



# AI – Rise of the Machines. And Cake.

15 November 2023





# Making Digital Real

- We are a **specialist** information systems consultancy
- We only work with **charities**, associations, trusts and others in the not-for-profit sector
- We are completely **supplier-independent**
- Our consultants have held **senior** positions in a broad range of different organisations
- Our advice and guidance is based on **practical experience** gained over many years

# Depth and breadth



Digital, Data & Technology Strategies



Reviews & Health Checks



Business Processes & System Requirements



Supplier & Solution Selection



Interim Technical Leadership



Programme & Project Management



Risk, Compliance, Data Protection & Security



Governance & Business Cases



Change & Organisational Development

# Our Mission and Purpose

## Our Mission

We **empower** organisations to deliver transformational impact through more effective use of technology and ways of working

# From our minds...

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## Our Purpose

From **our minds to your minds** – our team of experienced, independent consultants work with you to transfer their knowledge, share their expertise, and **develop your organisational capability**

# ...to your minds

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The three laws of today's  
session on AI



**Do not scaremonger**





**Do not scaremonger**

**Do focus on our sector**



**Do not scaremonger**

**Do focus on our sector**

**Do focus on key questions**



**Do not scaremonger**

**Do focus on our sector**

**Do focus on key questions**

- AI – does it really matter?
- AI – what are the use cases for the sector?
- AI – where do you find it, what does it do?
- AI – what are the ethical and moral risks?



**FIRE**

**BREAK GLASS**



**PRESS HERE**

# Programme

- 14:00      Arrival and welcome
- 14:10      AI – the future, the past, what it means, **what is AI and more importantly what it is not. What are the latest AI predictions. The journey to AI adoption.**
- 14.30      So why the recent hype? **Generative AI and what makes this different to Machine Learning**
- 14:45      Discussion; **thoughts on how this could be used**
- 15:00      Break for Cake
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Session 1: Microsoft + quick Q/A  
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**What were people saying about the last 'big thing' in computing?**



**What were people saying about the last 'big thing' in computing?**

PAXMAN: When you think then...



**Will AI have a similarly profound impact on our society, our economies, our non-profit organisations – and ourselves?**





PeyGen

# A brief history of AI



## What is AI

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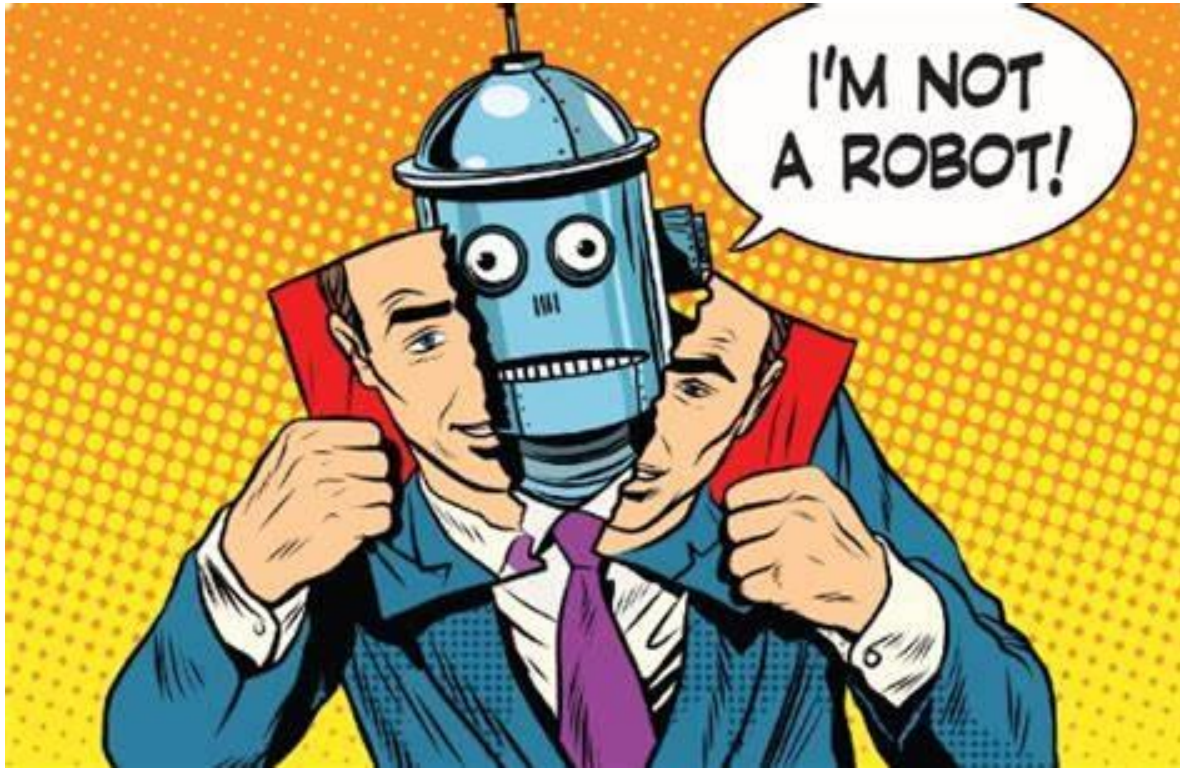
**Artificial intelligence** (AI) is a field of computer science that focuses on creating machines that can perform tasks that would normally require human intelligence. This includes tasks such as visual perception, speech recognition, decision-making, and language translation.

**AI** is becoming more and more advanced, and it is already a part of our daily lives. For example, personal electronic devices like phones and tablets use AI to learn more about us and the things we like. Entertainment services like Netflix use AI to understand what we like to watch and recommend other shows based on what they learn. Home assistants like Alexa and Siri also rely on AI.



