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CLOUD+AI

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CLOUD | **2024**
AI Lookbook
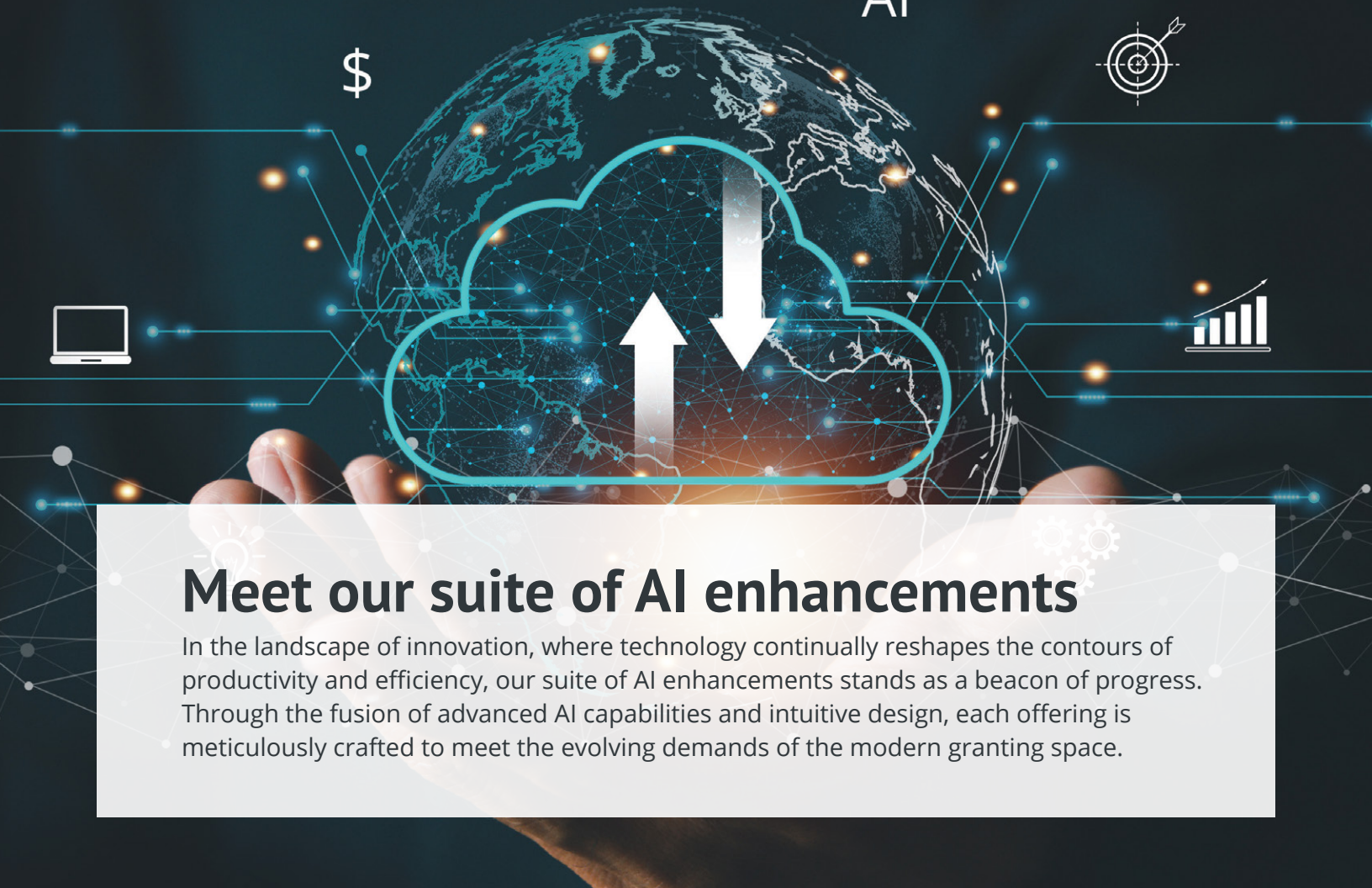
Table of contents

Introduction

Welcome to our look book for SmartSimple Cloud +AI. As artificial intelligence (AI) reshapes the modern world, our goal has always been to make advanced technology both accessible and beneficial for everyone. This look book will unveil the transformative potential of SmartSimple Cloud +AI, highlighting its diverse applications and the tangible benefits they bring.

