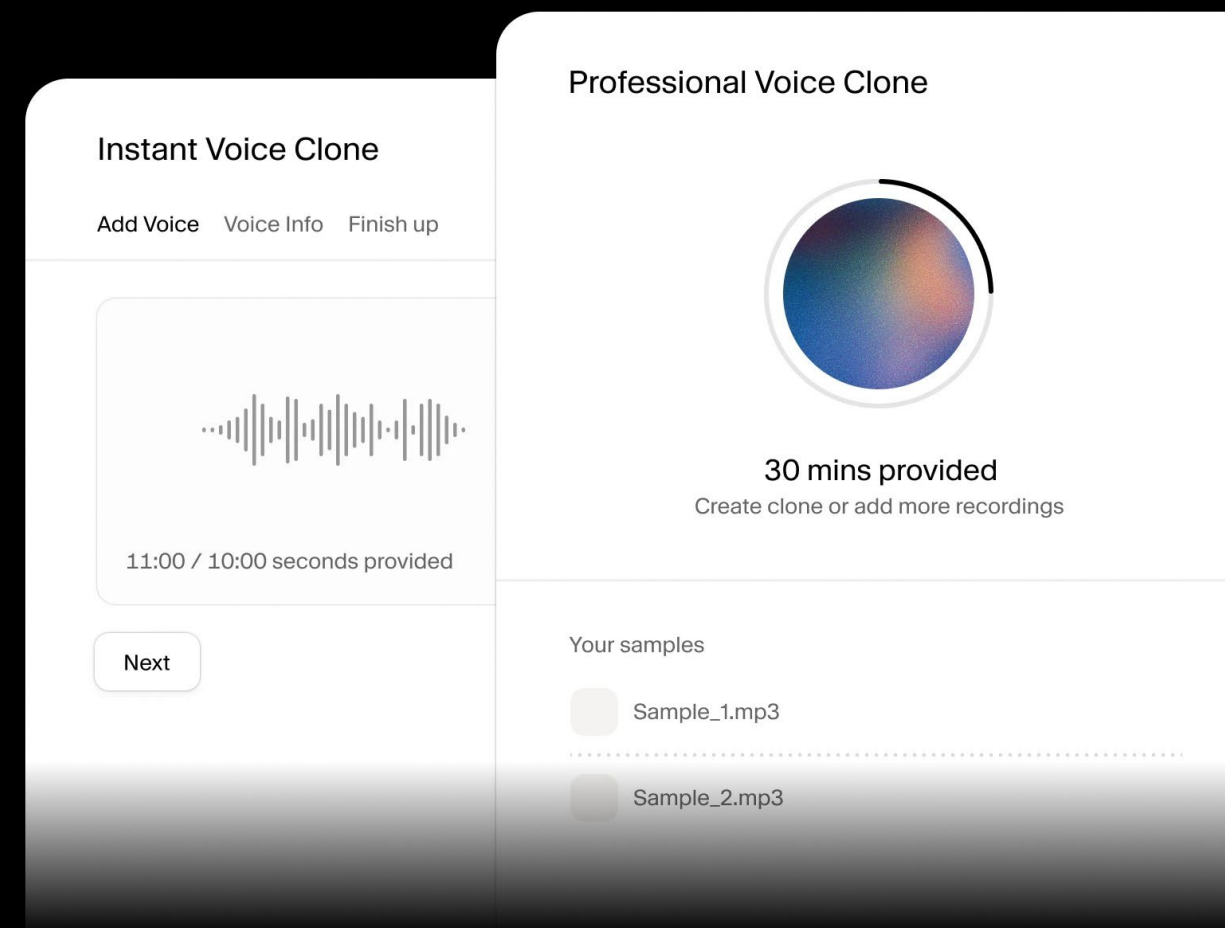
Explain the importance of having an **AI Policy** for your Organization

SANS



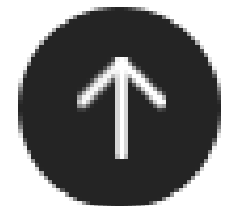
Demonstrate how some nonprofits are using **AI voice cloning**

**Eleven
Labs**



Explain the importance of identifying
sensitive data before adopting AI

+ Show me payroll information





AI is everywhere. Impact is not.

92%

of nonprofits report
using AI in some capacity

7%

report major improvements
in mission impact

**So the problem is not adoption.
The problem is alignment.**

AI Isn't the Advantage Your People Are.

Before we choose the tool, we should help our teams understand where they create the most **value** within the organization.