# WHAT IS A.I.?

## What isn't it

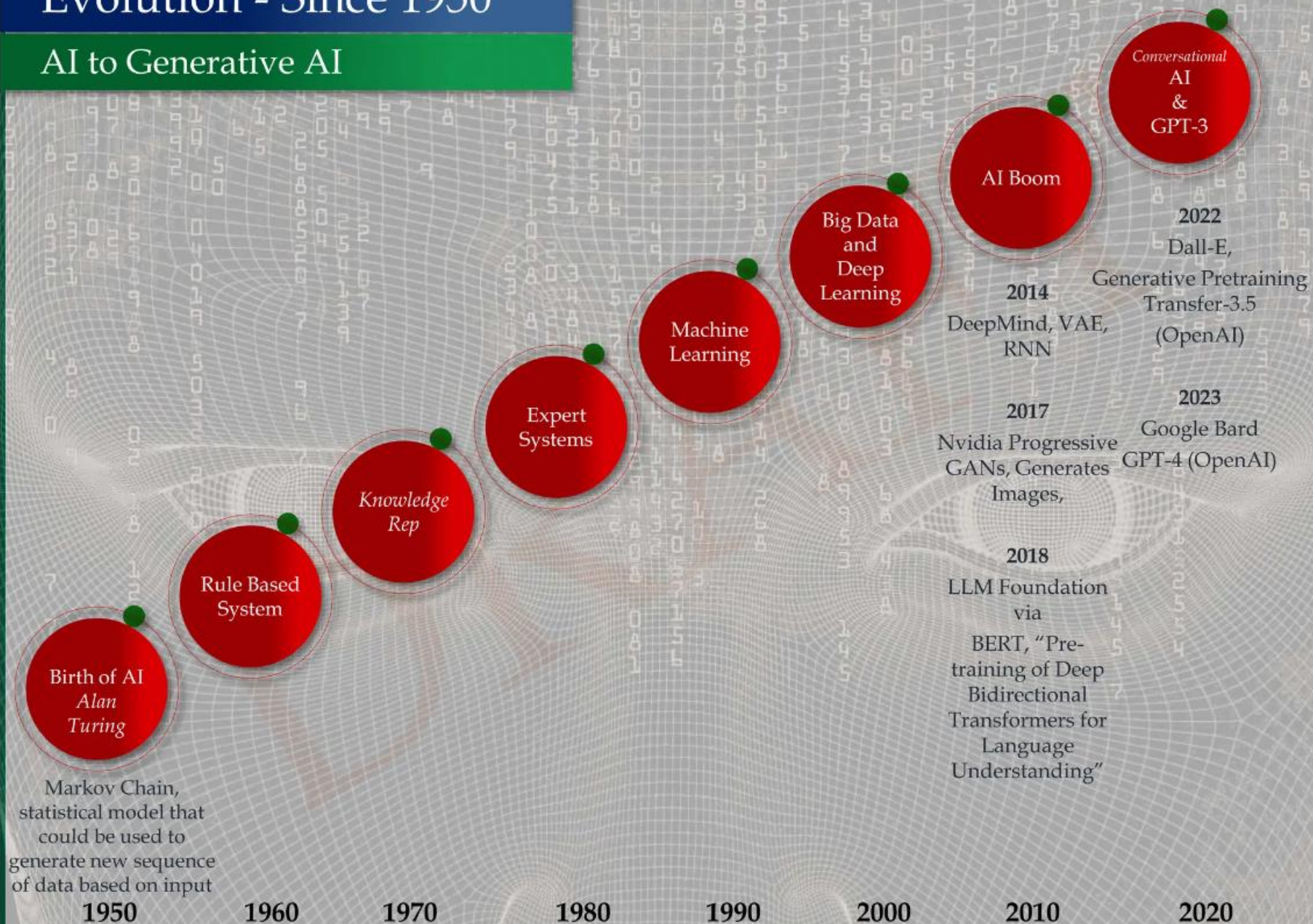


“AI is not intelligence—it is prediction. With large language models, we’ve seen an increase in the machine’s ability to accurately predict and execute a desired outcome. But it would be a mistake to equate this to human intelligence.

“The exaggerations about AI’s potential largely stem from misunderstandings about what AI can actually do. We still see many AI-powered machines that consistently hallucinate, which means they make a lot of errors. So, the idea that this type of AI will replace human intelligence is unlikely.

# Evolution - Since 1950

## AI to Generative AI



# Augmented Intelligence (IA)

Feature	Artificial Intelligence (AI)	Augmented Intelligence (IA)
Purpose	Mimic human cognitive functions	Enhance human intelligence
Role	Independent decision-making	Collaborative decision-making
Human interaction	Minimal or no human interaction	Requires human involvement
Focus	Automation and autonomy	Human-AI collaboration
Examples	Self-driving cars, facial recognition software	Virtual assistants, AI-powered medical diagnosis tools



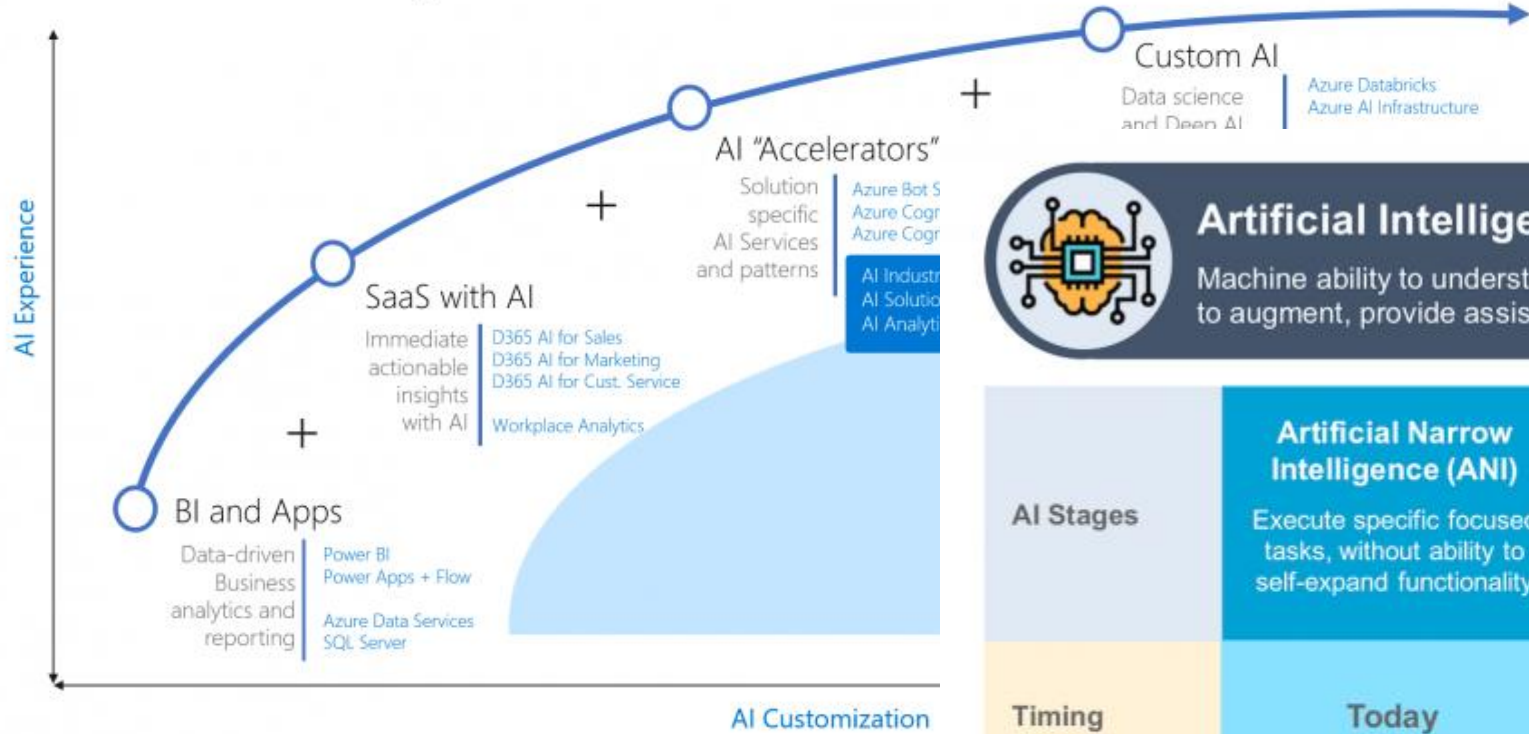
# Large Language Models





# The journey to AI capabilities

## The AI Journey – Where to Start



### Artificial Intelligence

Machine ability to understand, learn, and act on information and events, designed to augment, provide assistance to or perform tasks independently from humans

<b>AI Stages</b>	<b>Artificial Narrow Intelligence (ANI)</b> Execute specific focused tasks, without ability to self-expand functionality	<b>Artificial General Intelligence (AGI)</b> Perform broad tasks, reason, and improve capabilities comparable to humans	<b>Artificial Super Intelligence (ASI)</b> Demonstrate intelligence beyond human capabilities
<b>Timing</b>	Today	About 2040?	Soon after AGI
<b>Implications</b>	Outperform humans in specific repetitive functions, such as driving, medical diagnosis and financial advice	Compete with humans across all endeavors, such as earning university degrees and convincing humans that it is human	Outperform humans, helping to achieve societal objectives or threatening human race

