Complete AI Demo Guide for Movement Organizations

Your Step-by-Step Guide to Exploring the Movement Companion

Welcome to Your Demo Experience

These demonstrations show how AI can amplify your organization's impact while keeping your values and data under your control. The demo uses sample data from a fictional social justice organization — the **Community Justice Alliance** — to show real capabilities without compromising anyone's privacy.

What makes this different? This isn't about replacing human judgment or community relationships. It's about giving you powerful tools to spend less time wrestling with spreadsheets and more time building the world we need. The Movement Companion is designed for movement culture, not corporate efficiency.

Quick Start: What You Need to Know

Getting In

- **Website:** https://luisconsults.com/?demo=preview
- **Access Code:** [Provided by Luis]
- **Time needed:** 1 hour per companion
- **Data:** All fictional — Community Justice Alliance sample data

What You're Testing

The Movement Companion is a single app with **four intelligent tools** built for the humans doing movement work. Each companion has its own pre-loaded demo knowledge base and can also work with your own documents — kept completely separate.

1. **Financial Intelligence** — Makes budget planning accessible to everyone
2. **Knowledge Management** — Preserves organizing wisdom across staff changes
3. **Impact Storytelling** — Connects data with human stories powerfully
4. **Document Intelligence** — Analyzes any uploaded document with AI

Dual Knowledge Base (Data Sovereignty in Action)

The demo features a dual knowledge base system that demonstrates data sovereignty principles:

- **Demo Data mode** — Pre-loaded Community Justice Alliance documents. Always available, read-only. Chat bubbles show a "Demo Data" badge.
- **Your Data mode** — Upload your own documents, paste text, or describe your org. Session-only, processed in your browser. Chat bubbles show a "Your Data" badge. Cleared when you leave.

The two knowledge bases are completely isolated — switching modes means the companion only draws from that source, never mixing them.

Companion 1: Financial Intelligence

"Finally, budgets that make sense to program people"

What This Does

Translates between money language and mission language. Whether you're a community organizer wondering about program costs or a development director modeling funding scenarios, this companion speaks your language.

Key Capabilities

- **Budget Translation:** "Explain our finances like I'm a new board member"
- **Scenario Planning:** "What happens if we lose the Ford Foundation grant?"
- **Grant Strategy:** "Which grants have the most restrictions?"
- **Program Costs:** "What's the real cost per family we serve?"

Try These Questions

Current Operations:

- "What's our total budget breakdown for FY2024?"
- "What would happen if we lost our Ford Foundation grant ($150K)?"
- "How much does the Legal Aid Program cost per family served?"
- "What's our financial health — current ratio, reserves, risk areas?"
- "If we expanded the Youth Leadership Academy by 20%, what would that cost?"
- "Compare our revenue sources — how dependent are we on foundations?"

Grant Planning:

- "What's the Kresge Foundation grant status? Is renewal at risk?"
- "How much are we spending on community organizing vs. legal aid?"
- "What's our indirect cost recovery rate?"
- "Walk me through our cash flow challenges — when are the tight quarters?"
- "What percentage of our budget is personnel vs. programs?"

What Good Responses Look Like

- ✓ **Clear sourcing:** "According to the FY2024 Budget Report…"
- ✓ **Shows the math:** "Legal Aid costs $420,000 for 500 families = $840 per family"
- ✓ **Accessible language:** Uses terms your team actually uses
- ✓ **Honest about limits:** Says when information isn't available

Companion 2: Knowledge Management

"Institutional memory that doesn't walk out the door"

What This Does

Captures and shares the organizing wisdom your organization has built. When someone asks "How did we win that rent control campaign?" or "Who are our best legal partners?", this companion has the answers.

Key Capabilities

- **Campaign History:** Learn from past victories and challenges
- **Partner Intelligence:** Maintain relationships across staff transitions
- **Tactical Knowledge:** Share what works in your community
- **Best Practices:** Connect current challenges to proven solutions

Try These Questions

- "Tell me about the 2019 Rent Control Victory — what was the strategy?"
- "Who are our key partners for legal support?"
- "What did we learn from the 2021 Youth Budget Campaign?"
- "What happened with the 2020 transit campaign that failed?"
- "What's our history with Westside Community Church?"
- "Tell me about our relationship with Unidos Legal Services"
- "When is the best time for door-knocking in our community?"
- "What makes a successful tenant organizing campaign based on our experience?"
- "How did we double our Legal Aid capacity in 2023?"

