

PPGC 2024
SAN DIEGO

Cresi AI

Ultimate Prompts

Charles Schultz, President
Elaine Yamasaki,
AI Marketing Consultant


Crescendo
Integrated Marketing for Planned Gifts

1



ChatGPT

1. Generative Pre-Trained Transformer
2. Large Language Model
3. ChatGPT 3.5 ~ December 2022
4. ChatGPT 4 ~ February 2023
5. ChatGPT 4.5 ~ 2024-2025
6. Neural Network ~ Human 100B, ChatGPT 200B
7. Next Word Probability



PPGC 2024
SAN DIEGO

2

2

How Generative AI Works

1. Large Language Model (LLM) – Trained on Multi-Trillion Words
2. Connections – About 300 Million Words
3. Algorithm – Find the Next Best Word
4. Aligned – Words and Values
5. Positive Text – Guardrails (Not perfect)
6. LLM – Ten Thousand Fundraising Documents
7. Similar Fundraising Text



Cresi Prompts

1. Action – What To Do
2. Format – Text, Bullets, Length, Paragraphs
3. Context – Donor Age, Background
4. Style – Tone, Emotion
5. Purpose – Nonprofit Charitable Purpose
6. Unique – Donor Reasons
7. Source – Marketing Text



Cresi Creative Writer



- Similar to Known Fundraising Documents
- Text Based Upon Best Practices



5

5

Cresi Postcard Prompts

1. Action, Purpose – Write to Motivate Donors
2. Format – Text, Length, Paragraphs
3. Style – Branding, Tone, Emotion
4. Source – Input GiftLegacy Text and Edit

Example College Prompt

Write a marketing text similar to the following with a goal to motivate IRA Rollover gifts from age 75 donors with college educations to give to a private college with teacher and liberal arts majors in 200 words: GiftLegacy Postcard Text



6

6

Cresi Insert Prompts

1. Action, Purpose – Write to Motivate Donors
2. Format – Text, Length, Paragraphs
3. Style – Branding, Tone, Emotion
4. Source – Input GiftLegacy Text and Edit

Example Medical Center Prompt

Write a marketing text similar to the following with a goal to motivate major DAF gifts from age 60 donors with high school educations to give to a medical center with a focus on cancer research in 100 words: GiftLegacy Insert Text



HAVE YOU
THOUGHT
ABOUT THE
FUTURE?

Do You Have A Plan?

Creating a plan to provide for your family and support the causes you care about is easy with our step-by-step planning guide. For more information regarding the benefits of creating a will or trust, or to request our DAF planning guide, please contact us today.

PPGC 2024
SAN DIEGO

7

7

Cresi Brochure Prompts

1. Action, Purpose – Write to Motivate Donors
2. Format – Text, Length, Paragraphs
3. Style – Branding, Tone, Emotion
4. Source – Input GiftLegacy Text and Edit

Example Social Service Prompt

Write a marketing text similar to the following with a goal to motivate IRA Rollover gifts from age 75 donors with high school educations to give to a food bank serving the needy in 300 words: GiftLegacy Brochure Text



PPGC 2024
SAN DIEGO

8

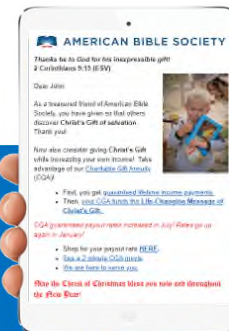
8

Cresi Newsletter Prompts

1. Action, Purpose – Write to Motivate Donors
2. Format – Text, Length, Paragraphs
3. Style – Branding, Tone, Emotion
4. Source – Input GiftLegacy Text and Edit

Example Religious Nonprofit Prompt

Write a marketing text similar to the following with a goal to motivate bequests from age 70 donors with high school educations to give to a religious foundation for world outreach purposes in 200 words: GiftLegacy Newsletter Text



9

Cresi Editing I

Ask (Food Bank Nonprofit)

- What motivates donors to give to a food bank?
- What do you know about our food bank?
- Who writes a good food bank fundraising letter?
- What is the best tone for a food bank?
- How does a food bank raise major gifts?
- How does a food bank raise bequest gifts?




10

Cresi Editing II

Rewrite With:


- Tone: Emotional, Witty, Enthusiastic, Friendly
- Different Age or Education for Donors
- Longer or Shorter Text, Number of Paragraphs
- Specific Topics in a Paragraph
- Ask Cresi to Improve Writing




11

Cresi Editing III

- Focus Person or Group
- Edit and Personalize for Nonprofit
- Know Your Goal for Content




12



Cresi Settings

- Named Setting
- Purpose
- Target Group
- Tone
- Method
- Donor Education
- Donor Age
- Donor Gift Reasons
- Mission Statement

Settings Custom Content Message Tips Donor Connections Master Gift Case



Content Settings

Organization Name: Southern College of Optometry

Organization Type: Education

My Setting: My Cresi (Default Setting) [+ Add Setting](#)