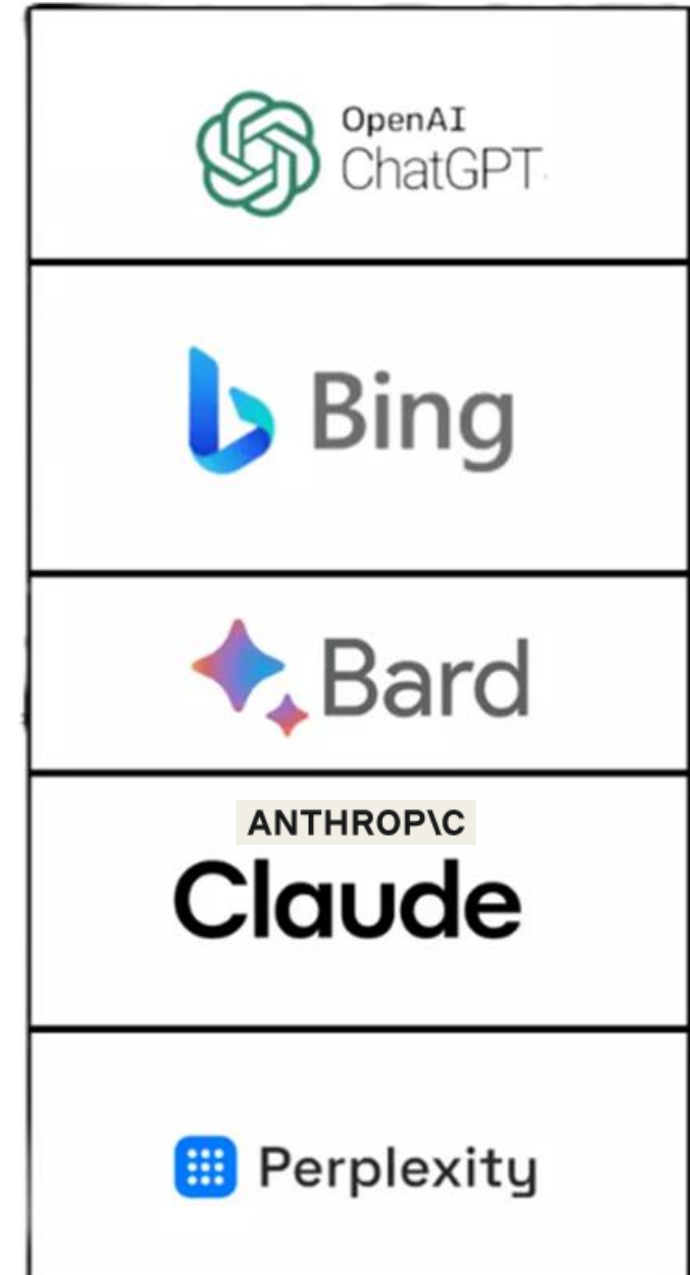
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# Consumer Generative AI Products

They are all conversational tools that are designed to **Generate Content**

They are the same but different. The key differences lie in the **data they are trained on**, the **modalities** they support, and the story associated with the security, commercials, licencing and **ethics**.



# It's Generative AI quiz time!

Can you define the meaning of any of these terms?

GPT (Generative Pre-Trained Transformer)

Zero, One or Few Shot Prompt

Set Temperature to zero

Fine Tuning

Multi-Modal

RAG (Retrieval Augmented Generation)

Foundational LLMs

Gork

Plugins

Recency Bias

# Prompt Engineering

Engaging with Chat GPT like search will not always generate useful outputs

## To effectively use generative AI at work


take time to “guide” the AI by describing your

## Context + Input + Output

then refine the output through subsequent conversation.

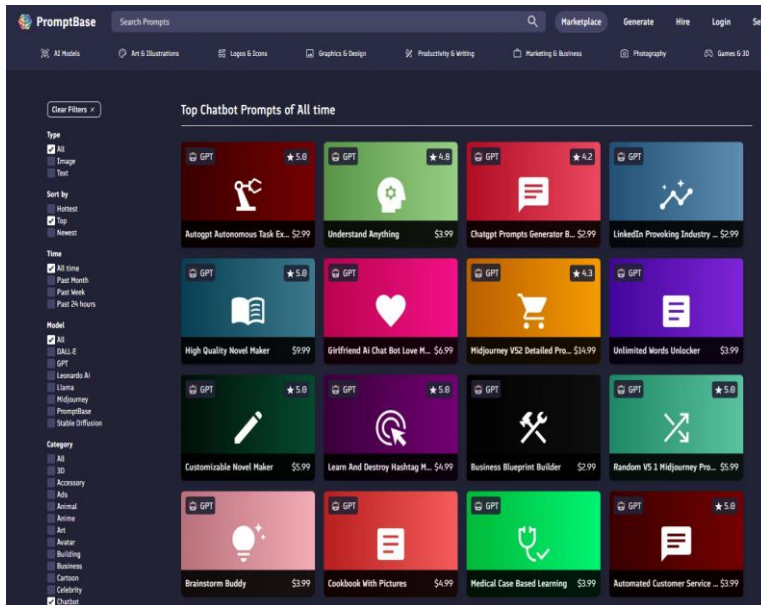
### Example of a well structured prompt

Good Morning! As an expert in employee engagement and connection, I need your help with a strategy to increase my employee attendance for events to create connection. Please provide a list of 10 innovative ways to bring meaningful conversation in a 30 minute virtual lunch. I'd like these ideas to be free of cost, and target conversations that cover a broad array of topics. Keep the approach friendly in the voice of Adam Grant. Before you respond, ask me any questions that will allow you to provide the best results. I appreciate your help!










# The Emerging GPT Market

Buy a Prompt



Open AI GPT Store

	<b>Cosmic Dream</b> Visionary painter of digital wonder	By ChatGPT
	<b>Tech Support Advisor</b> From setting up a printer to troubleshooting a device, I'm here to help you step-by-step.	By ChatGPT
	<b>Coloring Book Hero</b> Take any idea and turn it into whimsical coloring book pages	By ChatGPT
	<b>Laundry Buddy</b> Ask me anything about stains, settings, sorting and everything laundry.	By ChatGPT
	<b>Sous Chef</b> I'll give you recipes based on the foods you love and ingredients you have.	By ChatGPT
	<b>Sticker Whiz</b> I'll help turn your wildest dreams into die-cut stickers, shipped right to your door.	By ChatGPT
	<b>Math Mentor</b> I help parents help their kids with math. Need a 9pm refresher on geometry proofs? I'm here for you.	By ChatGPT

GPT as a service

**Leah**  
By ContractPodAi

Generative AI Legal Assistant

## Leah Copilot

Leah is more than hype—she makes it effortlessly simple for you to securely harness the full power of Generative AI. Leah is designed exclusively for legal and compliance use cases.

SEE LEAH IN ACTION

## **Q&A and Discussion**

How might this be useful to your work?

What risks might use of public Chat-GPT services pose?

**Time for a break**





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# **AI Market Landscape**

(relevant to UK third sector organisations and Adapta client base)

## **Session 1**

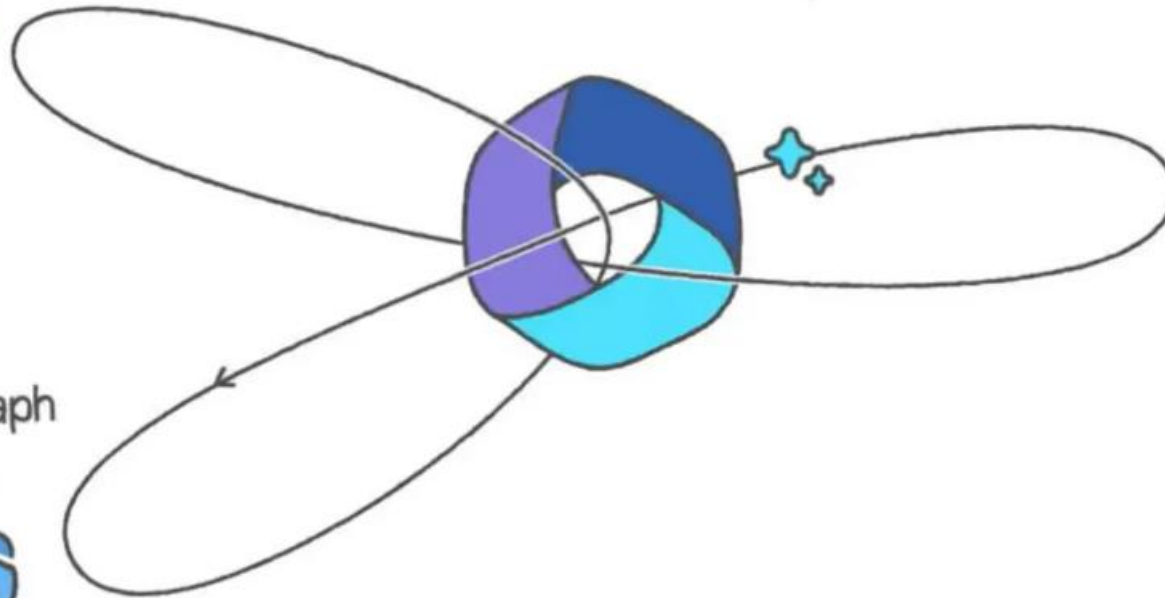
Microsoft Enterprise AI Products

# Microsoft 365 Copilot

Microsoft 365 Apps



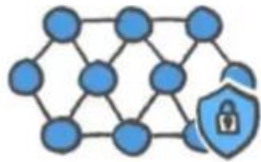
Microsoft 365 Copilot



Large Language Model



Microsoft Graph



-Your data-

emails, files, meetings, chats,  
calendars, and contacts



### Microsoft 365 Chat (preview)

Combine the power of AI with your work data and apps to help you unleash creativity, unlock productivity, and uplevel skills.

