



OUR TECH STACK Workshop Handout

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STEP 1 · IDENTIFY YOUR PAIN POINTS

Where are you losing the most time, energy, or sanity? Check all that apply, then write in specifics.

- ☐ 📢 Communication with team
- ☐ 📅 Scheduling meetings
- ☐ 📁 Finding documents/version chaos
- ☐ ✅ Project & task management
- ☐ 📊 Tracking data or reporting
- ☐ 📄 Contracts & signatures
- ☐ ✉️ Donor/Volunteer email outreach
- ☐ 🎨 Design & marketing materials
- ☐ 🤖 Not using AI at all (may not be a pain point but an intentional choice)

Biggest pain points right now:

STEP 2 · REVIEW YOUR CURRENT TECH - What Do You Have? How Is It Working?

List every tool your team currently uses - Identify what's working and what isn't.

[illegible]



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STEP 3 · MAP YOUR IDEAL TECH PROTOCOL - *What Should Live Where?*

Using the VOX framework, assign one tool to each role. No tool for it yet? Write down what you wish you had.

 VIRTUAL OFFICE <i>Project & task management</i> Our tool: _____ What lives here: _____ _____ _____	 FILE CABINET <i>Storage, sharing & archiving</i> Our tool: _____ What lives here: _____ _____ _____	 ROLODEX / CRM <i>Contacts, donors & outreach</i> Our tool: _____ What lives here: _____ _____ _____	 QUICK CHAT <i>Team communication hub</i> Our tool: _____ What lives here: _____ _____ _____
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STEP 4 · YOUR ACTION PLAN - Leave Here With a Next Step

 One tool from today I want to explore: Why it would help my org: _____ My first step this week: _____ Who else on my team should know about this? _____	 Accessibility & Budget Checklist <i>Before adopting any new tool, confirm:</i> ☐ Check TechSoup and Goodstack for nonprofit pricing FIRST ☐ Screen reader compatible? (JAWS, NVDA, VoiceOver) ☐ Works on Mac, PC, iPhone (Apple) and Android (Samsung) ☐ Tested with team for different preferences ☐ Free tier or trial available before committing ☐ Simple enough to onboard volunteers with minimal training ☐ Will we realistically use this in 6 months?
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