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From Prompt to Pitch

A Collaborative AI Prompt-a-thon

Our Promise

This hands-on workshop gives you space to tackle real association challenges using trusted AI tools and practical prompting techniques. Bring Your Own Challenge (BYOC) or choose from curated association scenarios.

Working in small teams, you'll explore approaches, refine ideas, and shape workable solutions. The session wraps with a collaborative Pitchback where groups share their thinking, insights, and takeaways. Expect an engaging environment, new skills, and a clear path for aligning AI with the work you do every day.

For this workshop, you will need to bring your personal laptop.

Beginner/Intermediate



Before we get started...

Not the Sage On The Stage

Learning Together

Ideation, Rabbit Holes, Wondering, and Wandering

Safe Space

Variety of Experience and Confidence

Sample Files

Breaks

Himali's afternoon session

Around the Room



Around the Room

I use AI

1x Week

> 1x Week

1x Day

> 1x Day

I use

ChatGPT

Claude

Copilot

Others

I use

Free License

A Mix

Paid License

I prompt

A-la-carte

from Library

into Agents



This is your time until Noon

Foundations

Prompt building

Prompts and Agents



Foundations

Does your culture embrace experimentation?

The purpose of today is...

...to help all of us grow more confident, capable, and curious about Prompting

Start Small

Create Meaningful and Noticeable Improvements Along the Way

Encourage Proofs of Concept

Share Bruised Forehead and Stubbed Toe Anecdotes



3 Typical 'Flavors' of Association AI

Operations

- Helps staff do more with less, saves time, and increases efficiency

Constituent-facing (member, donor, customer, etc.)

- Facilitates user journey, provides access to information, personalization

Profession / Industry related

- How AI will change (is changing) the nature of your constituents' customer



Prompt > Library > Agent > Agentic

Prompt:

- The interaction with AI. The sequence of request, response, and subsequent iterations.
- Most often, a single 'task' per prompt -> desired response.

Prompt Library:

- The collection of saved prompts. Designed for frequent repeated use of same or similar prompts.

Agent:

- A series of prompts linked together. Multiple steps and loops usually included in an agent.
- Most often, multiple 'tasks' per agent -> desired response.

Agentic AI:

- A series of agents linked together. Agents from disparate products or companies can collaborate.
- Most often, multiple autonomous agents -> desired response.



Let's Prompt !



Today's Roadmap

Membership Intelligence Lab (Membership Retention)
Cross-Tool Compare (Conversation)
AI Agents (Building & Cooking Show)

Time Permitting

Leading AI Adoption
Governance That Works
Wrap-Up & Commitments



Workshop Materials

Membership is What Connect Us All

We all support membership within our association.

Technology, Marketing, Accounting, Research



Exploring through Prompting

Where to start?

Prompt 1: (EXPLORE)

Here are two membership datasets — one for current members, one for lapsed. As a membership director and data analyst, give me an overview of what you see. What patterns, risks, and trends stand out?

Role: *You are a membership director and data analyst*

Task: *What patterns, risks, and trends stand out?*

Format: *Give me an overview of what you see. No document, no spreadsheet, just analysis.*



Analyzing through Prompting

Prompt 2: (ANALYZE)

Now dig deeper. Break down who is churning by region, org size, dues tier, and tenure. Compare engagement and onboarding patterns between current and lapsed members. Then give me a prioritized action list with the top interventions and expected impact.

Role: *You are a membership director and data analyst*

Task: *Break down who is churning by region, org size, dues tier, and tenure. Compare engagement and onboarding patterns between current and lapsed members.*

Format: *Give me a prioritized action list with the top interventions and expected impact.*



Validating through Prompting

Prompt 3: (VALIDATE)

Before I take this to leadership, pressure-test your findings. What are the limitations of this analysis? What external factors should I consider? What additional data would strengthen these conclusions? Validate your findings.

Role: *None specified. Same as previous prompt.*

Task: *Pressure-test your findings. What are the limitations of the analysis. What external factors should I consider? What additional data would strengthen these conclusions. Validate your findings.*

Format: *None specified. Give your analysis in the chat.*

Distilling through Prompting

Prompt 4: (DISTILL)

Take our exploration, analysis, and validation, and turn this into a one-page executive summary for my board. Lead with the headline finding, include 3–4 key insights with supporting data, and close with specific recommended actions and expected outcomes.

