

Board reporting and documentation

Automatically compiles comprehensive board reports by aggregating data from multiple nonprofit systems and generates formatted documentation for board meetings. Saves hours of manual report preparation while ensuring consistent, accurate board communication.

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Get Your Blueprint

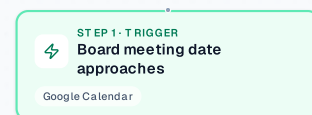


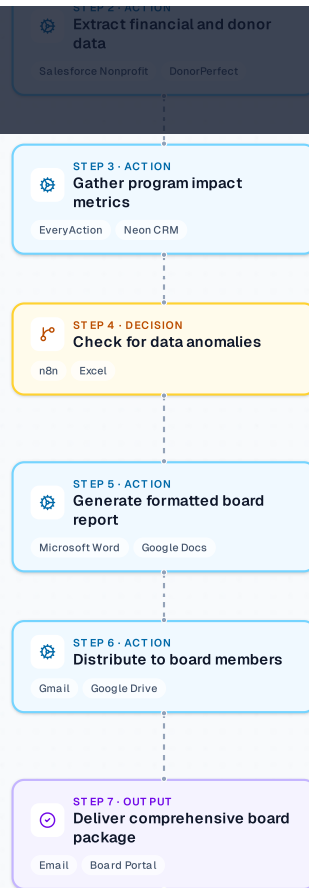
WORKFLOW TRIGGER

Board meeting scheduled in calendar (7 days before meeting date)

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Board meeting date approaches

Workflow triggers automatically 7 days before a scheduled board meeting date. Calendar integration detects upcoming board meetings and initiates the report generation process.

2

 ACTION

Extract financial and donor data

Pulls key metrics including total donations, donor acquisition, retention rates, and campaign performance from the nonprofit CRM. Aggregates financial data for the reporting period.

Salesforce Nonprofit

DonorPerfect

3

 ACTION

Gather program impact metrics

Collects volunteer hours, program participation numbers, beneficiary counts, and outcome measurements. Compiles grant compliance status and reporting requirements.

EveryAction

Neon CRM

4

 DECISION

Check for data anomalies

Analyzes collected data for significant variances, missing information, or unusual patterns. Routes to manual review if anomalies detected, otherwise proceeds to report generation.

n8n

Excel

5

 ACTION

Generate formatted board report

Creates standardized board report document with executive summary, financial dashboard, program updates, and key performance indicators. Applies nonprofit's board report template.

Microsoft Word

Google Docs

6

 ACTION

Distribute to board members

Emails completed board report to all board members with meeting agenda. Uploads report to secure board portal or shared drive for access.

Gmail

Google Drive

7

 OUT PUT

Deliver comprehensive board package

Board receives complete documentation package including financial reports, program metrics, and executive summary ready for review before the meeting.

Email

Board Portal



Outputs

- Formatted board report document
- Email distribution to board members

- Uploaded board package to secure portal

AI Business OS



Key Metrics

- Report generation time reduction
- Board member engagement rate
- Data accuracy percentage



Tools & Integrations

- Google Calendar
- Salesforce Nonprofit
- DonorPerfect
- EveryAction
- Neon CRM
- n8n
- Excel
- Microsoft Word
- Google Docs
- Gmail
- Google Drive
- Email
- Board Portal

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