In an era where staying informed and selecting the right solutions is crucial, this guide aims to provide you with insights into our dedicated offerings. Join us as we embark on a journey towards a smarter, more efficient future, and discover how SmartSimple Cloud +AI can play a pivotal role in your endeavors.

"SmartSimple continues to be an innovator in the game with their integration with AI. As soon as we heard SmartSimple had this capability, we wanted to implement the tool as soon as possible. It has been a time-saving tool for the grants team, saving approximately 50% of their time spent on generating writeups for each request brought forward to our board."

Kim Thao
Enterprise Innovation Director
Bader Philanthropies

Meet our suite of AI enhancements

In the landscape of innovation, where technology continually reshapes the contours of productivity and efficiency, our suite of AI enhancements stands as a beacon of progress. Through the fusion of advanced AI capabilities and intuitive design, each offering is meticulously crafted to meet the evolving demands of the modern granting space.

+AI Assistant

+AI Assistant transforms interaction with your SmartSimple system through a hands-free voice interface, enabling you to execute record-level actions with ease. Update statuses, modify field values, or create new fields and associations simply by using voice commands. This intuitive approach streamlines data management tasks, making updates more efficient and reducing the need for manual navigation and input. Ideal for dynamic environments seeking to enhance productivity through innovative AI solutions.

+AI Directive

Our +AI Directive enhances productivity by automating text analysis, summarization, translation, and data extraction. It uses Named-Entity Recognition for classifying text and offers an On-Demand mode for complex requests. Custom fields hold parsed content, while P3 Scripts trigger AI processes. Suitable for increasing efficiency, it requires an OpenAI license and Global Administrator access for setup. Learn more about its features and how to implement it in your workflow here.

+AI Insights

Explore the transformative capabilities of +AI Insights, SmartSimple's advanced solution designed to empower your data analysis and reporting within a Universal Tracking Application (UTA). +AI Insights allows you to query your dataset using natural language, making it simpler to access critical information without the need for complex list view filters or reports. From identifying applications

in 'Draft' status to summarizing award funding amounts, +AI Insights streamlines aggregation, summarization, and prediction tasks. It also enables the use of custom training sets, ensuring the AI model is finely tuned to your specific system knowledge. Perfect for organizations seeking to leverage AI for deeper insights and efficiency, +AI Insights requires an OpenAI license and Global Administrator access. Discover more on how +AI Insights can revolutionize your data handling here.

+AI Transcription

+AI Transcription enables English transcriptions for media files uploaded to SmartSimple, supporting 98 languages. It allows for further text processing, like summarization or translation, enhancing accessibility and efficiency. Ideal for users needing text over media content, it works with various file types and requires an OpenAI license. For setup and usage details, visit our Wiki.

+AI Workflow

+AI Workflow revolutionizes the efficiency of your workflow processes by leveraging AI to transform natural language instructions into actionable workflow tasks. This innovative feature eliminates the manual steps involved in task creation and linkage, streamlining your operations and enabling a more fluid, intuitive way to manage and automate workflows. Ideal for organizations looking to enhance productivity through smart, AI-assisted processes.

+AI Vision

+AI Vision allows users to upload images and have AI answer specific questions about the image contents, simplifying the process of gaining information without manually examining each image. It supports a range of image formats and has a file size limit of 20MB. This feature is useful for automating review processes involving image submissions, providing text summaries directly from uploaded images. It requires an OpenAI license and Global Administrator access for setup. For more details on configuring and using +AI Vision, you can visit our Wiki.

Working with +AI (Interactive Mode)

Working with +AI on SmartSimple enhances system processes by allowing conversational interactions with AI at the record level using natural language. This feature supports pre-made templates and prompt libraries for end-users to streamline the processing of record data for repetitive tasks, requiring an OpenAI license and Global Administrator access. For a comprehensive guide on configuring and utilizing this innovative tool, visit the SmartSimple Wiki on Working with +AI.

