



Accelerating AI Thinking & Readiness at AMCs

PLUS Powering Your AMC with Agentic Agents

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Senior Director of Industry Relations and Thought Leadership

Industry-leading Solutions for Associations and Nonprofits

AI-POWERED PLATFORM

Momentum IQ

AI Analytics AI Agents Widget Library Open Integrations

ASSOCIATION MANAGEMENT



EVENT MANAGEMENT



CAREER CENTER



VOLUNTEER MANAGEMENT



ACCOUNTING



LEARNING MANAGEMENT



CERTIFICATION MANAGEMENT



FUNDRAISING



About Me



**Rich Vallaster, CEM,
AAiP, QAS**

Senior Director of Industry Strategy



I've spent my career working closely with associations, nonprofits, AMCs, and events. Gaining firsthand insight into the operational engines that power them, especially when resources are stretched thin.

From conducting CEIR research and providing IAEE leadership to teaching in the CEM program, I focus on how AMCs amplify impact for every client, not just one association at a time.

Last year, I earned the Certified Association AI Professional (AAiP) designation. When you're managing multiple associations with a lean team, AI is no longer optional; it's essential to staying ahead.

Helping AMCs move from AI experimentation to operational intelligence.

Built for Every Level in the Room

THIS SESSION MEETS YOU HERE



200

New to AI

300

Using it daily

400

Building workflows

Practical, not theoretical

You'll leave with something to use now, not a lecture on AI history.

Participatory, not a lecture

You'll learn from each other in the room, not just from me.

Leveled to the room

Beginner questions welcome. Advanced ideas too.

What this isn't: a rundown of every AI model, AI hype or fearmongering, or theory disconnected from your day-to-day.

01

Audience Poll

A quick pulse check before we dig in.

Why should associations hire an AMC?

Shout it out.



AI in AMCs

Gaining Slowly...

AMC EMPLOYEE OF THE MONTH



JANUARY



FEBRUARY



MARCH



MAY



JUNE



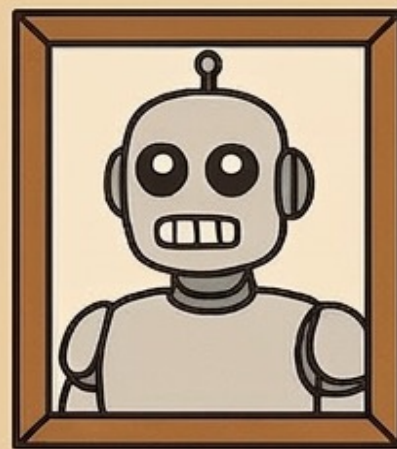
JULY



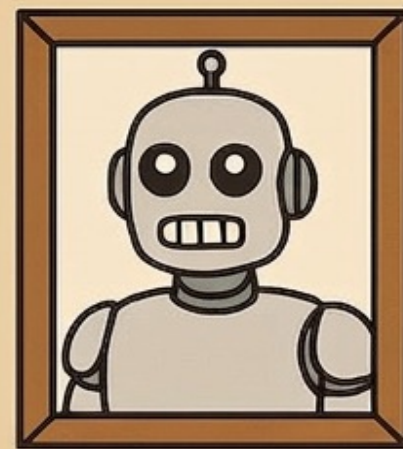
AUGUST



SEPTEMBER



OCTOBER



DECEMBER

02

AI Is Evolving Faster Then Most AMC Workflows

Are you (and your) AMC evolving with it?

A full-page photograph of a conductor in a dark tuxedo with a white bow tie, standing and gesturing with his right hand while holding a baton in his left. He is facing a large orchestra of musicians seated in a grand, ornate concert hall. The musicians are playing various instruments including violins, violas, cellos, double basses, flutes, and brass instruments. The hall has high ceilings, gold-colored architectural details, and tiered seating filled with an audience. The lighting is warm and focused on the stage.

AI Doesn't Replace
the Conductor.

It Hands You a Bigger Orchestra.

03

The AMC Reality

AMC teams are expected to deliver strategic thinking across multiple clients, industries, boards, and operational realities, often with limited staff and time.

