



Strategy to Systems: Your Association's Frameworks for AI Implementation



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Be honest.

Which stage is your organization at with AI today?



Buying the gym membership. Not going.



Hitting the gym. Then eating 17 cheeseburgers.



Actually training. With a plan. And a coach.

This session is for all three. Let's talk about what it actually takes.

Raise your hand if any of this sounds familiar.



"We need to get into AI." — said at the last three board meetings, zero budget allocated.



Someone on your team is already using ChatGPT. You have no idea what data they're putting in.



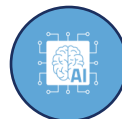
"We hired someone to figure out the AI stuff." That person has never built an AI tool in their life.



You bought the Microsoft Copilot seats. Two people are using it. Occasionally.



IT says don't use it. Leadership says use it. Staff across teams, from marketing to membership, are confused. Nobody wins.



You had a cybersecurity incident. You patched it. You haven't thought about it since.

You're not alone. But staying here is a choice.

AI Adoption in 4 Steps

From learning faster to reimagining how you work.

Each step scales up your organization, like a training program designed to make your whole team stronger, not just one person.

4

AI + Mission

AI is built into your systems, secured inside your tenant, and working for your mission around the clock.



REIMAGINE & GROW

This is where IT stops being a constraint, and starts driving your mission forward.

3

AI + Synergy

With shared AI tools, recorded meetings, collective knowledge, your whole organization starts moving in the same direction.



CLICK AS A TEAM

2

AI + Workflow

AI helps you write, summarize, and move through your daily work faster, without changing how your team operates.



REBUILD HABITS

1

AI + Research

Get instant answers and stop losing time to things you could know in seconds.



RESEARCH FASTER

AI is a team sport.

(Your IT team, security team, and training team all need to be on the field.)

What we see happening:

- "IT owns AI." → Staff avoids it.
- "Staff owns AI." → No guardrails. Data goes everywhere.
- "The budget owner owns AI." → Everybody's talking about it. Nobody's doing it.
- "We'll figure out security later." → You won't. And later will cost more.
- "We did one training." → Three weeks later, nobody remembers.

What actually works:

- One team. Three disciplines — AI, Security, Training — working from the same roadmap.
- Training your staff as technology evolves, not once a year or once total.
- Security built into the AI program from day one, not bolted on after an incident.
- A partner who thinks about all three, so you don't have to manage three vendors.

This is not a technology problem. It's a strategy problem.

AI Is Not a Software Problem. It's a Workflow Problem.



The AI Fitness Test.

Where does your organization honestly land on each of these?



AI Adoption

Starting Out

Nobody's using it consistently

Making Progress

A few champions. Everyone else is watching.

Leading Edge

Cross-department adoption with real use cases



Security Posture

Starting Out

"We haven't had an incident yet"

Making Progress

Some policies, but they aren't enforced or tested.

Leading Edge

Documented, trained, tested, monitored



Training Culture

Starting Out

"We did a session last year"

Making Progress

Occasional, without formal structure or tracking.

Leading Edge

Ongoing, role-specific, tied to tool adoption

Most associations are yellow in all three. The goal is green across the board, which doesn't happen by accident.

What are you actually trying to achieve?

When you join a gym, you have a goal. Lose weight. Build muscle. Just get some movement in your day.

The same is true for AI and your operations. Potential goals could be:

Retain more
members and
reduce lapse rates

Grow non-dues
revenue through
smarter engagement

Create operational
efficiencies so your
team can do more with
the same resources

Deliver a better
member experience
without adding
headcount

Think about this like a gym membership.

1

The Membership

AI Tool Only

You bought ChatGPT. Maybe Copilot.
People log in occasionally, but nobody
trained on it. There's no plan
or accountability.

You have a gym card collecting dust.

2

The Gym + Cheeseburgers

AI Without Security

Your team is using AI. That's great!
However, staff are pasting sensitive data
into free tools. No guardrails, no
governance, no oversight.

