



# BEFORE THE EDIT

A self-assessment for the infrastructure  
underneath your fundraising.



[info@viviastudios.com](mailto:info@viviastudios.com) | [viviastudios.com](http://viviastudios.com)

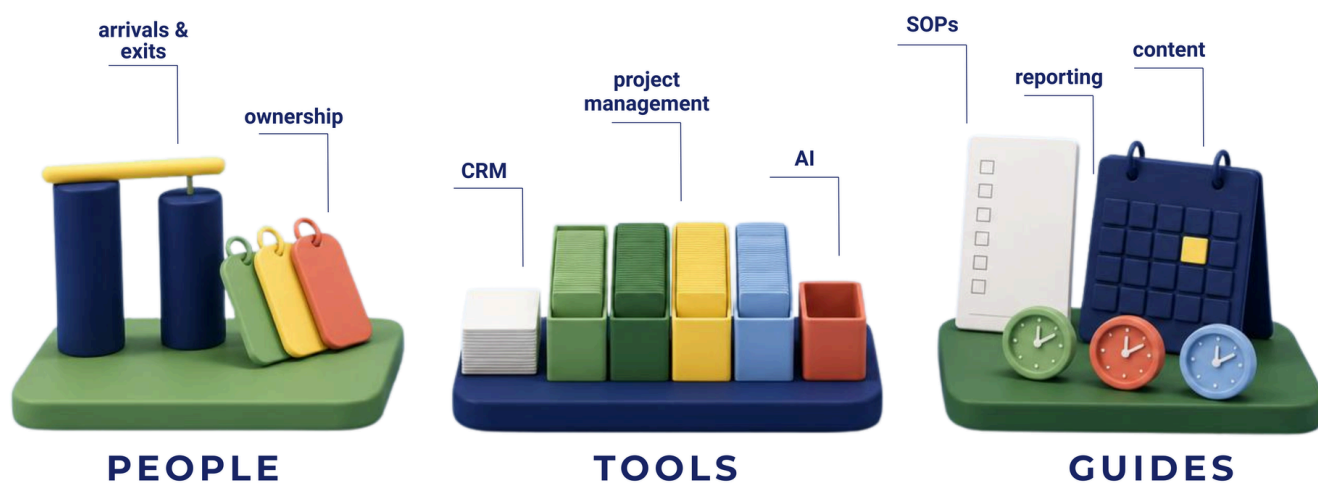
# BEFORE THE EDIT

## When fundraising falls short and nobody can explain why, look underneath it.

Not at the fundraiser and not at the strategy, but at the systems that are supposed to hold the work together. The database your team does not trust, the process that lives in one person's head and walks out the door when they leave, the report that takes three days to pull and still does not answer the question the board is asking. The donor who quietly stopped giving and nobody noticed until the campaign came up short. These are not failures of effort or ambition. They are failures of infrastructure, and they are fixable, but only after you can see them clearly.

This workbook maps the nine systems that sit underneath every fundraising operation, organized across three categories. People covers the systems that govern who does what and what happens during arrivals and exits. Tools covers the systems that move information and work through your organization, including your CRM, your project management system, and your AI workflows. Guides covers the systems that create consistency and make the work repeatable, including SOPs, reporting, and content planning.

Each section gives you five prompts to work through, not to grade yourself and not to feel behind, but to see honestly what is already there and what needs to come out before anything new goes in. That is the edit, and it starts here.



## ARRIVALS: ONBOARDING



1. Write down everything a new hire needs to know in their first 30 days.
2. Identify where each item on that list actually lives right now.
3. Find one thing every new hire struggles with and write the correct version.
4. Name one person responsible for making sure the new hire is ready.
5. Time how long it takes a new fundraiser to reliably access their prospects.

## EXITS: OFFBOARDING



1. List every task that lives in only one person's head.
2. For the top three, write the steps down this week.
3. Name a backup owner for each and share with the team.
4. Build a simple last-thirty-days checklist for the role you lose most often.
5. Decide what gets archived, what gets transferred, and what gets deleted.

## OWNERSHIP



1. Write out who owns each recurring task, only one name on each.
2. Put the name where the work happens, not in a doc.
3. For anything with two names, pick one and tell the other.
4. For anything with no name, decide if it still needs doing.
5. Add an owner to the template for any new recurring work.

### CRM (DATABASE)



1. Export your donor list and delete every record you cannot act on.
2. Pick the five fields you actually use and hide the rest.
3. Write the definition of your prospect stages so two people would sort the same way.
4. Add next step, stage, and due date to each record.
5. Set a standing thirty-minute weekly meeting to measure progress.

### PROJECT MANAGEMENT



1. Archive every task older than ninety days with no owner.
2. Give each active project one owner and one due date.
3. Write what done means for your three most common deliverables.
4. Cut the status meeting in half and move the rest to writing.
5. Agree on one rule for how a new request becomes a task.

### AI



1. List the three tasks that eat the most time and the least thought.
2. Try one AI tool on the smallest one this week.
3. Keep what saved time and drop what added steps.
4. Write down the prompt that worked in plain language.
5. Put those working prompts in one shared place the team can reach.

### SOPS



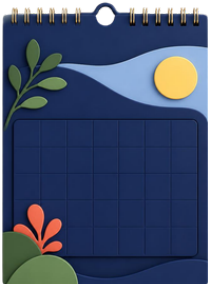
1. Write the one process that breaks most often, in plain steps.
2. Include only the decisions a reasonable person could not guess.
3. Store it where the work happens, not in a folder nobody opens.
4. Put a name and a review date on it.
5. Have someone who has never done the task run it from your draft.

### REPORTING



1. Choose the three numbers you would check before a board call.
2. Find where each lives today and write down the source.
3. Agree on a definition for all so the meanings stay consistent.
4. Build one view that shows all three.
5. Have someone else pull the same numbers and reconcile any gap.

### CONTENT PLANNING



1. List the content you produce on a predictable schedule.
2. Put those dates on one shared calendar with an owner attached.
3. Block the make time, not just the due date.
4. Build a small reusable template for your most frequent piece.
5. Decide in advance what gets cut first when a week goes sideways.