

This webinar will begin shortly

'AI for nonprofits – transforming financial
management in an era of uncertainty'

11 December 2025

13.00-13:45

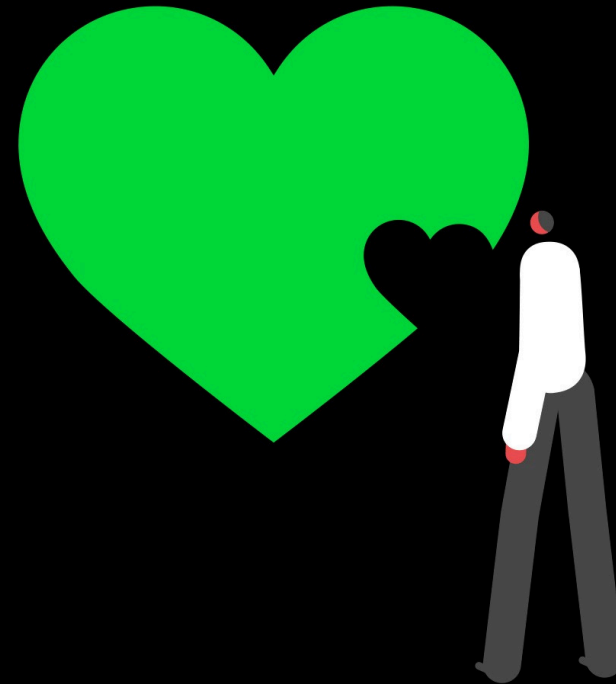
AI for nonprofits –transforming financial management in an era of uncertainty



Hobby Dean

NFP SeniorSolutionConsultant

Sage Intacct



Agenda

- **Why AI matters now for non-profit finance teams**
- **How AI improves accuracy, transparency, and decision-making**

Demonstration of AI and automation within Sage

- **Intacct**

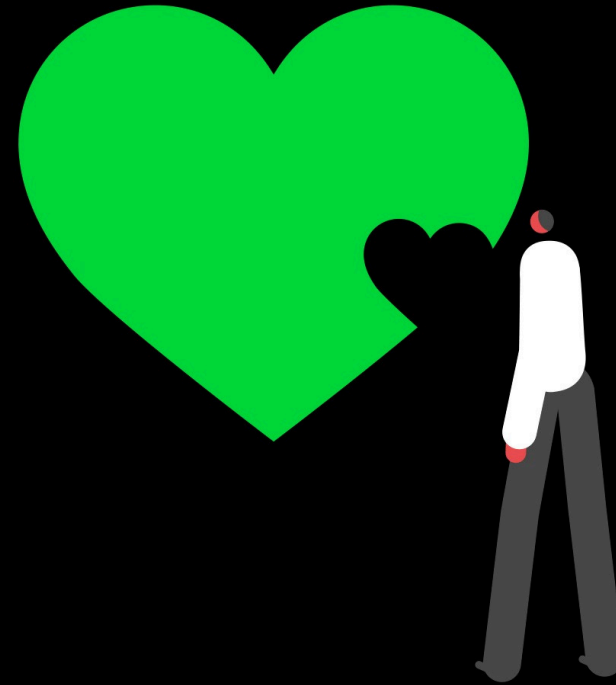
Why AI matters now for non-profit finance teams



Hobby Dean

NFP SeniorSolutionConsultant

Sage Intacct



2023 -Future using AI tools such as ChatGPT

- **First and foremost everyone's role is safe**
- **Key to data analysis is to use the right prompt with GPT tools**

Examples

- Understand potential donors/funders/sponsors
- More analysis on less data -extrapolate in multiple ways in less time
- Help evaluate fund raising ideas

...and so much more



AI is becoming more valuable in NFP

- **Lack of Funding**
- **Lack of Resources**
- **Increased Responsibility**
- **Some areas require you to do research**
- **Keeping a finger on the pulse**

