SAMPLE STRATEGIC DECISION BRIEF

Should a regional nonprofit adopt an AI intake assistant this year?

Fictional example. The organization, figures, and findings below are invented to show the structure and depth of a Crosdale Consulting decision brief. They are not drawn from any client. All numbers are illustrative.

THE DECISION

Leadership of a 120-person regional nonprofit must decide by the next budget cycle whether to purchase an AI assistant to handle client intake, and if so, when. The question behind the question: where is intake time actually lost, and will this tool recover it?

BOTTOM LINE

Fix the intake process first, then pilot the AI assistant against defined success criteria. The process fix pays back within the year at a fraction of the cost and is a prerequisite for the assistant to perform. Buying the assistant now would likely cost more than it returns over three years.

EVIDENCE COLLECTED

- **Volume and effort:** about 4,800 intakes a year, averaging 38 minutes of staff time each (3,040 hours, roughly $127,680 at an assumed $42 fully loaded hourly cost).
- **Data quality:** an estimated 22% of intake records are incomplete or inconsistent at entry, driven by duplicate forms across three systems.
- **Staff interviews:** most delay comes from re-keying and follow-up calls, not from the conversation itself.
- **Vendor review:** two candidate products meet security requirements; both depend on clean, structured intake data to perform as advertised.

ALTERNATIVES EVALUATED

Option	What it means	Upfront	Annual cost	Est. hours saved / yr
A. Buy now	License an AI intake assistant this quarter	$20,000	$36,000	1,216
B. Build custom	Develop in-house or with a contractor	Not pursued	–	–
C. Fix process first	Consolidate forms and systems, standardize intake, then reassess	$18,000	$0	760
D. Wait	Make no change this year	$0	$0	0

Option B was set aside: build cost and maintenance exceeded the benefit at this volume.

FINANCIAL IMPLICATIONS (THREE YEARS, ILLUSTRATIVE)

Option	Annual benefit	Three-year benefit	Three-year cost	Net
A. Buy now	$51,072	$153,216	$128,000	$25,216
C. Fix process first	$31,920	$95,760	$18,000	$77,760

Assumptions. Hours saved are valued at $42 per hour. Option A assumes a 40% reduction in intake time, *achieved only if* record quality is fixed first; Option C assumes a 25% reduction. Benefits begin immediately and hold flat. Licensing is $36,000 a year with a $20,000 setup. Savings are redeployed capacity, not headcount reduction. Not modeled: change in client satisfaction, error reduction, or avoided rework.

Sensitivity. Option A overtakes Option C only if its time reduction exceeds roughly 54% or if licensing falls by about half. Neither is supported by the evidence reviewed.

RECOMMENDATION

> **Proceed with Option C now. Reassess Option A at day 90 against three gates:** (1) incomplete records below 8%; (2) average intake time below 29 minutes; (3) a vendor pilot terms with a no-penalty exit.

KEY RISKS

- Process change slips because ownership is unclear. *Mitigation: name one accountable owner.*
- Staff resist consolidated forms. *Mitigation: involve intake leads in design.*
- Vendor pricing changes before pilot. *Mitigation: request a price hold.*
- Data governance gaps when AI is added. *Mitigation: adopt a short AI use policy first.*

WHAT WE DO NOT YET KNOW

- The true share of incomplete records, estimated from a sample of 300 files.
- Whether client-facing automation is acceptable to the populations served.
- Staff capacity to run both a process change and a pilot at once.

90-DAY ROADMAP

Days	Action	Owner
1–30	Map current intake end to end; consolidate to one form and one system of record	Operations lead
31–60	Roll out standardized intake; train staff; begin tracking completeness and time per intake	Intake leads
61–90	Measure against gates; issue vendor RFQ for a time-limited pilot; adopt AI use policy	COO and IT
Day 90	Go / no-go decision on a pilot of Option A	Executive team

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