Why This Matters

Every time someone leaves your organization, they take knowledge with them. The Community Justice Alliance experienced 40% turnover in 2022 — this companion helps ensure that hard-won lessons, key relationships, and effective strategies stay with your community.

Companion 3: Impact Storytelling

"Your data and stories, working together"

What This Does

Weaves together your numbers and narratives to show the full picture of your impact. Perfect for funders who need data, community members who connect with stories, and board members who want both.

Key Capabilities

- **Story + Data Integration:** Connect human experiences with measurable outcomes
- **Audience-Specific Reports:** Same impact, different framings for different people
- **Ripple Effect Analysis:** Show how individual changes create community transformation
- **Compelling Narratives:** Generate powerful content for different stakeholders

Try These Questions

- "Tell me a success story about our Legal Aid Program"
- "Create a brief impact summary for potential funders"
- "Show me the ripple effects of preventing evictions"
- "How does our Youth Leadership Academy change lives? Give me numbers and narrative."
- "What patterns do you see across our success stories?"
- "Write an impact paragraph for a grant report audience"

Companion 4: Document Intelligence

"Upload anything. Get answers."

What This Does

A general-purpose document analysis tool. Upload any PDF, text file, or CSV and ask questions about it. This companion works exclusively with your uploaded content — not the demo data — demonstrating how the system can analyze any organizational document.

Try This Workflow

1. Click the upload button (paperclip icon) in the chat
2. Upload a document, paste text, or use the org context form
3. Ask questions about what you uploaded
4. Notice the "Your Data" badge on responses — confirming it's using only your content

All document processing happens in your browser. Nothing is stored on external servers. Your data is cleared when you end the session.

How to Evaluate What You See

What Makes a Good Response

- ✓ **Accuracy:** Information matches the source documents
- ✓ **Relevance:** Directly answers your question
- ✓ **Context:** Includes background that helps you understand
- ✓ **Accessibility:** Uses language appropriate to your role
- ✓ **Actionability:** Suggests next steps when helpful
- ✓ **Source Attribution:** Chat bubbles show "Demo Data" or "Your Data" badges

Red Flags to Watch For

- ■ **Vague sourcing:** "Based on the data…" (instead of naming specific documents)
- ■ **Inconsistent numbers:** Different totals for the same question
- ■ **Made-up details:** Claims without clear source references
- ■ **Math errors:** Calculations that don't add up when you check
- ■ **Wrong mode:** Citing demo data when you're in Your Data mode, or vice versa

Quick Verification Tricks

1. **Ask for sources:** "What document did you get that from?"
2. **Test calculations:** "Show me how you calculated that"
3. **Check consistency:** Ask the same question different ways
4. **Cross-reference:** Ask related questions that should align

Verified Facts for Testing

Use these to check if the companion is accurate. These are the actual figures in the demo knowledge base.

Community Justice Alliance — Financial Overview (FY2024)

Metric	Value
Total Annual Budget	$1,200,000
Foundation Grants	$480,000 (40%)
Government Contracts	$360,000 (30%)
Individual Donors	$240,000 (20%)
Earned Revenue	$120,000 (10%)
Operating Reserves	4.5 months

Current Ratio	2.1
Donor Retention Rate	72%
Grant Renewal Rate	85%

Program Expenditures

Program	Budget	% of Total	Key Metric
Legal Aid Program	$420,000	35%	500 families / $840 per family
Youth Leadership Academy	$300,000	25%	200 youth / $1,500 per participant
Community Organizing	$280,000	23%	3 active campaigns
Admin & Operations	$200,000	17%	—

Major Grants

Funder	Amount	Purpose	Risk Level
Ford Foundation	$150,000	General Operating	LOW
Kresge Foundation	$120,000	Community Organizing	MODERATE (new PO)
Local Community Fdn	$80,000	Youth Leadership	LOW
Meyer Memorial Trust	$70,000	Legal Aid	LOW
City Housing Authority	$180,000	Tenant Services	LOW
County Youth Services	$120,000	Youth Academy	LOW
State Legal Aid Fund	$60,000	Legal Representation	LOW

Verified Facts: Campaign History & Partners

Key Campaigns in the Knowledge Base

Campaign	Year	Duration	Outcome
Rent Control Victory	2018-19	14 months	City ordinance passed; rent cap enacted
Youth Budget Campaign	2021	8 months	$2M city youth funding secured
Legal Aid Expansion	2023	6 months	Doubled capacity; 2 new attorneys
Transit Campaign (failed)	2020	10 months	Defeated — lesson: need anchor partners

