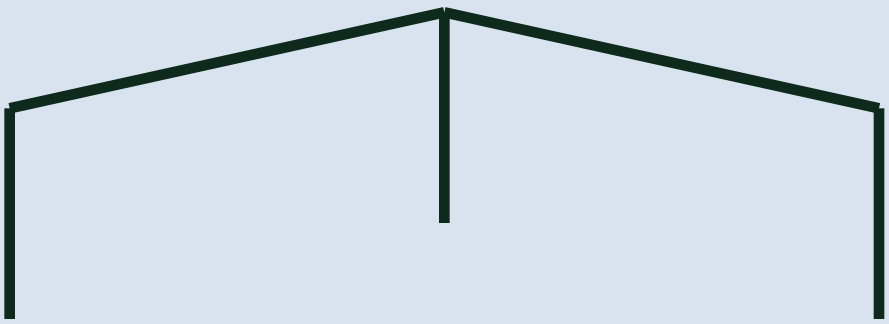
NONPROFIT DIGITAL MENTOR INC.

DIGITAL BOOK SERIES

Work Smarter With Digital Tools

A practical guide to documents, meetings, and useful workflows



A practical guide to learn at your own pace

Start where you are.

A good digital workflow saves attention, not just minutes. This guide shows how to organize a document, collaborate clearly, and make common tools work for your day.

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Start with a tidy workspace

Name things so others can find them

Use a descriptive file name and a date when helpful: 'Volunteer-schedule-2026-10'. Avoid names such as 'final-final-2'.

Choose one home for each project

Keep related files in one folder. Decide whether the shared folder or your own device is the official location.

Keep a small task list

Write the next action, not a vague goal. 'Send the agenda by Thursday' is easier to complete than 'meeting.'

TRY IT

Practice: Rename three files so someone else could identify them without opening them.

Make documents easy to use

Lead with the point

Put the purpose and requested action near the top. Use short headings so readers can scan the document.

Use built-in styles

Heading styles help with consistency and accessibility. They also make it easier to create a navigation outline.

Share the right format

Use an editable document for collaboration and a PDF when the layout should stay fixed. Confirm that the recipient can open it.

TRY IT

Practice: Turn a long note into a one-page document with a title, two headings, and one clear next action.

Run clearer online meetings

Send the reason in advance

Share a brief agenda and any document people should read before the meeting.

Check your setup

Test audio, camera, and screen sharing a few minutes early. Keep the document you will show open and ready.

End with decisions

Record what was decided, who will act, and when. Send a short recap afterward.

TRY IT

Practice: Write a three-item agenda for your next meeting and add its desired outcome.

Collaborate without confusion

Set access deliberately

When sharing a file, choose whether each person can view, comment, or edit. Avoid public links unless you intend broad access.

Use comments for questions

Comments keep discussion beside the relevant text. Resolve them when the decision is made.

Track one current version

Agree which file is the source of truth. Use version history when available instead of making many disconnected copies.

TRY IT

Practice: Review the sharing permissions on one document and remove access that is no longer needed.

Use AI tools thoughtfully

Give a clear task

State the audience, purpose, and format you want. A specific prompt produces a more useful draft.

Check every claim

AI output can sound confident while being wrong. Verify names, numbers, dates, and cited sources before sharing.

Protect sensitive information

Do not paste private client, donor, or personal details into a tool unless your organization has approved that use.

TRY IT

Practice: Ask an AI tool for three possible subject lines for a routine email, then choose and edit one yourself.

Keep what works.

You can return to any chapter when you need it. Notice what you can do now, then choose one small skill to practice next.

- [ ] My files have clear names and a known home.
- [ ] My documents put the purpose and next action first.
- [ ] My meetings end with owners and dates.
- [ ] I check AI output and protect sensitive information.

Your next small step

Write one task you will practice this week. Keep it specific and make time to try it twice.