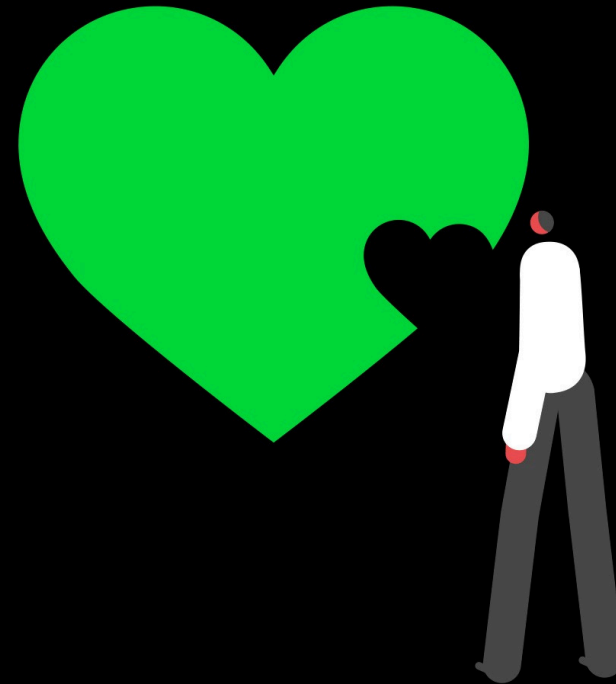
How AI improves accuracy, transparency, and decision-making



Hobby Dean

NFP SeniorSolutionConsultant

Sage Intacct



Examples of how AI can help Finance Teams

How can AI help
of uncertainty

AI can help nonprofits strengthen, streamline, and automate important ways—especially when budgets are tight and unpredictable. Here's a clear breakdown of the big

1. Automating Routine, Time-Consuming Tasks

Nonprofits often operate with lean teams. AI can help automate

- Invoice processing and approvals
- Expense categorization and reimbursement verification
- Data entry from receipts, forms, and bank transactions
- Donor record updates and reconciliation

Benefit: Staff can redirect time toward mission-critical

2. Enhancing Budgeting and Forecasting

AI can analyze historical financial data, program costs, and

- Predict revenue fluctuations (e.g., grants, donations)
- Estimate program expenses more accurately
- Identify cost overruns early
- Model different budget scenarios ("What happens if...")

Benefit: Leadership gets real-time insights to adapt

3. Improving Grant Management

AI tools can scan grant requirements, track deadlines, and analyze

- Ensure spending aligns with funder requirements
- Flag potential compliance risks
- Organize documents for audits
- Summarize complex financial reports

Benefit: Fewer compliance errors and faster reporting

4. Strengthening Donor Insights

AI can analyze donor behavior to:

- Identify which supporters are most likely to donate
- Suggest personalized outreach messages
- Predict which fundraising campaigns will perform best
- Analyze economic conditions affecting donor behavior

Benefit: More resilient, data-driven fundraising

5. Risk Monitoring and Fraud Detection

AI can monitor financial activity in real time to:

- Detect anomalies or unusual spending patterns
- Flag potential fraud or cybersecurity threats
- Alert staff about cash-flow risks before they become critical





Benefit: Better protection for the organization's

In Summary

AI gives nonprofits the tools to:




- ✓ Do more with fewer resources
- ✓ Make smarter, faster decisions
- ✓ Predict financial risks before they hit
- ✓ Strengthen fundraising and reporting
- ✓ Increase transparency and accountability

If you'd like, I can also create:

-  A full article or blog post
-  A presentation or slide deck
-  Scenario examples for nonprofit leaders
-  A tailored AI-adoption roadmap for nonprofits

Just tell me what you need!



Do you like this personality?   

Be mindful of ...



WHAT TOOLS ARE
YOU USING ?



WHAT IS YOUR
DATASOURCE(S)?



HOW ACCURATE IS
YOUR DATA?



HOW YOU ASK THE
QUESTION ?

Sage Ai

Boost efficiency, save time

AP Automation*

Available

Uses AI to streamline vendor invoice processing. It automatically creates draft bills, matches them to purchasing transactions, reduces manual entry, and improves accuracy.