Setting Title: My Cresi ☒ Set as default

Purpose: Attract new donors

Target Audience: Board Members

Writing Tone: Emotional

Writing Method: Creative

Minimum Education: 6th Grade

Age Range: 41 or Over


Donor Support Reason: Eye Campaign for Glaucoma [+ Add Reason](#)

Donor Support Reason: Light Treatment for Retina [X](#)

Charitable Mission:

"At Southern College of Optometry, our mission is to advance the art and science of vision care through excellence in education, patient care, and research. We are dedicated to cultivating a dynamic learning environment that fosters critical thinking, clinical expertise, and ethical professionalism. By embracing innovation and compassion, we aim to shape the future of


13



Cresi Custom Content

- Cresi Settings
- Insert Text
- Cresi Edits and Displays
- Copy Text to Marketing Ad, Brochure or Postcard

Settings Custom Content Message Tips Donor Connections Master Gift Case



Customize Your Content

Organization Name: Southern College of Optometry

Organization Type: Education

My Setting: My Cresi (Default Setting) [v](#)

My Cresi Setting:


Rewrite my text with the same word count and framing the reader as a vital partner and hero for an educational organization named Southern College of Optometry. Their purpose is to Attract new donors, the target audience is Board Members, the writing tone is Emotional, the writing method is Creative, the education attainment of donors is 6th Grade, the target donor age of 41 or Over Include the following charitable purpose(s): Eye Campaign for Glaucoma, Light Treatment for Retina, Eye Research, Added Eye Research. Incorporate this mission statement in your revision: "At Southern College of Optometry, our mission is to advance the art and science of vision care through excellence in education, patient care, and research. We are dedicated to cultivating a dynamic learning environment that fosters critical thinking, clinical expertise, and ethical professionalism. By embracing innovation and compassion, we aim to shape the future of

[Read more](#)

Enter the text you would like Cresi to rewrite using the setting above:

[Back](#) [Submit](#)


14



Cresi Marketing Message

- Cresi Settings
- Mission Statement
- Themes That Connect at an Emotional Level with Your Donors

SettingsCustom ContentMessage TipsDonor ConnectionsMaster Gift Case


Customize Your Content

Organization Name: Southern College of Optometry
Organization Type: Education
My Setting: My Cresi (Default Setting)

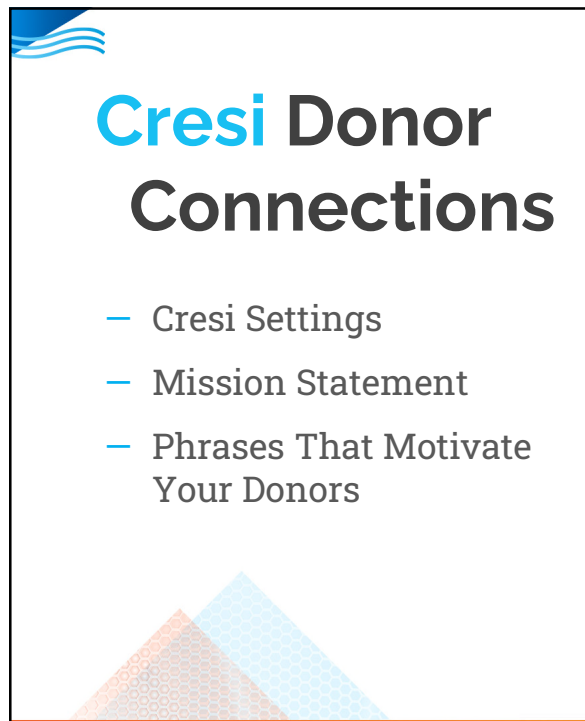
Southern College of Optometry Message Tips

What are the core marketing messages for an educational organization named Southern College of Optometry. Their purpose is to attract new donors, the target audience is board members, the writing tone is emotional, the writing method is creative, the education attainment of donors is 6th grade, the target donor age of 41 or over include the following charitable purposes: Eye Campaign for Glaucoma, Light Treatment for Retina, Eye Research, Added Eye Research. Incorporate this mission statement in your revision: "At Southern College of Optometry, our mission is to advance the art and science of vision care through excellence in education, patient care, and research. We are dedicated to cultivating a dynamic learning environment that fosters critical thinking, clinical expertise, and ethical professionalism. By embracing innovation and compassion, we aim to shape the future of optometry and make a profound impact on the well-being of our diverse communities. Our commitment to inclusivity and lifelong learning empowers our students and faculty to lead with vision, integrity, and a dedication to the highest standards of optometric care."

