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## Practical Uses of AI in Gift Planning (and For Everyone Else Who Juggles Too Much)

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Boston College

**Date:** April 30, 2026

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## Wait – Why Is She Talking About AI?

- Not in tech - gift planner for 20+ years
- Too much to do, not enough hours in the day
- Not selling a tool - just what works in real life
- If I can figure it out, so can you



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## Agenda

- AI Demystified
- Why I Use AI
- What to Use
- How to Talk to AI
- Day in the Life
- Pitfalls & Guardrails
- Tips & Tricks
- Q&A

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# Poll Time!

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## Why & When You Should Use AI

- Protect your time
- Start faster/jumpstart projects
- Offload the busywork
- Focus on what only you can do
  - What you want to do
  - Work & Personal

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## AI Demystified

- Chatbot:** You type, it responds (like a conversation)
- Traditional AI:** Analyzes and predicts (we already use this every day)
- Generative AI:** Creates new content (text, ideas, images)
- What powers it:** Think: very advanced autocomplete
- AI vs. Search:** Search finds/AI creates

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# Poll Time!

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## What I Use

- **ChatGPT (OpenAI)**
  - Most versatile, everyday assistant
  - Great for drafting, brainstorming & summaries
- **Claude (Anthropic)**
  - Best for writing, analysis & long documents
  - Strong for nuanced, sensitive communication
- **Google Gemini**
  - Best if you use Google Workspace
  - Works across Gmail, Docs, Sheets & real-time search
- **Microsoft Copilot**
  - Built into Microsoft 365
  - Ideal for Word, Excel, PowerPoint & Outlook

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## What to Use

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## How to Talk to AI

**Prompt - /Ghost**

/Ghost: Draft an email to a donor who has included BC in their estate plans and previously gave annually but has not given in the last two years. The goal is to re-engage them and secure a meeting in Naples the week of May 15. Make it thoughtful, strategic, and well-structured, with a clear but natural reason to meet.

➔

**Output**

Hi [Name],

I was thinking about you recently and realized it's been a while since we last connected—I'd love to catch up.

I'm going to be in Naples the week of May 15 and was hoping we might be able to find a time to get together while I'm in town. It would be great to hear how things are going on your end and share a few updates from BC.

If you're around that week and have some time, let me know what your schedule looks like.

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## How to Talk to AI

**Prompt - /Max**

/Max: Draft an email to a donor who has included BC in their estate plans and previously gave annually but has not given in the last two years. The goal is to re-engage them and secure a meeting in Naples the week of May 15. Make it thoughtful, strategic, and well-structured, with a clear but natural reason to meet.

➔

**Output**

Dear [Donor Name],

I hope this finds you well and enjoying time in Naples. I've been thinking of you and wanted to reach out to reconnect. I remain so grateful for your thoughtful commitment to Boston College through your estate plans. Support like yours reflects a deep belief in the University's future and makes a lasting difference.

I'll be in Naples the week of May 15th and would very much welcome the opportunity to see you while I'm there. It would be wonderful to catch up, hear what's new in your world, and share a few updates from campus.

If you're available for a coffee or a brief visit that week, I'd be happy to meet at a time and place that's most convenient for you. And if that timing isn't ideal, I'd be glad to connect at another time that works better for you.

Thank you again for all you've done for Boston College. I hope we'll have a chance to connect soon.

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## Yes, Really....

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## AI Pitfalls & Guardrails

- **Hallucinations** — it will confidently make things up; verify names, dates, facts
- **It's a draft, not the final** — AI helps you start and structure, but you own the work
- **Refine the output** — give direction; push back, correct, and try again
- **Watch tone and nuance** — especially in donor communications; keep it human
- **Protect privacy** — no donor data or PII; use approved, institution-supported tools
- **Follow your org's policies** — check IT/compliance guidelines
- **It LOVES em dashes** — edit for your own voice and style

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## Tips & Tricks

- Use Intensifiers
  - "extremely concise," "highly specific", "warm but brief"
- Ask for Options
  - "Give me three versions with different tones"
- Give it Your Draft to Improve
  - "This is an important (email/memo/letter...), assess the goal, identify shortcomings or gaps, and rewrite it"
- Use Settings
  - You can't tell it your preferences (tone, style, format, etc...)
  - Use Memory thoughtfully – it can learn your style over time
- Power Prompt
  - "Let's think step by step"
  - Forces the model to slow down, reduces errors

**You don't have to know how to use it – you can ask it to show you!**

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## Homework

**Four Things to do This Week:**

- Pick one AI tool — spend 20 minutes, no agenda
- Use it on something real you're working on
- Try one prompt from today — and save one that works
- Use it for something fun — images, trips, or proving a point



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## Handouts & Resources

- **AI Tools Guide:** curated list of platforms with links
- **Customized AI Prompts:** slash commands cheat sheet
- **How To-Contact Reports in Gemini:** step-by-step workflow

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## Questions?



Click the Q&A icon at the bottom of your screen.

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### Still Have a Question?

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**Phone:** 617-552-9030

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