Intelligent Time*

Available

Uses AI to suggest timesheet entries based on calendar, email, and app activity, making time tracking faster and more accurate.

Spot opportunities and problems early

Outlier Detection

Available

Flags unusual journal entries in real time, helping approvers spot potential errors by comparing new entries against historical patterns.

Cash Prediction & Optimization*

Coming Soon

Forecast short-term cash flow and suggest actions to improve liquidity, helping finance teams manage cash more accurately and proactively.

Get instant answers

Search Help

Available in English-speaking geos

Providing users with direct, conversational answers to product or help related questions

Advanced Search*

Coming soon

Makes it easy to ask plain-language questions and instantly find answers across your financial data

Smoother, faster close

Close Automation*

Phased launch

Streamlines and accelerates the month-end close by tracking tasks, flagging issues, and guiding teams through each step—reducing manual effort and helping you close faster with confidence.

* Additional subscription required

Sage Intacct demo.

Sage is the leader in Finance Ai and Automation.

No other provider automates more, with more accuracy, than Sage

Sage Ai
in the last
12 months:

3.2b+
transactions
processed

45m+
invoices
automated

190m+
anomalies
flagged

96%+
data
accuracy

50m+
estimated admin
hours saved

Native Ai

embedded into workflows,
working securely with your
permission

Accurate Ai

designed by Finance
Professionals, trained 7+
years with real data

Authentic Ai

you are always in control of
what Ai does for you, and what
is posted to your ledgers

Sage Ai is real(not hype), proven technology you can trust

Sage

Summary

- **NFP organisations can benefit from AI on many levels-transparency, accountability and governance**
- **Different solutions will offer different capabilities**
- **Landscape will change rapidly**
- **Always fact check/verify**



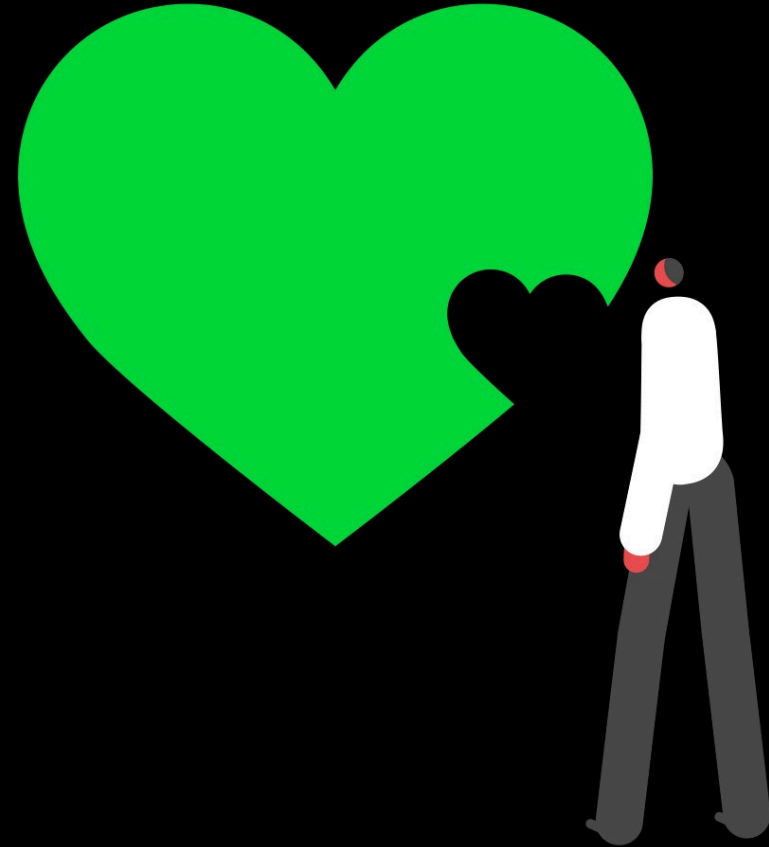
For more Information



Hobby Dean
NFP SeniorSolutionConsultant
Hobby.Dean@sage.com



Q & A



Thank you for joining us!