Role: *None specified. Same as previous prompt.*

Task: *Take our exploration, analysis, validation, and turn this into a one-page executive summary for my board. Lead with headline finding, include 3-4 insights with supporting data, and close with specific recommended actions and expected outcomes.*

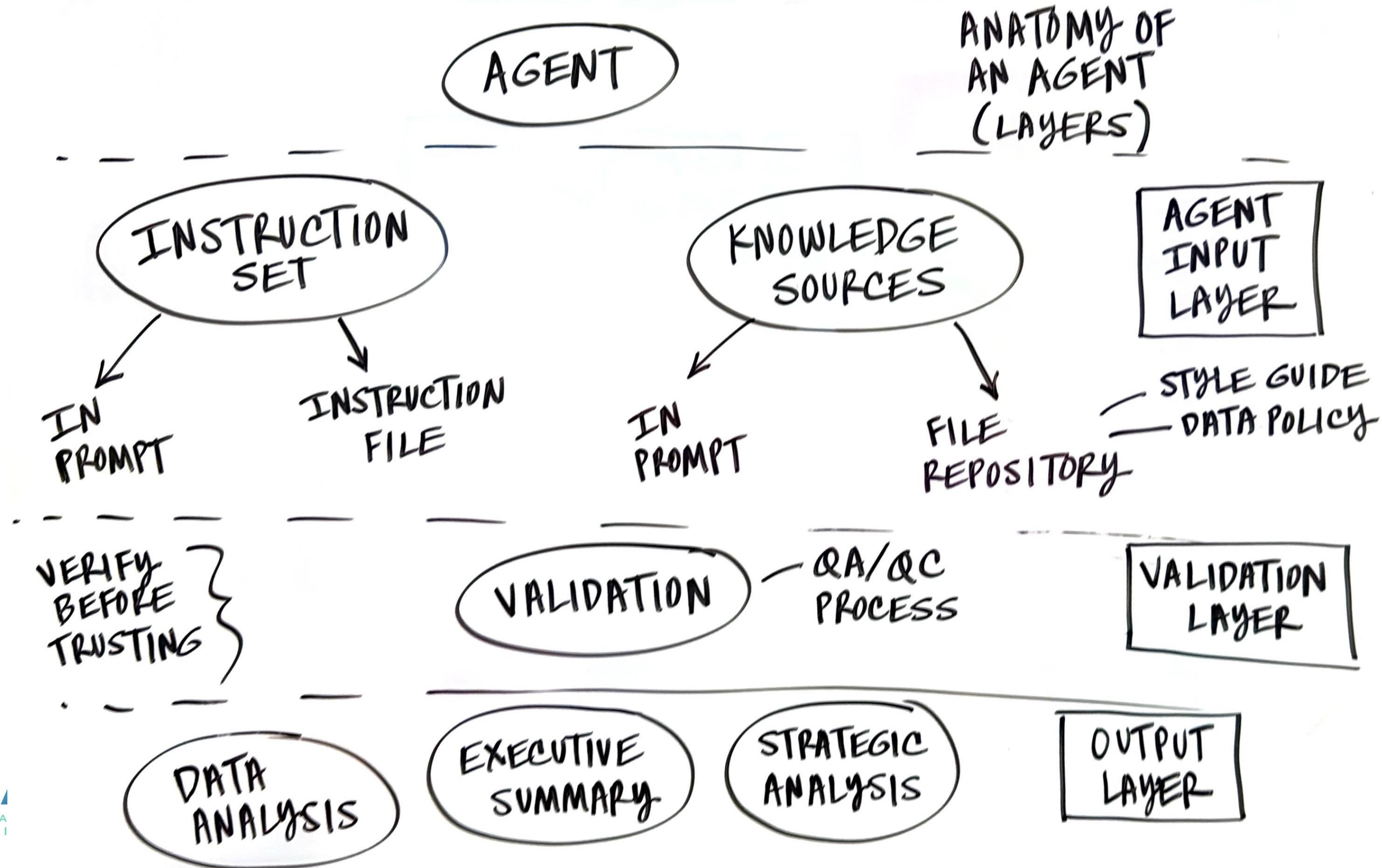
Format: *One-page executive summary. Lead with headline findings...*