Use Cases Scenarios

The Power of +AI in Action

Check out our curated collection of use case examples. Each example is an exploration of how SmartSimple Cloud +AI can elevate operational efficiency, enhance decision-making processes, and unlock new possibilities. These use cases demonstrate the practical application of our AI enhancements across various sectors, illustrating their capability to adapt and thrive in the ever-changing landscape of the digital age.

Instant Application Summaries

AI-powered grant application summaries for faster decision-making

How are you streamlining the summarization process for board and other stakeholders?

Problem

The increasing volume and complexity of grant applications can make the creation of summaries for board members, board books, and other purposes labor-intensive and time-consuming.

Solution

Instant Application Summaries auto generates easy-to-understand summaries of each grant application, so grant managers can focus on making informed decisions.

Outcome

The solution cuts down the time and effort needed for creating summaries, enabling grant managers to better prepare materials for board members, board books, and other processes.

Quickly generate concise summaries of grant applications within your Grants Management System

Reviewing applications has always been a foundational part of grants management. As processes have grown more complex, many organizations have incorporated grant summaries into their strategy. These summaries serve as a valuable tool for various purposes such as initial reviews, community sharing, and even in board books for board members. However, creating individual summaries for each application can be a daunting task. It's not only time-consuming but also challenging to maintain consistency, particularly for programs that receive a large volume of applications.

This is the problem SmartSimple Cloud +AI's Instant Application Summaries solve. Utilizing Artificial Intelligence (AI), Instant Application Summaries introduce new options for organizations to approach this challenge, making the summary process more efficient and consistent.
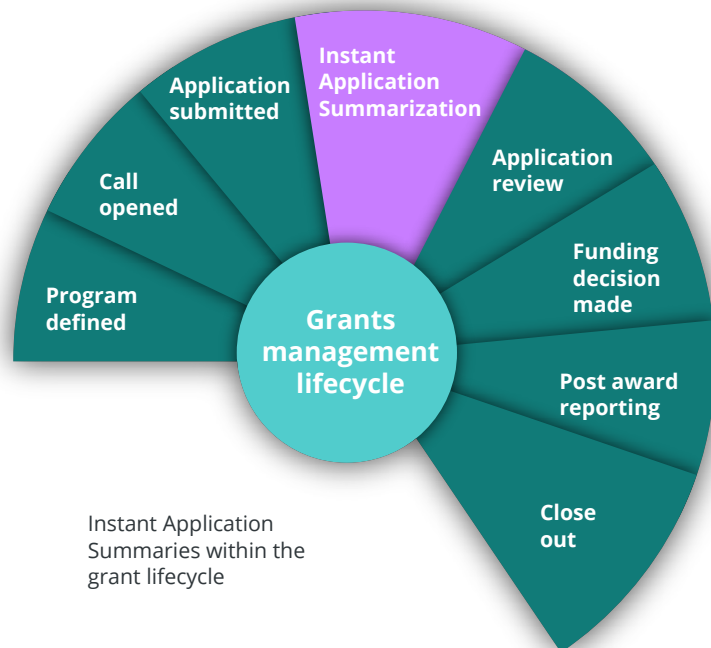
How it works

Instant Application Summaries scans each submitted grant application and automatically pulls out the most important details to create a straightforward summary. You won't need to read through every page or manually write summaries for board meetings or decision-making.

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Benefits to grants managers

1. **Time-Saver:** No more long hours spent summarizing applications; the feature does it for you.

2. **Scalable:** Whether you have 10 or 1,000 applications, the feature adapts to your needs.

3. **Informed Decisions:** With concise summaries, you can quickly grasp the essentials of each application, making it easier to allocate funds effectively.

Supports the application review process of the grants management lifecycle

SmartSimple Cloud +AI's Instant Application Summaries is a transformative tool that harnesses the capabilities of AI to empower grantmakers through their important application review processes. By improving efficiency, guaranteeing consistency, providing scalability, and enhancing decision-making, it can be an important part of a streamlined, objective, and effective application review process within a grants management lifecycle.

Get started today

To learn more about Instant Application Summaries, contact SmartSimple at **platformsolutions@smartsimple.com** or subscribe to SmartSimple Cloud +AI through the **SmartSimple Cloud Marketplace**.