- Judgment
- Trust
- Creativity
- Empathy
- Connection

Intentional AI

THE DISCOVERY PHASE 1 **The Intentional AI Approach**
UNDERSTAND YOUR WORK BEFORE YOU BRING IN AI.

PEOPLE
IDEAS
TECHNOLOGY
A BRIGHTER
TOMORROW

A **If I Had More Capacity...**
Where would you spend more time?
Where would you invest it if you were able to create more time in your week, your team, and your community?
to make the biggest difference for your organization, your team, and your community?

B **Where is your Human Advantage?**
Where do you make the biggest difference? Think about the work that benefits from your judgment, relationships, leadership, creativity, empathy, and context.

C **Where is your Friction?**
Where does your time go? Think about a normal week. Where does your time disappear? Use the prompts below to help you identify tasks that may be good candidates for AI.

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GO TO QUESTIONS
What questions, requests, or process help do people regularly come to me for?

CONNECTION
Where do trust, relationships, or empathy matter most?

LEADERSHIP
Where do I need to set direction, solve ambiguity, or create something new?

JUDGMENT
Where do my experience, context, or decisions change the outcome?

REAL WORK. REAL INSIGHTS. REAL OPPORTUNITIES.

BLANK PAGE
Where do I repeatedly create a first draft from scratch?

EVALUATION PHASE 2 **Evaluate the Work**
NOW TAKE THE TASKS YOU IDENTIFIED AND ASK TWO SIMPLE QUESTIONS.

PEOPLE
IDEAS
TOOLS
A BRIGHTER
TOMORROW

1 **Start with one task.**
Pick one item from your Find the Friction list.

2 **How much time does it take?**
Does this task take a lot of your time or energy?

3 **How much does it need me?**
How much of this task requires your judgment, relationships, leadership, creativity, empathy, or context?

LET AI DO MORE
High time. Lower need for your judgment.

LET AI HELP
High time. Higher need for your judgment.

LEAVE IT ALONE
Low time. Lower need for your judgment.

KEEP IT HUMAN
Low time. Higher need for your judgment.

Top AI Opportunities
List your top 3 tasks where AI could help create time back.

#	Task	How AI Could Help	Possible Monthly Time Savings
1			
2			
3			

INTENTIONAL IT. A BRIGHTER TOMORROW.

DesignData Technology Partners

Scan to Download Worksheet

Develop an AI strategy that keeps
people at the center.

1. What would you do with more **Capacity**?

The goal is not more technology. The goal is more room for people to do the work that creates human impact.



Mission Impact



Team Growth



Community

2. Where is your Human Advantage?

The goal is to find where people create the most value. Where do you make the biggest difference?



Connections



Leadership



Judgment

3. Where is your Friction?

Where does your time go? Think about a normal week. Use these prompts to identify tasks that may be strong candidates for AI support.



Repeat / Admin



Time



Blank Page



Research / Organizing



Go To Questions

4. What tasks have great AI Potential?

Next, turn your attention to finding tasks that are best suited for AI to help provide more capacity.



How much Time does it Take?



How much does it need Me?



Managers are becoming Search Engines.

- “How do I do this?”
- “Is there a policy for that?”
- “Is there a training video?”
- “How do I reserve the Van?”
- “What is the PC recycling process?”



High time



Needs me
a little

Use Copilot and SharePoint to create an Agent.



Agent Builder

DescribeConfigurePreview

+

...

 **New Agent** 

Describe your agent

Auto ▾

Instructions ⓘ

99 Suggest improvements 

Describe what this agent should do, define its tone, and outline any rules or guidelines it must follow

Knowledge ⓘ

99 Suggest improvements 

Focus your agent by adding specific knowledge sources

+ Add knowledge

 or just drop files here

 **Client Experience Helper**

Created by Shawn E. Sweigart

+ how to recycle a computer

 **Client Experience Helper**

At Design Data, the hardware recycling process depends on the type of equipment being retired. The current process is documented in [Design Data Corporation - GLOBAL - Hardware Recycle Process - 2026-07-24 13.14.](#) 

For Computers, Laptops, Servers, and Devices with Storage

These items are placed on the **Tech Shelves** in the **Humidity Room**. This includes:

- Desktop PCs
- Laptops
- Servers
- MacBooks

Completing a “Tech Check” can take **hours** to complete.

Quarterly, we meet with our partners to review progress, best practices, roadmaps, etc.

These TechChecks result in **action items, notes** and **tasks** that we cannot forget.