[Learn more about Microsoft 365 Chat >](#)



### Copilot in Teams

Have more effective meetings, catch up on chats, and bring everything together in Teams.

[Learn more about Copilot in Teams >](#)



### Copilot in Outlook

Start emails quickly, generate a summary, and catch up on long emails easily.

[Learn more about Copilot in Outlook >](#)



### Copilot in Word

Start a draft, add to an existing document, rewrite text, generate a summary, or chat with Copilot.

[Learn more about Copilot in Word >](#)



### Copilot in PowerPoint

Create a new presentation, organize and summarize presentations, and more.

[Learn more about Copilot in PowerPoint >](#)



### Copilot in Excel

Go deeper with data, identify insights, generate formulas, and more.

[Learn more about Copilot in Excel >](#)



### Copilot in OneNote

Summarize your notes, create a to-do list, design a plan, and chat with Copilot.

[Learn more about Copilot in OneNote >](#)



### Copilot in Loop

Plan, brainstorm, create, and collaborate easier to stay in sync.

[Learn more about Copilot in Loop >](#)

# The Microsoft Co-Pilots

## Co-Pilot for Bing (aka Bing Chat Enterprise)

is Microsoft's version of ChatGPT with the added benefit of commercial data protection available when using the Microsoft Edge browser, and it's safe to use at work because the data from employee prompts and responses don't go outside of the organization.

## Windows Copilot

provides AI assistance over your computer's operating system such as personalizing, configuring, or navigating your PC

## Microsoft 365 Copilot

Word, Excel, PowerPoint, Teams, and Outlook CoPilots to help build spreadsheets, summarise Teams meetings, create presentations or reports all *augmented with your data*.

## Microsoft Viva Sales/Dynamics 365 Sales Copilot

uses your Microsoft data to automate multiple common sales tasks such as contextualized email drafts, customer opportunity summaries, segmentation insights that draw on both Outlook and CRM data.

## GitHub and Power Platform Copilots

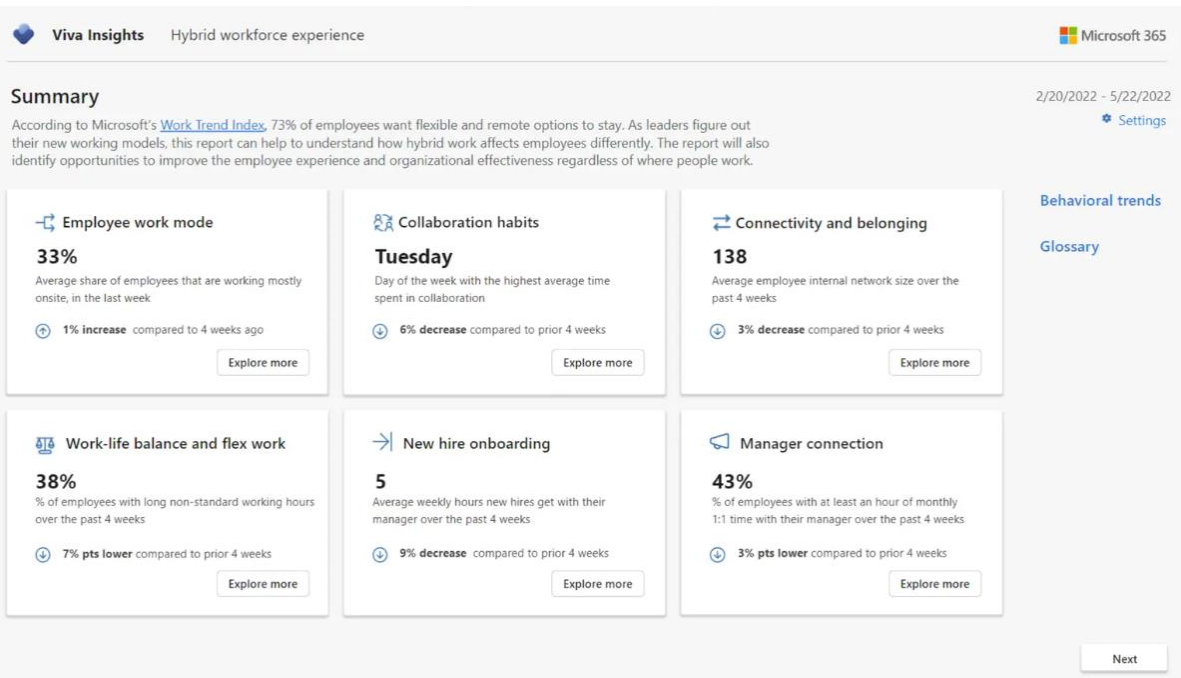
such as creating apps with NLP commands (Power Apps), editing your apps and enhancing them with Copilot controls or AI chatbots (Power Virtual Agents), or creating automation flows for business processes (Power Automate).

## Microsoft Security Copilot

helps you analyse your company's security posture, identify risks, determine mitigation steps, and respond more quickly to security incidents — all with the help of insights and data found across your various security applications.

# The Microsoft Viva Products

A suite of AI agents designed to help people work smarter.....



## What is Microsoft Viva Topics?

Topic is a phrase or term for a specific meaning to the organisation, and has resources related to it to help people understand what it is and find more information about it. Different types of topics will be important to your organisation.

Initially, the types of topics identified are:

- Project
- Event
- Organisation
- Location
- Product
- Creative work
- Field of study

Viva Topics looks to identify the following properties and display them on a Topic page:

- Alternate names and/or acronyms.
- A short description of the topic.
- People who might be knowledgeable about the topic.
- Files, pages, and sites related to the topic.

# Getting Ready for Microsoft AI

What data does Microsoft 365 Copilot access?



Emails, Meetings, Calendar, Contacts



Documents, other business data



Documents, other business data



Chat and Channel messages

What are the risks I need to consider?

1

Over-exposure of confidential data - Searches content you can VIEW

2

Redundant, outdated, and trivial (ROT) content - Inaccurate results

3

No policies for responsible AI use - Inappropriate use of Copilot

Build your governance and data security maturity



Workspace



Content



User

# **AI Market Landscape**

(relevant to UK third sector organisations and Adapta client base)

## **Session 2**

Salesforce AI Products





# Salesforce “Einstein”

## EINSTEIN SEARCH Natural Language Search

## EINSTEIN ACTIVITY CAPTURE

**Intelligent synchronisation** of your calendar and contacts (Gmail/Outlook) with Salesforce

- Emails with **sensitive information** are auto-identified and not shared, *regardless of other settings*

## EINSTEIN FOR NONPROFITS (NOT FOR PROFIT CLOUD)

Generates **predictive metrics** by “**modelling real world data in a Salesforce system**”.

- The Einstein Prediction Builder can generate percent probability scores for each supporter to be a first-time donor, recurring donor, or top donor.
  - Data Models are available if the client’s database doesn’t have enough data.
  - Metrics/scores can become part of the donor's profile record.

## EINSTEIN BOTS

Capability to train “bots” that can automate common tasks eg log ticket for routine enquiry, identify “dis-satisfied” supporters etc

# Einstein for Marketing

Give your marketers the tools to make every customer journey and interaction effective.



Understand customers better with predictive insights, create personalized messages and content, receive suggestions on when and how to engage with a customer, and more with Einstein for Marketing.