Instant Application Summaries within the grant lifecycle

Grants management lifecycle

- Program defined
- Call opened
- Application submitted
- Instant Application Summarization
- Application review
- Funding decision made
- Post award reporting
- Close out

AI-Assisted Application Screening

Transform your grant review process with intelligent pre-screening

How do you ensure equity in funding amidst a surge of grant applications?

Problem

Managing a high volume of grant applications and ensuring equitable funding outcomes are significant challenges for grantmaking organizations.

Solution

SmartSimple's AI-Assisted Application Screening automates the pre-screening of grant applications based on program eligibility criteria, providing a grade and summary for each application.

Outcome

With pre-screening, grant program staff can more efficiently manage high application volume scenarios, while supporting fairness, and transparency, leading to impactful and equitable funding outcomes.

Automate pre-screening to optimize programs with high and moderate application volumes, ensuring quicker, more equitable funding

Grantmaking organizations play a crucial role in supporting community initiatives, but managing a large volume of applications and ensuring equitable funding can be challenging. To help grantmaking organizations overcome these obstacles, we are happy to introduce AI-Assisted Application Screening, powered by our SmartSimple Cloud +AI.

You control the eligibility criteria

AI-Assisted Application Screening leverages the power of artificial intelligence (AI) to transform the grant application review process by enabling grantmakers to automatically pre-screen applications by comparing an application's contents with a program's eligibility criteria and requirements. This process identifies ineligible applications without the use of specific validation criteria.

Ensure transparency and consistency

With AI-Assisted Application Screening, SmartSimple Cloud +AI automatically generates a grade and a summary explaining the reason behind the grade. The process can then automatically update the
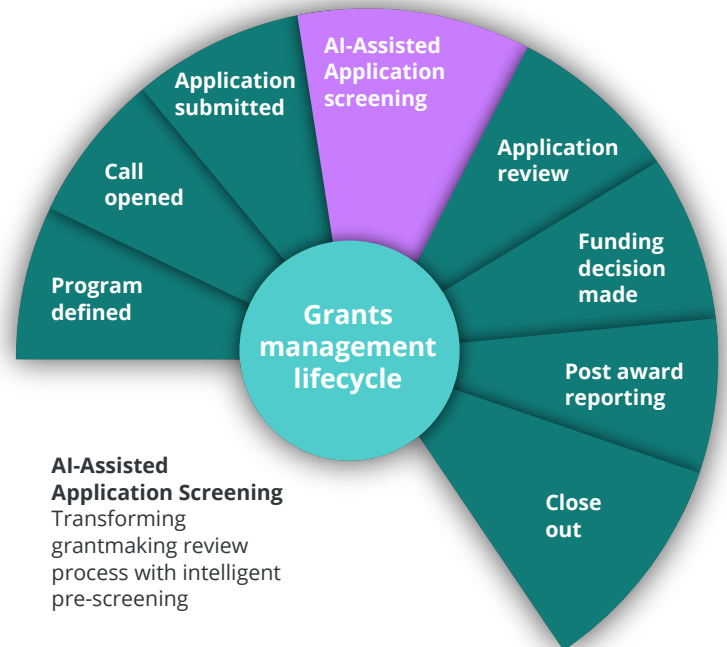
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status of the application accordingly, categorizing submitted applications into buckets like "AI Pre-Screen Pass" or "AI Pre-Screen Fail."

Grant program staff can access a list displaying submitted applications, allowing them to quickly process incoming requests and prioritize which applications to address first. Sorting the list of recently submitted applications by descending grade helps grant program staff prioritize applications with the highest likelihood of approval, streamlining the review process. Additionally, the AI-generated grade can also be displayed with the sorted list for grant staff.

AI-Assisted Application Screening
Transforming grantmaking review process with intelligent pre-screening

Lifecycle diagram — "Grants management lifecycle" with stages: Program defined, Call opened, Application submitted, AI-Assisted Application screening, Application review, Funding decision made, Post award reporting, Close out.

Grantmaking with smart Pre-Screening unlocks:

1. **Enhanced efficiency:** Automating the pre-screening process saves time and resources, allowing grant program staff to focus on evaluating eligible applications.