Membership Intelligence Agent

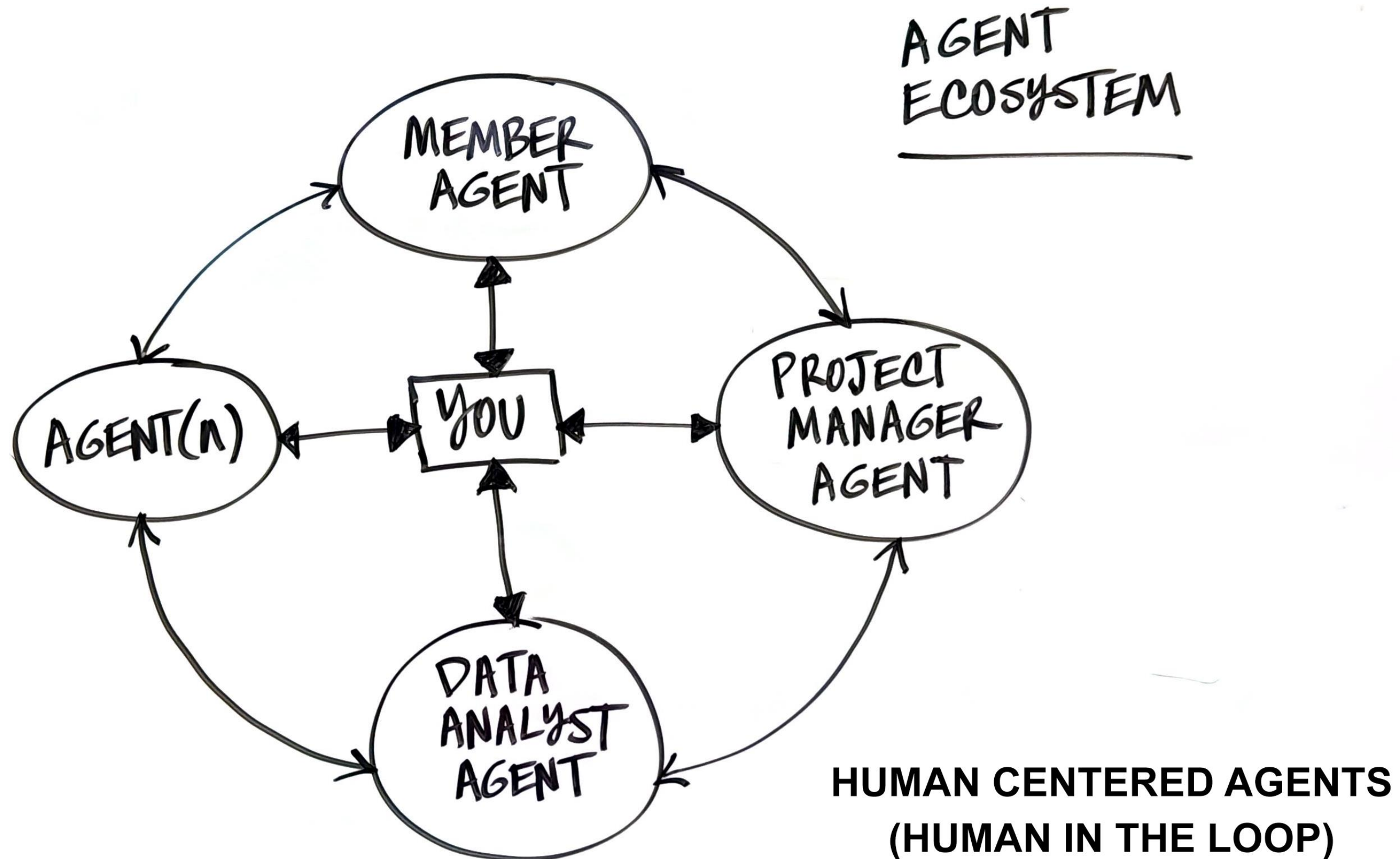
Can we build an Agent to continuously **EXPLORE, ANALYZE, , VALIDATE** and **DISTILL**?

- **What is the value?**
 - Does this analysis have value worth repeating?
 - Can I influence the outcomes of membership retention?
- **Where should I build it?**
 - What tools do I have available?
 - What data do I have available?

Anatomy of an Agent



What Next? Ecosystem of Agents



Thank You

Questions | Wonderings | Suggestions



Thank You

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QR code for Resources from session



A virtual 101

If our Prompting session content was more advanced than you were expecting, we'll host a virtual AI 101 session for you.

Please connect with Ron.