FEATURE	WHY IS IT SO GREAT?	WHAT DO I NEED?
EINSTEIN OVERVIEW	Provides an aggregated view of all activated Einstein for Marketing features' respective performance metrics	Any Einstein for Marketing feature
EINSTEIN ENGAGEMENT SCORING	Scores every customer's likelihood to engage with your emails, push notifications, or convert on the web	Web conversion predictions require use of the collect tag. Other technical restrictions may apply.
EINSTEIN ENGAGEMENT FREQUENCY	Prevents unsubscribes by knowing exactly how many emails to send to customers	Included with Einstein Engagement Scoring
EINSTEIN MESSAGING INSIGHTS	Easily monitors journey and batch email performance and optimizes areas that may be underperforming	Please refer to product documentation for this requirement
EINSTEIN COPY INSIGHTS	Identifies the language that drives subject-line engagement	Please refer to product documentation for this requirement
EINSTEIN SPLITS	Sends customers on the right journey path in Journey Builder based on their Einstein Engagement Score or persona	Included with Einstein Engagement Scoring; must have Journey Builder
EINSTEIN SEND-TIME OPTIMIZATION	Keeps every subscriber engaged by sending emails and push notifications at the optimal time of engagement	Please refer to product documentation for this requirement
EINSTEIN CONTENT SELECTION	Automated, intelligent, real-time message personalization at scale	Image-based content for ECS to select from. Please refer to product documentation for further information.
EINSTEIN CONTENT TAGGING	Automatically and accurately tags thousands of images within a content library	Please refer to product documentation for this requirement
EINSTEIN RECOMMENDATIONS	Delivers the next best product, content, or offer	Encouraged to have 25,000+ monthly website visitors, 1,000+ products in catalog, or 100+ pieces of content
EINSTEIN SOCIAL INSIGHTS	Gains deeper insights into your customers by analyzing social conversations	No minimum requirement
EINSTEIN VISION FOR SOCIAL STUDIO	Discovers rich insights from your customers' images on the social web	No minimum requirement
EINSTEIN SEGMENTATION (DMP)	Understands your entire customer base across clusters of personas and devices	DMP infrastructure successfully deployed, ≥1 million devices captured, ≥1 approved third-party data provider enabled
EINSTEIN JOURNEY INSIGHTS (DMP)	Uncovers the optimal sequence of events to optimize every journey	No minimum requirement
EINSTEIN LOOKALIKES (DMP)	Expands an audience by finding other users in the DMP universe similar to your best users	Please refer to product documentation for this requirement
EINSTEIN CDIM (DMP)	Expand an audience by including devices most likely associated with those from the original segment	Please refer to product documentation for this requirement
EINSTEIN MARKETING INSIGHTS (DATORAMA)	Completes the picture of total marketing performance management by making your most crucial insights rise to the top	Please refer to product documentation for this requirement
EINSTEIN BEHAVIOR SCORING (PARDOT)	Knows how interested a prospect is from their buying signals and engagement patterns	≥6 months of prospect engagement data and ≥20 prospects linked to opportunities
EINSTEIN CAMPAIGN INSIGHTS (PARDOT)	Maximizes campaign effectiveness in real time	Connected Campaigns enabled with ≥50 campaigns connected

# **AI Market Landscape**

(relevant to UK third sector organisations and Adapta client base)

## **Session 3**

Google, Meta and Other AI Products



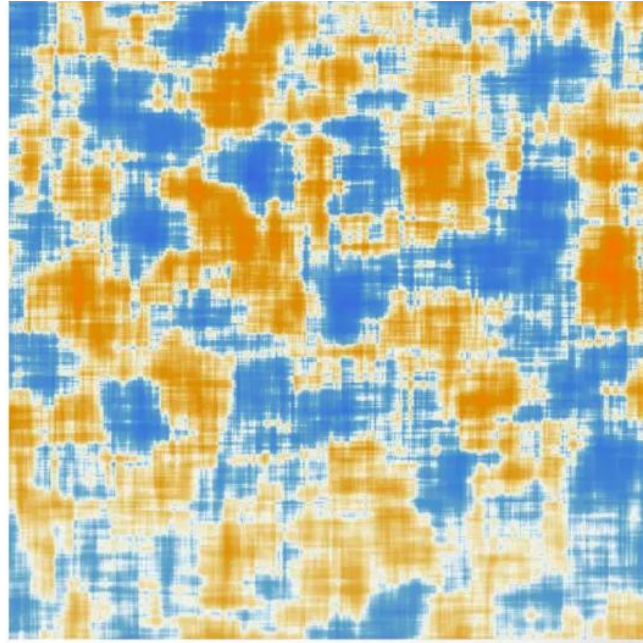
Own an alternative LLM known as LLAMA2 (branded as Meta AI) broadly similar to Chat GPT<sub>4</sub> but being open source this foundational model is being heavily developed by the open source community through AI development sites such as Hugging Face. Meta is employing AI in it's consumer products :

- **Virtual Avatars** in WhatsApp
- Auto generated stickers/emoticons (derived from what you are typing/saying)

Meta AI is strategically focused on the Metaverse and the bridge between the physical and virtual world resulting in :

- Recognising images and words through MEG images (brain scans)
- Summarising key information visually recognised whilst wearing Meta Smart Glasses
- Improved recognition of your body movements whilst wearing Quest 3 VR for your journeys in the metaverse
- Using Meta activity to help identify suicidal and depressed people and how technology can be used to approach and support.

Talking of brain scans what is this?





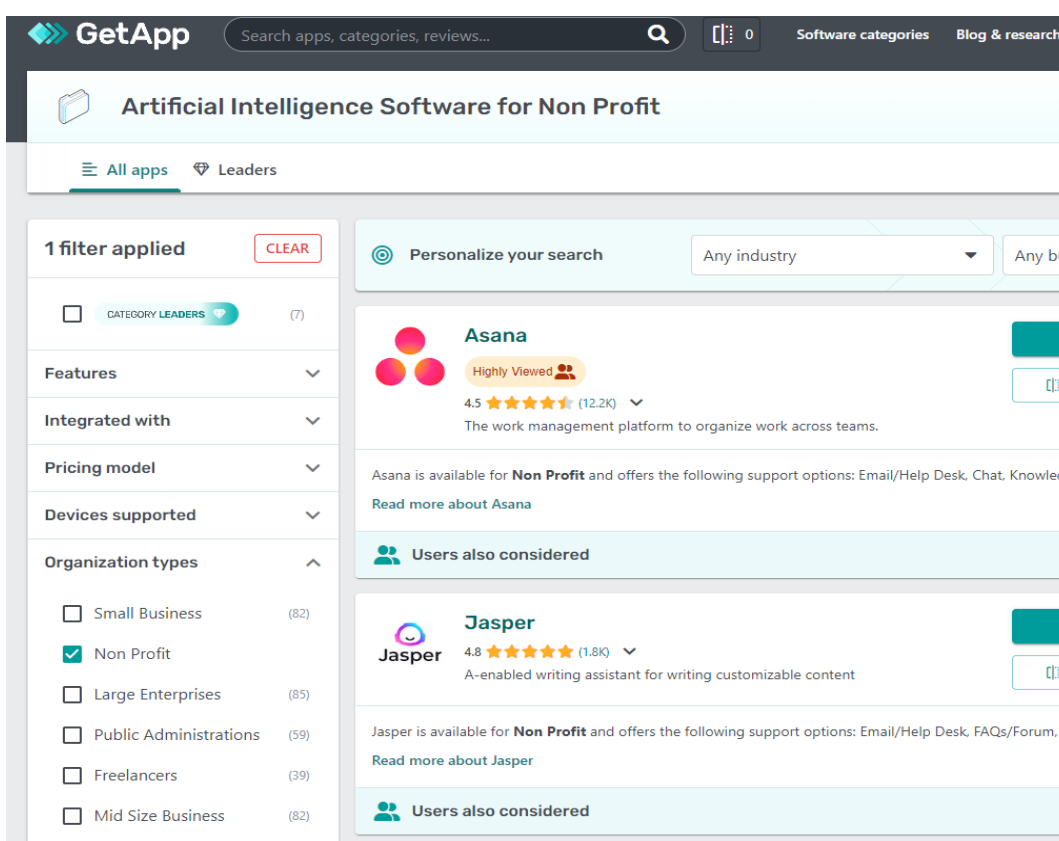
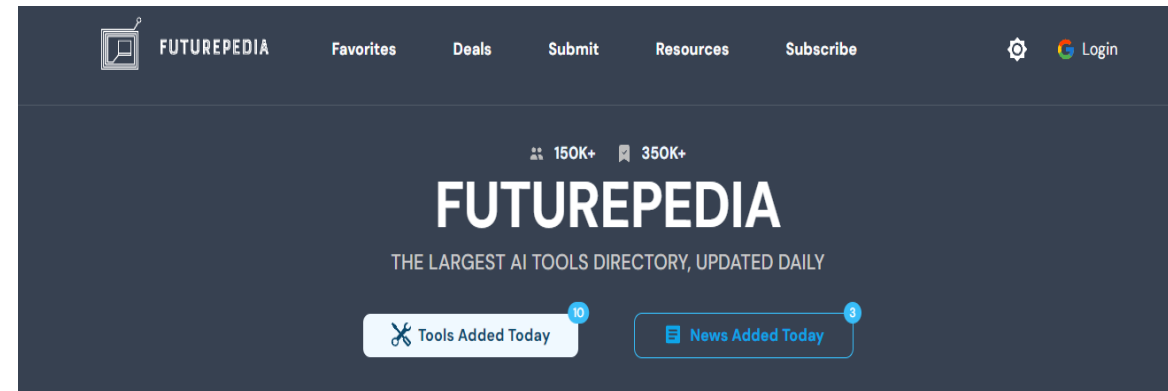
Own multiple LLMs including PaLM; a Chat GPT alternative branded as Bard and offer a similar suite of Google Workspace assistants and cloud based AI services similar to Microsoft. Google is employing Bard AI in it's consumer products :