2. **Improved consistency & equity:** By standardizing the pre-screening process, SmartSimple Cloud +AI ensures a consistent evaluation of applications based on their contents and program eligibility, promoting equitable access to funding opportunities.

3. **Data-driven decision-making:** AI-generated grades and summaries enable grant program staff to effectively triage applications and make data-driven decisions, leading to better funding outcomes and a more significant community impact.

4. **Customizable workflows:** Grant administrator staff can tailor the AI-Assisted Application Screening process and prompts to their specific needs and preferences, ensuring seamless integration with existing workflows.

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Applicants can expect:

1. **Fair evaluation:** By standardizing the pre-screening process, SmartSimple Cloud +AI ensures that applications are evaluated based on their contents and program eligibility criteria, rather than subjective factors. This creates an equitable evaluation process for all applicants.

2. **Faster feedback:** Automating the pre-screening process enables grant program staff to review applications more quickly, leading to faster feedback for applicants. This can help applicants understand their application status sooner and, if necessary, make improvements for future submissions or revise applications as necessary.

3. **Enhanced transparency:** AI-driven pre-screening promotes transparency in the grant application process by providing a consistent and data-driven evaluation method. This can help applicants build trust in the grantmaker's decision-making process and encourage them to continue seeking funding opportunities.

4. **Learning opportunities:** The AI-generated grade and summary, if shared with applicants, can provide valuable insights that applicants can use to learn from their application experience. This feedback can help them refine their grant writing skills and improve future applications, increasing their chances of securing funding in the future.

Good for grantmakers. Good for grantees

The AI-Assisted Application Screening offers a transformative solution for both grantmakers and grant applicants by streamlining the grant application submission and review processes, as well as promoting fairness and transparency. Automating the pre-screening process and providing valuable insights, helps grantmakers save time and make data-driven decisions while empowering applicants with faster feedback and equitable evaluation. Ultimately, this innovative approach enhances the overall grantmaking experience, leading to more successful funding outcomes and resulting in greater positive impacts on communities.

Get started today

To learn more about AI-Assisted Application Screening, contact SmartSimple at **platformsolutions@smartsimple.com** or subscribe to SmartSimple Cloud +AI through the **SmartSimple Cloud Marketplace**.

Supported Application Process

Your 24/7 virtual grant writing assistant

How do you account for disparities within your targeted applicant pool?

Problem
Many programs target communities that have limited financial resources, or have varying Levels of writing and communications skills.

Solution
A Supported Application Process provides real-time, program-specific guidance to applicants navigating the application process.

Outcome
SmartSimple Cloud +Al's Supported Application Process helps increase equability and inclusion, streamline review processes, and maximize program impact.

Enhancing the grant application experience for grantees and grantmakers alike with SmartSimple Cloud +AI

Grantmakers play a critical role in funding projects and initiatives that significantly impact their communities. However, creating equitable granting programs can be difficult given the possible disparities between potential grant applicants. Applicants without dedicated grant writers, those with limited resources, or those with varying writing and communications skills, may find it difficult to construct strong proposals. In some cases, an otherwise suitable applicant may be eliminated due to their inability to properly construct an application.

To help grantmakers facing these issues, SmartSimple is introducing the Supported Application Process, powered by SmartSimple Cloud +AI. This AI-supported process will enhance the grantee and grantmaker experience throughout the application and review stage of the granting lifecycle.
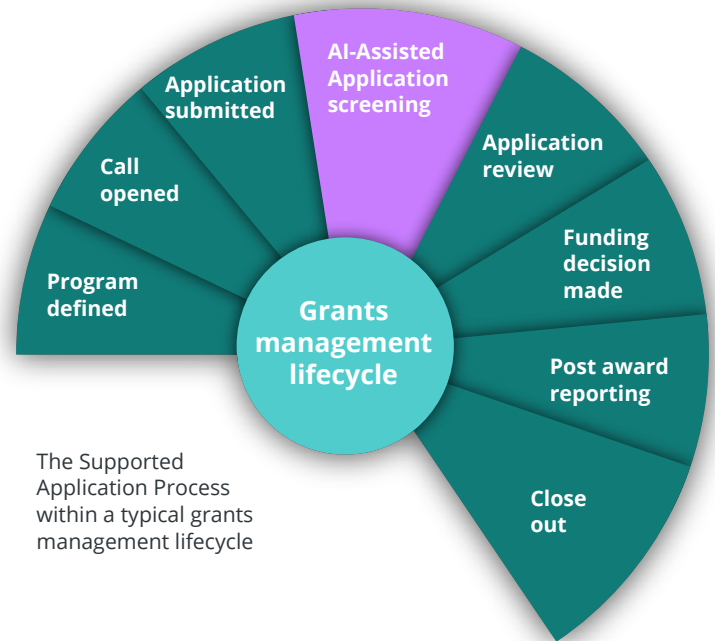
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Real-time, program-specific guidance