You're undoing every rep you put in.

3

The Personal Trainer

AI + Training + Security

A plan. A coach. Accountability. Your team
actually knows how to use the tools, and
your data stays protected while they do.

This is how you actually get results.

Three things. One strategy.

You can't skip any of them. You can't do them in isolation. They only work together.

01



AI

Adopt it strategically.

- AI should be a layer that connects every tool, every dataset, every department.
- Know what problem you're actually trying to solve.
- Start with one use case or workflow, like content creation or member communications. Build from there.

02



Security

Protect the investment.

- AI changes how your data is accessed and surfaced
- Security built into your program from day one means your mission isn't at risk
- Data governance, access controls, and monitoring all get tested, ready for any threats.

03



Training

Make it stick.

- Buying the tool is the easy part. Getting your team to actually use it is the job.
- Spaced, repeated learning is what actually makes new tools stick.
- The tools your team is using today will look different in six months. Training has to keep pace.

Your 30/60/90-Day Path to AI That Actually Works



30 Days: Explore Identify one problem worth solving and the team that owns it. Take stock of what's already in your Microsoft 365 environment. Get clear on what success looks like before you start.



60 Days. Build Launch one, repeatable workflow. Establish your governance basics: approved tools, data handling, human review checkpoints. Bring security into the conversation now, not after something breaks.



90 Days. Scale Measure what changed and find the next opportunity. Connect the workflow to adjacent departments. Build in ongoing training so momentum doesn't stall when the tools evolve.

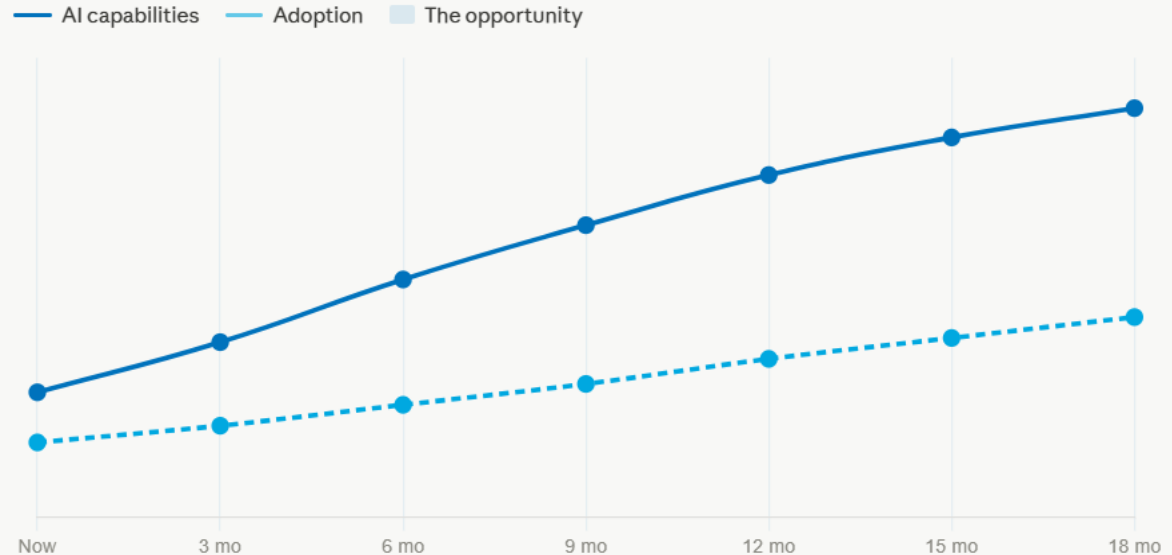
Think 18 months out for your AI strategy

AI is moving too fast for a three-year plan. Don't worry too much about the pitfalls, just get started.

Remember, the gym membership gets you in the door. The program gets you the outcomes you want and need.