- to "deep dive" into Google Maps, YouTube and Google Flights/Hotels
- into Google Search (currently described as SGE "Search Generative Experience")

Google AI is also developing AI in YouTube for :

- Creators eg auto generate/translate content, summarise comments
- Advertisers eg help marketing staff target adverts on YouTube through **content association**
- Viewers eg content summarisation, improved search into video content

# The emergent market for AI powered software..



**Artificial Intelligence**

**Venture Scanner**

Contact [info@venturescanner.com](mailto:info@venturescanner.com) to access the full landscape report and database with all 1464 companies

# Your AI Fundraiser

Create and execute an entire multi-channel fundraising campaign from a single brief..... 🤖

**Campaign Home**

Planned Giving 3    Update Campaign Brief

**Text Messages (2)**

- Text Messages 2**  
The time you spent at Central Piedmont shaped who you are today. Pay that gift forward by establishing an...
- Text Messages 1**  
You have the power to shape Central Piedmont's future. Make a lasting impact through a planned gift. Let's discuss how...

**Social Media Posts (3)**

- Facebook 3**  
You have the power to shape Central Piedmont's future through a planned gift. Whether it's a bequest, charitable...
- Facebook 2**  
We are so grateful for donors like [Name], whose bequest established the [Scholarship Name] and...
- Facebook 1**  
Legacy begins with you! Share your passion for Central Piedmont by including us in your estate plans. Let's have...

**Thank You (1)**

- Email 1**  
Dear James, I wanted to reach out right away with immense gratitude for your incredibly generous planned gift...

**E -Mails (2)**

**Add Content**

- Direct Mailings** (0/4)
- E -Mails** (0/4)
- Video Scripts** (0/4)
- Social Media Posts** (Select Platforms: (any/all))
  - Facebook
  - Twitter
  - LinkedIn
  - Instagram
- Text Messages** (0/14)
- Phone Call Scripts** (Select caller type:
  - Board Member
  - Volunteer
  - Staff
- Thank You** (Select Options: (any/all))
  - Email
  - Direct Mail

Summarize this donor's giving history and approach to philanthropy. Then provide talking points for a CEO for a future meeting with this donor.

**Summary:** This donor, Sheldon B Lubar, is a distinguished philanthropist with a large estimated capacity for giving. He has a total charitable gifts amounting to \$8,523,263 and a real estate total value of \$10,173,000. Sheldon B Lubar has shown a propensity for giving to organizations like yours and may have an interest in planned giving opportunities.

**Talking Points:** In terms of his giving history, Sheldon B Lubar is considered to be decelerating in his donations, indicating a decreasing trend in yearly giving. However, he is still a great major gift donor with the potential for additional capacity.

**Additional Points:** For the CEO's future meeting with Sheldon B Lubar, talking points could include acknowledging his distinguished philanthropic status and expressing gratitude for his past donations. The CEO could also discuss the organization's personalized approach to engaging major gift prospects like Sheldon B Lubar, highlighting exclusive events, on-site tours, and the opportunity for a board nomination. Additionally, the CEO can mention the organization's interest in exploring planned giving options and how Sheldon B Lubar's philanthropic history and capacity make him an ideal candidate for a planned giving campaign.



## Q&A and Discussion

How might these AI products and capabilities be useful to your work?  
What risks might the use of such products (that leverage your data or form part of your digital presence) pose?

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# **Developing your own AI**

Ethical AI Development with Cloud AI Services

# AI Use Cases – Handy Hints

- ✓ Do you do this thing all the time?
- ✓ Is there a lot of value in doing this thing better, quicker and cheaper?
- ✓ Do the skills needed to do this thing well include
  - ✓ Knowledge,
  - ✓ Analysis
  - ✓ Creativity
  - ✓ Compliance
- ✓ Are any of the following skills needed :
  - ❖ Empathy
  - ❖ Planning
- ✓ Do I have or can I get all the “data” necessary to support this use case?

# How do you even build an AI?

## Narrow/Predictive AI

Your machine knows nothing.  
Train your machine with “data”  
Until it can do one thing better than me.

### Step 1 : Use case

Your  
training  
“data”



Your  
Machine  
output

**Step 2 : Find a supplier to build it.**

# Example Cloud AI Services

## Cognitive Services

### Computer Vision:

for image recognition, content moderation, and object detection. For example, to identify endangered species through image analysis

### Translator Text:

to bridge language barriers.

### Text Analytics:

to extract information from social media posts, survey responses or E-Mails for sentiment analysis, key phrase extraction or language detection.

## Machine Learning

### Predictive Analytics:

that forecast outcomes, such as donor behaviour or resource demand.