Supported by advanced AI functionality, grant applicants can receive guidance and support during the critical stages of the application process. This includes:

- assistance on how to structure a compelling proposal

- help in developing better narratives that outline the potential impact of their project

- assistance in developing a clear plan for project implementation and evaluation

The assistance provided is specific to the program they are applying for. With this support, more grant applicants will be capable of submitting higher-quality proposals, increasing the likelihood of a positive funding decision.

The Supported Application Process within a typical grants management lifecycle

Maximize equability and inclusion

For grantmakers, the Supported Application Process improves equitability among applicants and creates a more diverse and inclusive applicant pool. Additionally, grantmakers can expect a more streamlined application review process, have the opportunity to develop stronger partnerships with grantees, and enhance their ability to measure the impact of funded projects. The ultimate result is a more efficient grantmaking process, increasing the likelihood of funding projects that can have a significant impact on the community.

Benefits both applicants and grantmakers

The Supported Application Process, powered by SmartSimple Cloud +AI, provides significant benefits to both grantees and grantmakers. By offering AI-supported guidance to grant applicants, grantmakers can ensure more equitable access to their grant programs. This can be achieved by eliminating potential barriers to access and leveling the playing field for all applicants. In addition to promoting equitability and inclusivity, it also streamlines the application review process for grantmakers. Ultimately, this innovative approach to the application process has the potential to impact grantmaker program success outcomes and support them in meeting their greater mission.

Get started today

To learn more about Supported Application Process, contact SmartSimple at **platformsolutions@smartsimple.com** or subscribe to SmartSimple Cloud +AI through the **SmartSimple Cloud Marketplace**.

QuickTag

Streamline grantee searches and decision-making

Is navigating your grantee database hindering efficient decision-making?

Problem

Navigating grantee databases can be time-consuming and labor-intensive, hindering efficient search and strategic decision-making for grantmakers.

Solution

Quick Tag leverages AI to automatically tag and categorize organizations in grantee databases, transforming complex data into searchable hashtags.

Outcome

With Quick Tag, grantmakers can quickly find and compare organizations, making the process more efficient and enabling more strategic decisions.

Navigate your grantee database with precision

For grantmakers, efficiently navigating through a database of grantees and applicants can often be challenging. Grant Management Systems (GMS) are instrumental in tracking grantee data but typically lack the additional step of intuitively summarizing and classifying organizations by type. This results in grantee databases that are increasingly difficult to navigate over time. This makes everything, from database navigation to identifying similar organizations, much more difficult. Recognizing this gap, we present a novel feature called QuickTag.