Version: 1

1. Imagine a Future Bright with Clear Vision - At Southern College of Optometry, we believe everyone deserves the gift of sight. With your support, we can turn this dream into reality.
2. Eye Campaign for Glaucoma - Your donation helps us fight glaucoma, a silent thief of sight. By contributing, you can help save someone's vision and give them a brighter future.
3. Light Treatment for Retina - Help us bring new light into the lives of those with retinal issues. Your generosity can fund cutting-edge treatments that restore and preserve the vision of those in need.
4. Eye Research - We are on the cusp of extraordinary breakthroughs in eye research. Your donation not only supports current projects but also fuels our innovative pursuits for tomorrow.
5. Added Eye Research - In addition to our primary projects, additional research initiatives are essential


15



Cresi Donor Connections

- Cresi Settings
- Mission Statement
- Phrases That Motivate Your Donors

SettingsCustom ContentMessage TipsDonor ConnectionsMaster Gift Case


Customize Your Content

Organization Name: Southern College of Optometry
Organization Type: Education
My Setting: My Cresi (Default Setting)

Southern College of Optometry Donor Motivation Message

What are the core donor motivation messages for an educational organization named Southern College of Optometry. Their purpose is to attract new donors, the target audience is board members, the writing tone is emotional, the writing method is creative, the education attainment of donors is 6th grade, the target donor age of 41 or over include the following charitable purposes: Eye Campaign for Glaucoma, Light Treatment for Retina, Eye Research, Added Eye Research. Incorporate this mission statement in your revision: "At Southern College of Optometry, our mission is to advance the art and science of vision care through excellence in education, patient care, and research. We are dedicated to cultivating a dynamic learning environment that fosters critical thinking, clinical expertise, and ethical professionalism. By embracing innovation and compassion, we aim to shape the future of optometry and make a profound impact on the well-being of our diverse communities. Our commitment to inclusivity and lifelong learning empowers our students and faculty to lead with vision, integrity, and a dedication to the highest standards of optometric care."

Version: 1

1. Help Save Sight: Join us in our Eye Campaign for Glaucoma. By supporting Southern College of Optometry, you can help prevent blindness and provide life-changing treatments.
2. Shine the Light: Your contribution to the Light Treatment for Retina fund will support cutting-edge treatments that can restore and improve vision.
3. Advance Research: Support our vital Eye Research projects. Your donation can help us make breakthroughs in diagnosing and treating various eye conditions.
4. Enhance Knowledge: Invest in Added Eye Research programs. Your gift can fuel the discoveries that will lead to better eye care for future generations.
5. Our Mission: "At Southern College of Optometry, our mission is to advance the art and science of vision care through excellence in education, patient care, and research. We are dedicated to

16

Cresi Master Gift Case

- Cresi Settings
- Mission Statement
- Nonprofit Type Template
- Custom Text For Your Master Gift Case

Settings
Custom Content
Message Tips
Donor Connections
Master Gift Case

Customize Your Content

Organization Name: Southern College of Optometry

Organization Type: Education

My Setting: My Cresi (Default Setting) ▼

Southern College of Optometry Master Gift Case

Rewrite my text with the same word count, with the purpose to attract new donors to give to an education organization called Southern College of Optometry, the target audience is board members, the writing tone is emotional, the writing method is creative, the education attainment of donors is 6th grade, the age range is 43 or over. Include the following charitable purpose(s): Eye Campaign for Glaucoma, Light Treatment for Retina. Incorporate this mission statement in your revision: "At Southern College of Optometry, our mission is to advance the art and science of vision care through excellence in education, patient care, and research. We are dedicated to cultivating a dynamic learning environment that fosters critical thinking, clinical expertise, and ethical professionalism. By embracing innovation and compassion, we aim to shape the future of optometry and make a profound impact on the well-being of our diverse communities. Our commitment to inclusivity and lifelong learning empowers our students and faculty to lead with vision, integrity, and a dedication to the highest standards of optometric care."

Organization Type: Education ▼

Version: 3 ▼

Learn, Lead and Inspire

Southern College of Optometry shapes dedicated vision care experts who bring light into the lives of others. Our students' passion helps fight glaucoma and enhance retinal health, impacting countless lives deeply. Your support empowers them to build a brighter world.

17

Cresi CresPrint

- Your Settings
- Charitable Purpose
- Customized Marketing Text

18

Privacy & Protection

1. Cresi – Remembers Prompts and Text
2. Nonprofit – Describe By Type of Charity
3. Personal Info – Do Not Input Personally Identifiable Information (PII)
4. Intellectual Property (IP) – CresPrint Permitted
But Other Text May Infringe
5. Fair Use – Major Editing by Nonprofit
6. Approvals – Check with Leaders/General Counsel
7. GiftLegacy User Content – Accepts Responsibility EULA



PPGC 2024
SAN DIEGO

19

19


ChatGPT Hallucinations

Hallucinations

- Two Sentences Contradict
- Text Unrelated to Prompt
- Random Text or Statement

Solutions

- Clear Elements in Prompts
- Donor Unique Gift Reasons
- Restate Prompt



PPGC 2024
SAN DIEGO

20

20

With \$Trillions coming...

...Will Cresi
help you
Capture
Your Share?



PPGC 2024
SAN DIEGO

21

21



PPGC 2024
SAN DIEGO

SPEAKER EVALUATION

COMPLETE THE SURVEY

Please fill out the speaker evaluation by using the QR code.

Powered by CresSurvey:

Crescendo
Integrated Marketing for Planned Gifts

22