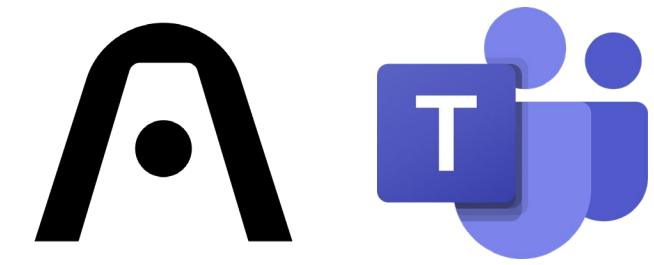


High time



Needs me
a little

Use Plaud & Teams for transcript and action items.



Microsoft Teams interface showing a meeting titled "Product roadmap discussion" on Jan 21, 2023, 10:00 - 11:00. The meeting content displays a "Product roadmap" slide with a timeline from Month 1 to Month 12, detailing phases like Market Research, Development, Phase 1, Phase 2 + Testing, and Launch. The right sidebar shows "Content" (Product Roadmap..., Marketing budget..., Marketing demo...) and "Notes" (AI notes, Mentions (3), Transcript, Chat). Below the notes, "Suggested notes" and "Suggested tasks" are listed. The bottom of the interface shows a gallery of thumbnails for the meeting content, including "Product roadmap review", "Agenda", "Our vision", "New product roadmap", and "Product goal".

Mobile app interface showing a meeting summary for "Group plans December trip to New York City, discussing accommodations, activities, and logistics for 13+ attendees." The summary includes a "Meeting Summary" section with a paragraph about the trip plans and a "Tasks" section with a list of action items:

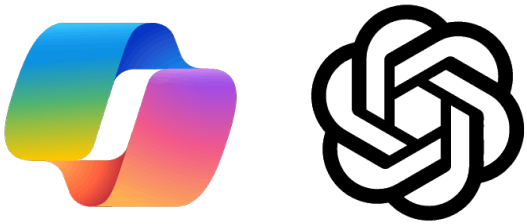
- Review and book hotel options in Manhattan (All team members)
- Add planned activities to Wanderlog app (All team members)
- Look into Broadway show options
- Research comedy club options
- Investigate Peak Restaurant reservations

Technical **Proposals** are not always “**Client Ready**”.

- We love Acronyms
- Engineers can speak a different language
- Quoting custom projects can be complex
- Can't afford to miss any steps



Use ChatGPT & Copilot to help create proposals.



All Notes124

Recent12

Starred8

Shared6

Trash3

Engineering

Infrastructure

Server Builds

Network

Migration Projects

Documentation

Runbooks

Operations

Monitoring

Incident Notes

Change Management

Teams

IT Operations

Systems

Security

Meetings

New note

Today

Server Migration Notes – File ...
2m ago

DNS Change Plan
1h ago

Share Permissions Review
3h ago

Cutover Checklist
5h ago

Yesterday

FS-NEW-01 Build Notes
Yesterday

Migration Communications
Yesterday

Application Dependencies
Yesterday

This Week

Storage Expansion Plan
Tue

Backup Verification Steps
Mon

Network Diagram Updates
Mon

User Announcement Draft
Mon

Server Migration Notes – File Server Cutover

Engineer: M. Carter | Change Window: Sat 10:00 PM – Sun 2:00 AM

Edited 2m ago

Share

...

1. Project Overview

Migrate existing file server (FS-OLD-01) to new hardware (FS-NEW-01) running Windows Server 2022. Objective is to move all file shares, preserve permissions, and minimize downtime. Target downtime < 1 hour.

2. Environment

- Domain: CORP.LOCAL
- Site: Main Office (Primary Datacenter)
- Clients: ~350 users
- File Server Role: SMB file shares, home directories, department shares
- Other Dependencies: DFS namespace, backup jobs, monitoring, AV exclusion

3. Source Server / Destination Server

Property	Source (FS-OLD-01)	Destination (FS-NEW-01)
Hostname	FS-OLD-01	FS-NEW-01
IP Address	10.10.20.15	10.10.20.25
OS Version	Windows Server 2016 (1607)	Windows Server 2022 (21H2)
Hardware	VM (legacy cluster)	New VM (cluster 2)
Storage	1.2 TB (3 x 400 GB)	2 TB (4 x 500 GB)
File Shares	12 shares (see list below)	Same (migrate all)
Backup	Included in nightly backup	Will be added after cutover
AV	Excluded paths in place	Reapply exclusions
Monitoring	Yes (agent installed)	Install after migration

Current Shares on FS-OLD-01:

- \\FS-OLD-01\Departments
- \\FS-OLD-01\HR
- \\FS-OLD-01\Finance
- \\FS-OLD-01\IT
- \\FS-OLD-01\Projects
- \\FS-OLD-01\Shared

(Total: 12 shares – see full list in attached inventory)

7. Validation / Post-Cutover Checks

☐ Confirm clients can access all shares

☐ Verify file permissions (spot check multiple departments)

☐ Test create / modify / delete files

☐ Check open file count and session utilization

☐ Confirm DFS links (if used)

☐ Review event logs for SMB / access errors

☐ Verify backup job runs successfully

☐ Monitor for user feedback (first 24 hours)

8. Rollback Plan

- If critical issue, revert DNS A record to original IP (10.10.20.15).
- Re-enable access on FS-OLD-01 (ensure data is in sync if changes were made).
- Keep FS-OLD-01 online and unchanged for 48 hours post-cutover.
- Snapshot of FS-OLD-01 taken before migration (ref: SNAP-2024-11-16).
- Document any changes made during cutover for rollback.

9. Open Questions / Risks

- Large files currently in use – may not copy (need to close if possible).
- Any hardcoded UNC paths outside of DFS?
- Will any applications be impacted (e.g., accounting system)?
- Confirm backup window does not conflict with cutover.
- Risk of longer downtime if data copy takes more than expected.
- Need confirmation from department leads on communication timing.

10. Action Items

Task	Owner	Due Date	Status	Notes
Add FS-NEW-01 to backup jobs	M. Carter	Pre-cutover	Pending	Include all shares
Install monitoring agent	M. Carter	Pre-cutover	Pending	Same config as FS-OLD-01
Send user notification	IT Comms	Fri 11/15	Pending	Email + Teams
Perform cutover	M. Carter	Sat 11/16	Not Started	During change window
Post-cutover review	M. Carter	Sun 11/17	Not Started	Monitor for 24-48 hours

4. Pre-Migration Checklist

☒ Confirm FS-NEW-01 build completed and patched

Completed

☒ Verify storage allocated and formatted (2 TB)

Completed

☒ Install required roles and features (File Server, SMB)

Completed

☒ Reapply AV exclusions

Completed

☐ Verify backup jobs (add FS-NEW-01 after cutover)

Pending

☐ Confirm monitoring agent installation

Pending

☐ Review and document current share permissions

Pending

☐ Notify users (email + Teams message)

Pending

☐ Final pre-cutover snapshot of FS-OLD-01

Pending

5. Migration Steps

- Take final backup of FS-OLD-01 (confirm successful).
- Disable users' access (set share to read-only or notify users).
- Use robocopy to mirror shares to FS-NEW-01.

robocopy \\FS-OLD-01\Departments \\FS-NEW-01\Departments /MIR /COPYALL /R:3 /N:5 /LOG:C:\Logs\Departments.log

- Verify data and permissions on FS-NEW-01.
- Update DNS (see section 6).
- Set shares to read/write.
- Monitor for issues during initial client reconnection.

6. DNS / Network Changes

- Update DNS A record for FS-OLD-01 to point to new IP:
 - Current: 10.10.20.15
 - New: 10.10.20.25
- TTL: Reduce to 5 minutes (set 1 hour before cutover).
- Verify DFS namespace (\\corp.local\shares) if applicable.
- Check firewall rules (no changes expected).

Note: No hostname change. FS-OLD-01 name will remain the same, pointing to new server.

PROPOSAL

Server Migration Project

MODERN | SECURE | RELIABLE | READY FOR WHAT'S NEXT

PREPARED FOR

Your Organization

September 29, 2026

Thank you for the opportunity to provide this proposal. This document outlines our recommended approach, scope, timeline, and investment to successfully migrate your servers to a modern, secure, and reliable environment.

OUR COMMITMENT

We exist to help organizations like yours use technology with confidence so you can focus on your mission. Our team brings deep technical expertise, a proven process, and a commitment to a smooth, low-risk migration experience.

Project Overview

This project will migrate your existing on-premises servers to a modern platform, ensuring improved security, reliability, and performance while minimizing downtime and disruption to your team.

KEY OUTCOMES

Improved Security

Increased Reliability

Better Performance

Foundation for Future Growth

OUR APPROACH

1 Plan

Assess, design, and prepare for a smooth migration.

2 Migrate

Execute the migration with minimal disruption.

3 Validate

Confirm functionality, performance, and security.

4 Optimize

Finalize, document, and ensure long-term success.