Automate tagging in grantee databases, making searches faster and decision-making more strategic
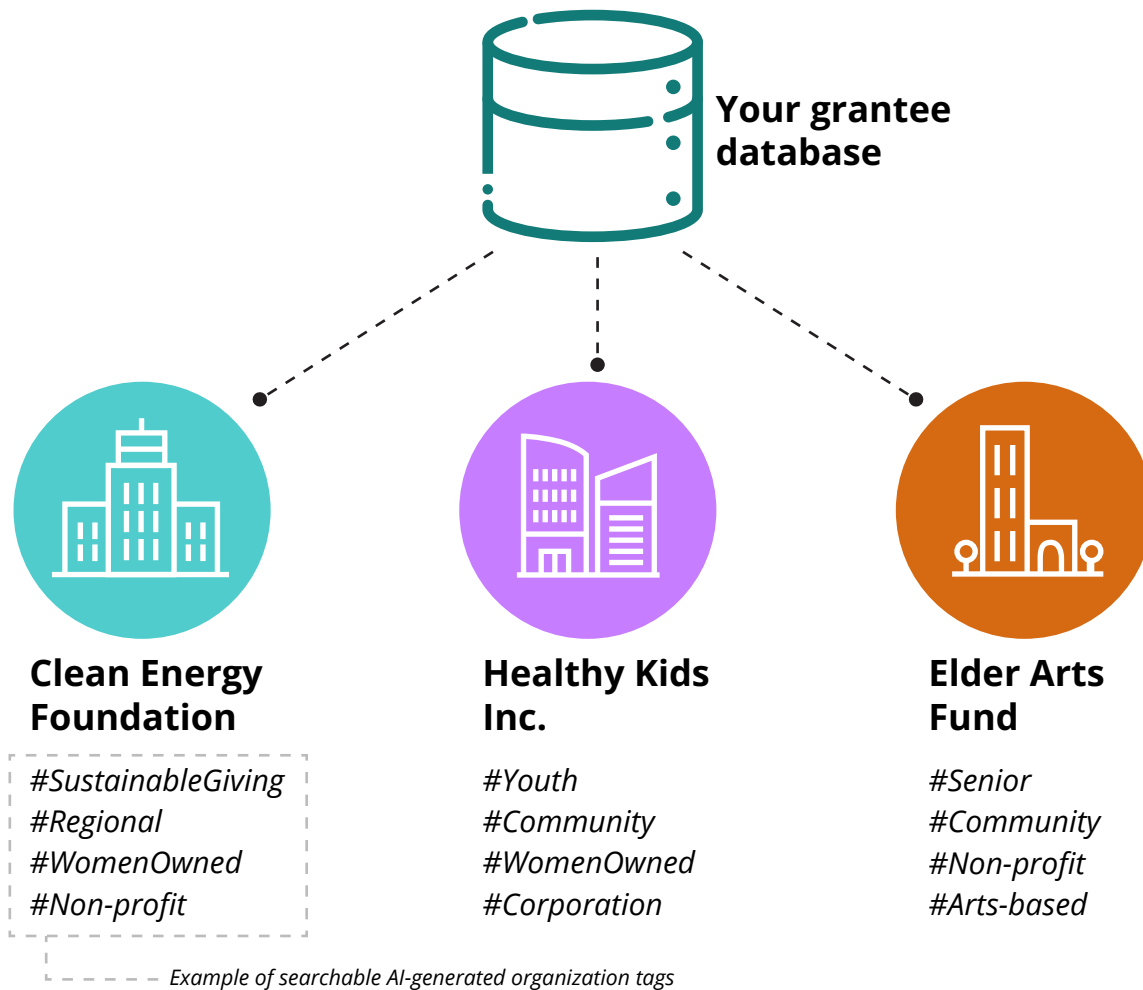
QuickTag is an AI-powered tool that takes SmartSimple Cloud to the next level. It goes beyond just storing organization data by automatically tagging each organization in your database. It analyzes your grantees' data and intelligently generates relevant searchable attributes, adding them to each organization's profile.

The beauty of this feature lies in its simplicity. In SmartSimple Cloud, these organization attributes are stored as user-friendly, and searchable, hashtags. This simple yet dynamic cataloging system drastically enhances the power of your GMS' customer relationship management (CRM) capabilities, enabling more intuitive navigation and search within your database.

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QuickTag and your grantee database

QuickTag analyzes each organization in a grantee database, intelligently attributing relevant hashtags. This enhances the CRM capabilities of the GMS, facilitating streamlined searches and efficient organization comparison, ultimately empowering grantmakers to make more informed and strategic decisions.

Your grantee database

Clean Energy Foundation

#SustainableGiving
#Regional
#WomenOwned
#Non-profit

Example of searchable AI-generated organization tags

Healthy Kids Inc.