### Anomaly Detection:

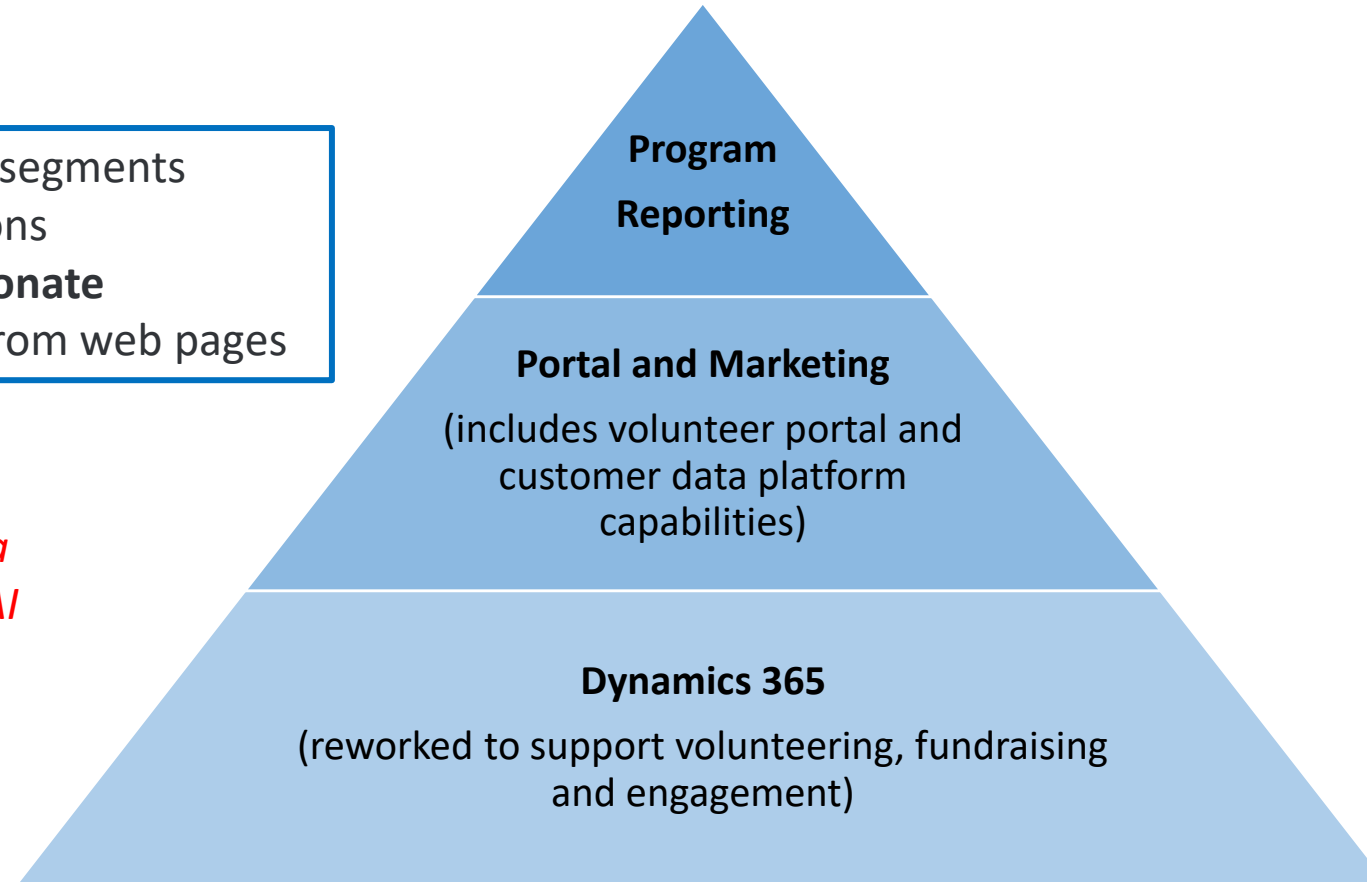
to identify unusual patterns or outliers in their data. For instance, anomalies in disease outbreaks or healthcare service utilization.

# Microsoft Not For Profit Cloud

## Emergent AI Capabilities?

- **Natural language queries** to build segments
- Highly **personalized** communications
- **which donors might be likely to donate**
- **Generate content** for everything from web pages

*Note : Salesforce NFP Cloud has a similar strategic proposition for AI*



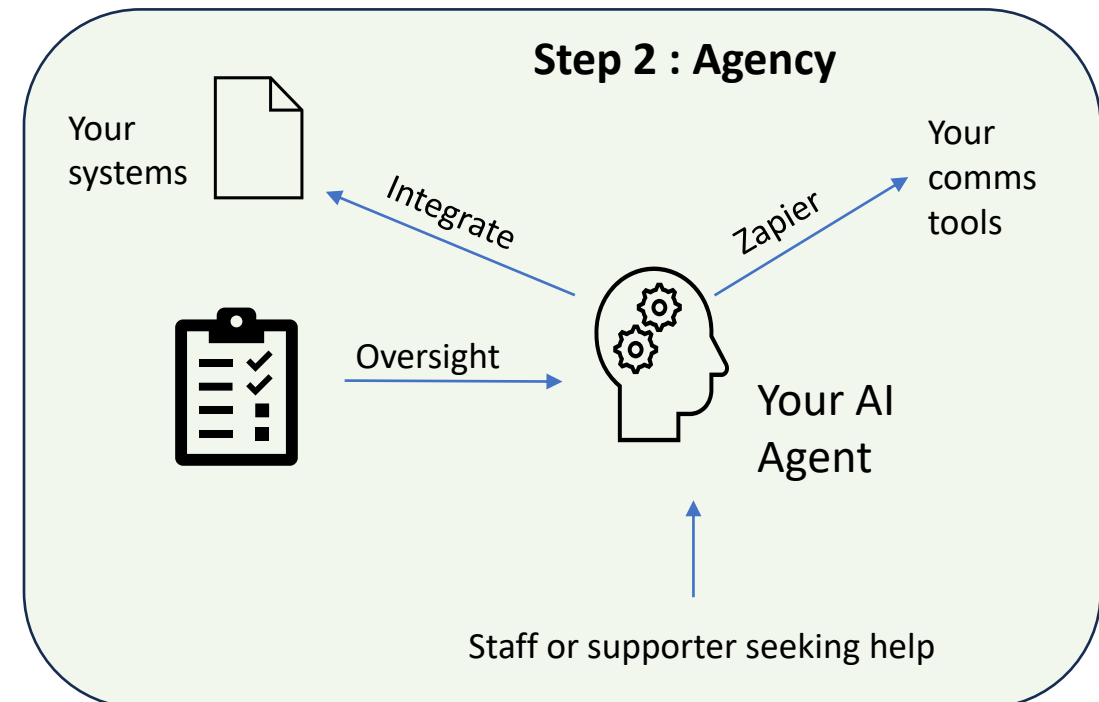
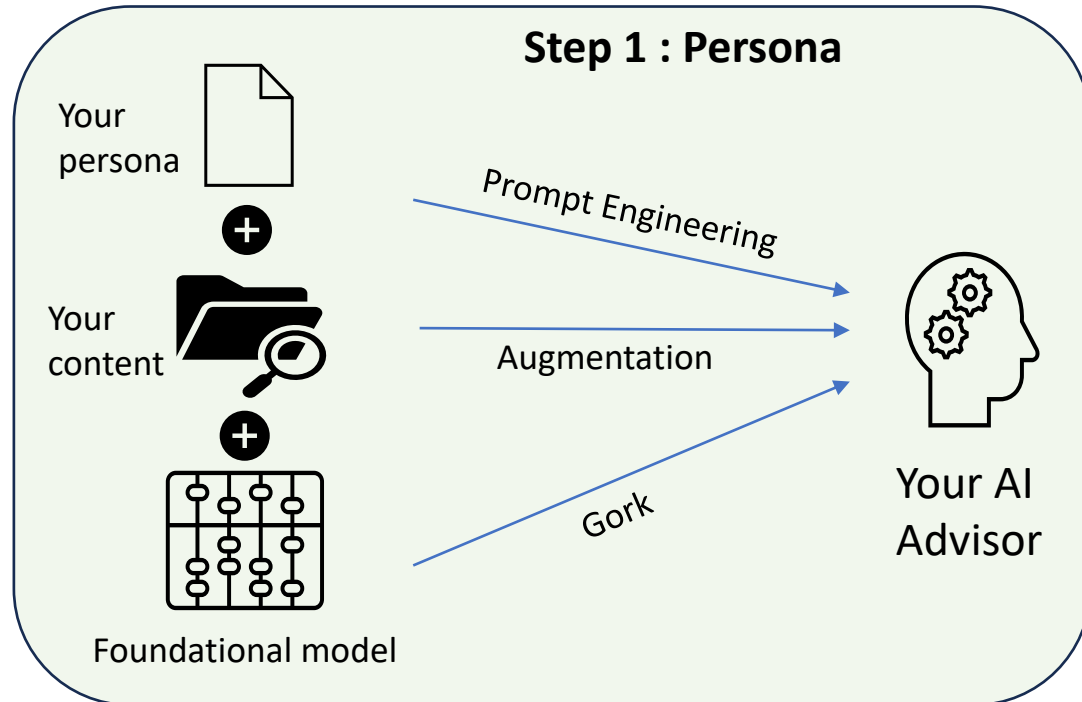
A “one stop shop” cloud solution that is especially suited to charities for advocacy, marketing, fundraising, volunteering, commerce, projects and services.