SCOPE OF SERVICES

Project Planning & Design

Review current environment, confirm requirements, and create a detailed plan.

Server Migration

Migrate roles, data, and services to the new environment.

Application & Service Validation

Test critical systems to ensure proper functionality.

Security & Access Configuration

Implement security best practices and validate access.

Documentation & Knowledge Transfer

Update documentation and provide handoff training.

Post-Migration Support

Ensure a successful transition and address any issues.

ESTIMATED TIMELINE

4 – 6 Weeks

Timeline may vary based on final scope and availability.

INVESTMENT ESTIMATE

\$\$\$,XXX

Final pricing will be confirmed after detailed planning.

NEXT STEPS

1

Review and discuss this proposal.

2

Finalize scope and timeline.

3

Execute Statement of Work.

Build your AI strategy
around what makes
your organization
great...

Your People

The Human Element

Thank You!!

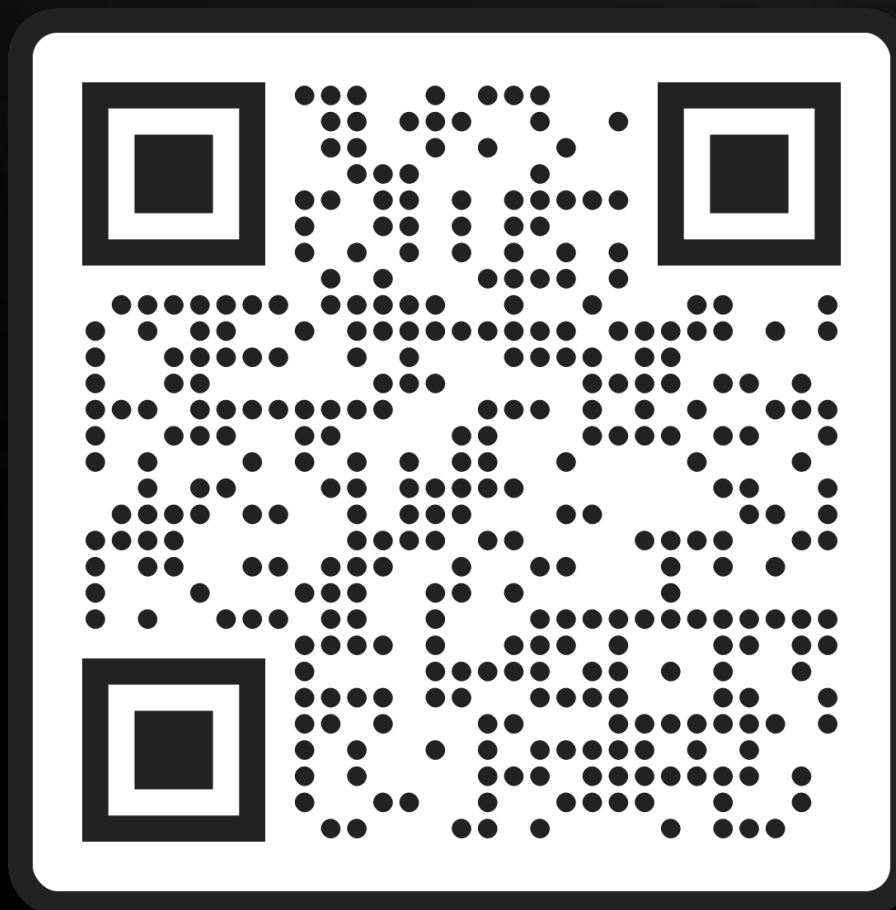
Shawn Sweigart

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ssweigart@DesignDataCorp.com

 **Design Data**
Technology Partners

Intentional AI



Intentional AI Handout

THE DISCOVERY PHASE 1

The Intentional AI Approach

UNDERSTAND YOUR WORK BEFORE YOU BRING IN AI.

PEOPLE IDEAS TECHNOLOGY A BRIGHTER TOMORROW

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REAL WORK. REAL INSIGHTS. REAL OPPORTUNITIES.

EVALUATION PHASE 2

Evaluate the Work

NOW TAKE THE TASKS YOU IDENTIFIED AND ASK TWO SIMPLE QUESTIONS.

PEOPLE IDEAS TOOLS A BRIGHTER TOMORROW

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START YOUR EXPERIMENT HERE.

USE AI AROUND YOUR VALUE.

NOT EVERYTHING NEEDS AN AI SOLUTION.

THIS IS WHERE YOU MAKE THE DIFFERENCE.

Top AI Opportunities
List your top 3 tasks where AI could help create time back.

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