#Youth
#Community
#WomenOwned
#Corporation

Elder Arts Fund

#Senior
#Community
#Non-profit
#Arts-based

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Let's explore the challenges grantmakers face without QuickTag:

1. **Navigational difficulty:** The current GMS often lacks efficient tagging, making navigation through the database a time-consuming endeavor.

2. **Manual classification:** Adding organization-specific classifications and hashtags one by one to each profile is a labor-intensive task.

3. **Identifying similar organizations:** Without an intuitive classification system, identifying similar organizations within the database becomes a tedious, manual process.

QuickTag benefits

By addressing these challenges, SmartSimple Cloud +AI's QuickTag delivers a range of benefits:

1. **Automated tagging:** This feature uses AI to automatically attribute tags to each organization in your database, significantly improving your GMS' CRM capabilities.

2. **Searchable tags:** The tool generates relevant, searchable tags for each organization's profile, enhancing your ability to intuitively search for specific organizations.

3. **Efficient organization comparison:** With automatic tagging, finding similar organizations within your database becomes significantly easier.

QuickTag illustrated

Consider the following example to illustrate these advantages. Suppose you are looking for organizations focusing on 'marine conservation'. Instead of manually trawling through each organization's profile, SmartSimple Cloud +AI's QuickTag automatically tags these organizations under the #MarineConservation hashtag. A simple search for this hashtag instantly displays all relevant organizations, saving you considerable time and effort.

QuickTag is a significant stride in the advancement of grant data management. This feature, by providing an efficient, intuitive classification system, empowers you to optimize your database management and make more strategic, informed decisions. It signifies SmartSimple's ongoing commitment to streamline your grantmaking operations, making them more impactful and user friendly.

Get started today

To learn more about QuickTag, contact SmartSimple at **platformsolutions@smartsimple.com** or subscribe to SmartSimple Cloud +AI through the **SmartSimple Cloud Marketplace**.

Glossary

Navigating the AI landscape can be complex. For clarity, we've compiled a glossary to simplify technical terms. Whether you're well-versed in AI or just starting out, use this section as a quick reference to enhance your understanding of our product.

Algorithm:
A set of rules or instructions given to an AI, ML, or DL model to help it learn and make decisions.

Artificial Intelligence (AI):
Technology that mimics human intelligence, like learning and problem-solving.

Data Mining:
The process of discovering patterns and knowledge from large amounts of data.

Deep Learning (DL):
A subset of ML that uses neural networks with many layers (deep neural networks) to analyze various factors of data.

Hyper-automation:
The process of increasing the automation of business processes (production chains, work flows, marketing processes, etc.) by introducing Artificial Intelligence (AI), Machine Learning (ML) and Robotic Process Automation (RPA).

Machine Learning (ML):
A subset of AI that enables systems to learn and improve from experience without being explicitly programmed.

Neural Network:
A series of algorithms that recognizes underlying relationships in a dataset through pattern recognition.

OpenAI:
A research lab focused on developing and promoting artificial intelligence (AI) that benefits humanity. Known for its contributions to the field, including the development of the GPT series of language models, OpenAI aims to ensure that AI is used for the benefit of all.

Reinforcement Learning:
ML model learns by receiving feedback (rewards or penalties) for its actions.

Robotic Process Automation (RPA):
A form of business process automation that is based on software robots or artificial intelligence agents. It is sometimes referred to as software robotics.

Supervised Learning:
ML model is trained using a dataset that already contains the output for each input.

Unsupervised Learning:
ML model is trained using a dataset without labeled responses.

Get started today

Throughout this look book, we've showcased the transformative potential of SmartSimple Cloud +AI, spotlighting the varied applications and real-world benefits. Our aim is to make advanced technology accessible and beneficial for all, and we believe our solutions are a testament to that commitment.

As the world continues to embrace AI, staying informed and choosing the right solutions becomes paramount. We invite you to join us on this journey towards a smarter, more efficient future.

For more information or to schedule a demo, please reach out to our experts. We're eager to assist and guide you every step of the way. Thank you for your interest, and here's to forging new frontiers together!

Talk to us

To learn more about SmartSimple Cloud +AI, contact SmartSimple at **platformsolutions@smartsimple.com** or subscribe to SmartSimple Cloud +AI through the **SmartSimple Cloud Marketplace**.

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