Less relevant to membership and grants orientated organisations

# How do you customise generative AI?

## Generative/Augmented AI

Like a new graduate, foundational AI can already talk knowledgably.  
Instruct it how to act as a “virtual employee” of your organisation.  
Over time give it agency to perform routine work



**Step 3 : Find a person or supplier to build it.**

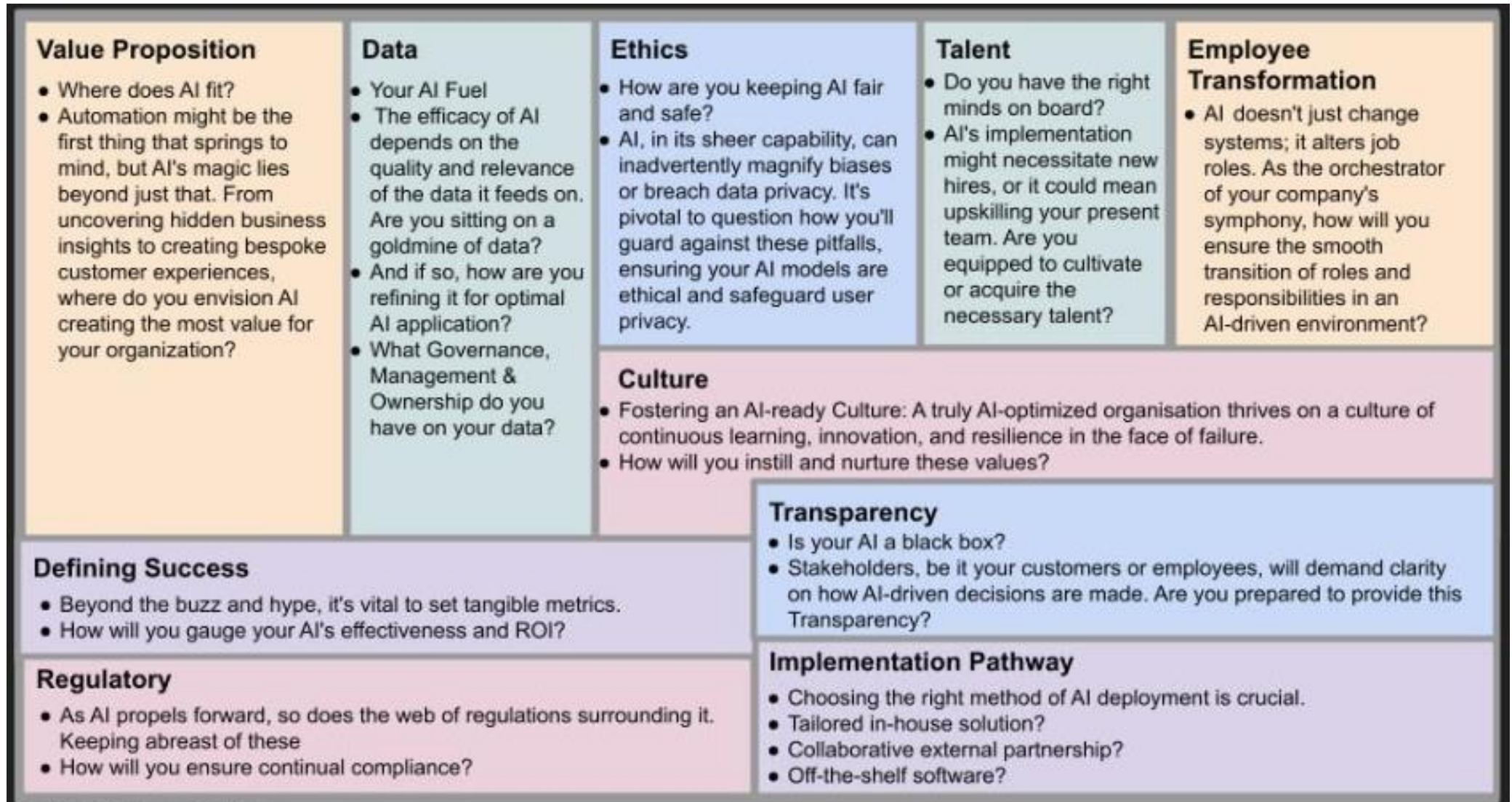




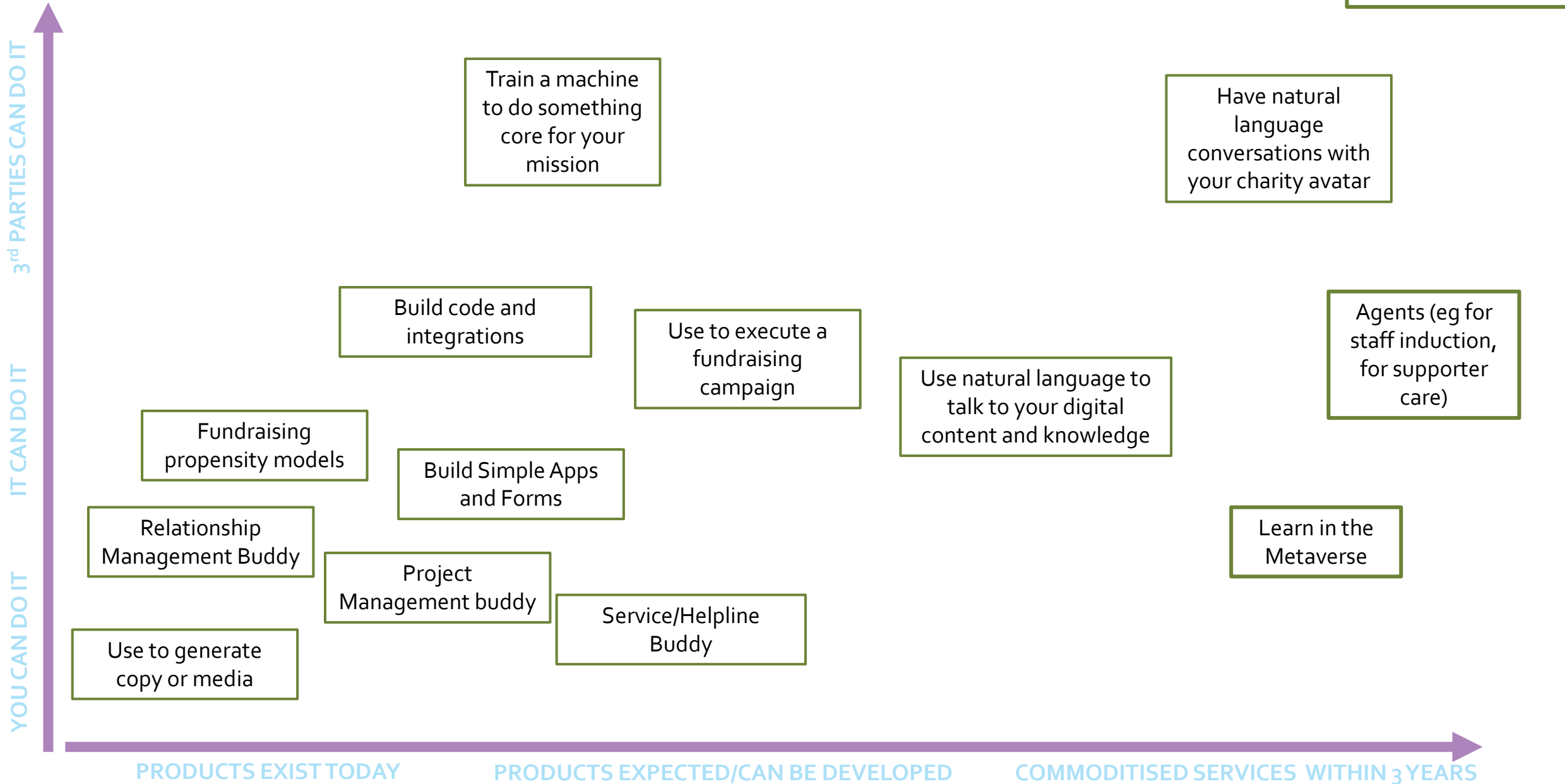
## Round table discussions –

1. How might AI be used in your organisation?
2. What are the potential benefits & risks?
3. What one thing might you do to get ready?

# Factors to consider for your “AI Strategy”



# Example use cases



# Event feedback



# Thanks & Goodbye!

## *Upcoming events...*

**DPA, Information Security & Cake, 7 Feb 2024**

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