Key Partners in the Knowledge Base

Partner	Relationship Since	Key Contribution
Unidos Legal Services	2015	Legal support, co-counsel on tenant cases
Westside Community Church	2018	Meeting space (150-person), volunteers, sanctuary
Springfield Teachers Union	2019	Education advocacy, youth program support
Metro Housing Coalition	2017	Policy work, coalition building
Housing Justice Network	2018	Rent control campaign co-strategy

Organizational Quick Facts

- **Founded:** 2008 in Springfield's Westside neighborhood
- **Focus:** Housing justice, tenant organizing, community empowerment
- **Programs:** Legal Aid, Youth Leadership Academy, Community Organizing
- **Staff:** ~13 FTE across programs + administration
- **Key lesson (2020):** "Never launch a campaign without at least 3 community anchor partners"
- **Media strategy:** Local NPR affiliate most receptive; Springfield Herald historically hostile
- **Organizing tactics:** Door-knocking most effective Oct–Mar; phone banking for rapid response
- **Staff turnover:** Improved from 40% (2022) to 15% (2024) after peer mentorship program

Demo Success Tips

Before You Start

1. **Think about your pain points:** What information is hard to find now?
2. **Identify key decisions:** What choices do you need to make soon?
3. **Consider your team:** Who struggles most with current systems?

During the Demo

1. **Start simple:** Begin with basic questions to get comfortable
2. **Build complexity:** Move to more challenging scenarios
3. **Try Your Data mode:** Upload a real doc or paste text to see it with your content
4. **Test limits:** Push boundaries to see what it can and can't do
5. **Take notes:** Document what would be most helpful for your team

Questions to Ask Yourself

- How would this change our daily work?
- What time would this save our team?
- How would this help us serve more people?
- What concerns do we have about implementation?
- How does this align with our values?

What the Movement Companion Can and Cannot Do

What It CAN Do

- ✓ Analyze complex budget scenarios quickly
- ✓ Find patterns across multiple data sources
- ✓ Translate technical information into accessible language
- ✓ Maintain institutional memory across staff transitions
- ✓ Generate reports tailored to different audiences
- ✓ Process your documents entirely in your browser (data sovereignty)
- ✓ Show which knowledge base informed each response

What It CANNOT Do

- ■ Make strategic decisions (it can only inform them)
- ■ Access real-time data (it works with uploaded documents)
- ■ Replace human judgment about your community

- Guarantee 100% accuracy (always verify important information)
- Understand local context without your input

Data Security & Privacy

In These Demos

- All demo data is fictional — no real client or organizational information
- Your uploaded documents are processed in your browser, not stored on servers
- Each session is isolated and data is cleared when you leave
- Demo and user knowledge bases are completely segregated
- No personal information is collected

In Real Implementation

- Your data stays under your control
- AI processes information without storing it elsewhere
- You decide what information the AI can access
- Full audit trails show how information is used

Troubleshooting

If the Companion Seems Wrong

1. Ask it to clarify or recalculate
2. Request the source document
3. Check the mode badge — are you in "Demo Data" or "Your Data"?
4. Try rephrasing your question
5. Note it for discussion with Luis

If You Get Stuck

- Type "help" for guidance
- Ask "what can you do?" for suggestions
- Refresh the page to start over
- Take a screenshot and ask Luis

After Your Demo: Next Steps

Discuss with Your Team

- What excited you most?
- What concerns need addressing?

- How would this fit your workflow?
- Who would be the primary users?

Identify Priority Use Cases

- Which companion addresses your biggest pain point?
- What would create the most immediate value?
- Where would you want to start?

Questions for Luis

- How is our actual data kept secure?
- Can the companions be customized for our specific needs?
- What does implementation typically look like?
- How do other organizations use this successfully?
- What ongoing support is available?

Quick Reference

Demo Shortcuts

- **Reset conversation:** Refresh the page
- **Get help:** Type "help" or "what can you do?"
- **See sources:** Ask "what's your source for that?"
- **Switch modes:** Toggle between Demo Data and Your Data on the home screen
- **Upload docs:** Click the upload button (paperclip icon) in any chat

Key Phrases to Try

- "Explain this in simple terms"
- "What are the implications of…"
- "Compare X to Y"
- "What would happen if…"
- "Show me trends in…"
- "Tell me a story about…"
- "What document did you get that from?"

Remember: This Is About Your Mission

These tools aren't about replacing the relationships and community knowledge that make your work powerful. They're about freeing up your time and energy so you can focus on what matters most: building movements, serving community members, and creating the change our world needs.

Questions or technical issues? Contact Luis