1 Pick a direction.

2 Build a flexible strategy.



The goal: keep your organization as close to that upper line as possible.

How can you put AI to work, right now?

Real prompts. Real use cases. Right now.



Membership

"Which members show the same engagement drop we saw in the 40 who didn't renew last year?"

Targeted outreach before it's too late, not a mass email after they leave.



Marketing

"Write three versions of our fall conference promotion: one for a Gen Z staff member, one for a Boomer exec, one for a mid-career manager."

Creates messaging that actually reaches people where they are.



Communications

"Summarize last quarter's legislative activity for a member newsletter. Plain language. Max 150 words. Optimistic tone."

More content. Less bottleneck. Your voice, not a robot's.



Technology

"Build a Member Monitor dashboard: flag at-risk members, rank by renewal probability, suggest next best action."

Follow a proactive strategy. Leave reactive cleanup behind.

Member Monitor.

AI-powered member engagement intelligence, built for associations.



Real-time engagement scoring

Know which members are active, drifting, or at risk before renewal season.



Behavioral segmentation

Group by actual behavior, not just join date, dues tier, or chapter.



Renewal prediction signals

Surface the members most likely to lapse. Intervene early. Win more.



Runs inside your M365 tenant

Your data never leaves your environment. Secure by design, not by luck.



This is what Step 4 looks like.

AI + your data + your platform. Reimagining what's possible, not just automating what's already broken.

Leave with three things.



AI is the opportunity. But only if it's strategic, secure, and supported with training. The gym membership alone won't get you there.

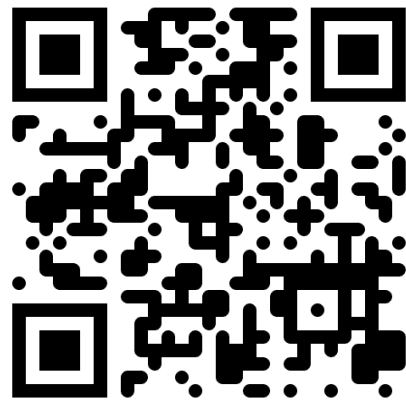


Security is the diet. You can train hard every day. If the cheeseburgers keep coming, you're stuck. Protect the investment.



Training is the coach. Tools change. Your team has to keep up. That's not a one-time event. It's a program.

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**SCAN TO SEE
WHAT'S POSSIBLE**



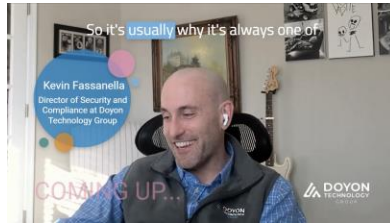
**What does an AI-native
association look like?**

Most organizations use AI tools. This guide shows what happens when you build it into how you actually operate.

Resources for your Organization

Visit the ASAE Prompt Library:

<https://www.designdata.com/asae-prompt-library/>



Security Gets Expensive
When You Defer It

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When Associations Ask for an IT
Assessment, Here's What They
Actually Want

[CLICK TO VIEW](#)



AI Is Not a Software Problem.
It's a Workflow Problem

[CLICK TO VIEW](#)



FREE EVENT

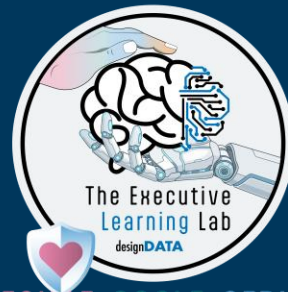
Join us at the Executive Learning Lab

June 25 | 10 AM – 4 PM | Tower Club, Tysons Corner

Hear directly from peers who have implemented AI in their organizations

Learn what a real cybersecurity strategy looks like for associations

Leave with practical next steps, not just inspiration.



SECURE. SCALE. SERVE.



SIGN UP HERE



The gym is open. Your trainer is ready.

Now, stop eating the cheeseburgers.

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Let's build your program.

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