Clients don't hire you to save time.

They hire you to think.

AI helps you do both.

04

The Tools

Tool selection matters less than organizational adoption and workflow integration.

QUICK POLL

What AI tools are you already using?

Shout it out. Let's see what's already in the room.



The best tool can depend on the task.

Tool	Organizational Uses
ChatGPT	Strategy and content
Claude	Long-form analysis & document review
Perplexity	Research
Co-Pilot	Your organization has it bundled in your Office Suite
SparkIt.AI	Event specific
Adobe Creative Suite	Creative needs (concepting, images, etc.)
Event, Learning and Association Management Systems	Connecting event, learning and association data for deeper insights and analytics

Use what you are organization and client approved (and advocate for others).

Pro Tip: <https://theresanaiforthat.com>

05

What Does AI Readiness Look Like for AMCs?

How do we move beyond it?

*Some of this may seem obvious,
but these are often the barriers slowing progress.*

Readiness: Data Hygiene

Bad Data = Bad AI

Associations often struggle with fragmented, inconsistent data, but AMCs are uniquely positioned to not only help fix it, but you can also find patterns and scalable solutions across clients.

Not All-or-Nothing

Not every AI use case requires perfect data (or data at all) to create value.

Empowerment

Training and AI education. Data audits, governance, and policy become even more critical in an AI world.

92% of association executives are using AI, but only 6% to 13% have an AI policy according to ASAE.

Who is driving the AI policy
(you or your clients)?

Readiness: Discovering and Showcasing Value

Internal

Identify pain points or areas of frustration in each functional area of your AMC. Showcase wins. Dedicate time and SHARE and prompts and ideas across teams.

Client Facing

Many associations (your clients) share the same challenges. What can you solve at scale across your clients? Audit individual clients for their specific pain points.

Turn Readiness Into Revenue

How do we move beyond it? By productizing what you build.

- 1 Sell the agent, not just the outcome:** Package a built agent as a standing AI-powered engagement service line item for clients.
- 2 Add an AI-accelerated tier:** Offer it alongside your standard service tiers: faster turnaround, deeper insight, for clients who want to pay for it.
- 3 License your playbooks:** The client profile and prompts you build once become a sellable framework you can offer prospective clients too.
- 4 Bill for insights, not just hours:** Move from billing for staff time to billing for the data-driven recommendations only an AI-augmented team can produce at that volume.

06

Prompting for Strategic Thinking

Tips for Better Prompting

1 – Assign AI a Strategic Role

Don't just ask AI for answers.

Tell it who should be answering the question.

- Member retention strategist
- Educational design strategist
- Association governance consultant
- Sponsorship and exhibit sales consultant
- Member engagement analyst

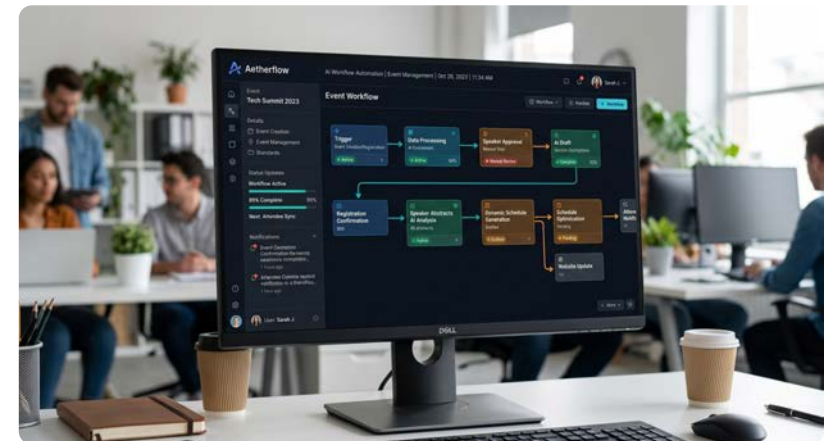
...and many others (think of who you would like to hire)



2 – Be Specific

AI tools reward operational detail. The more context the prompt provides, the more strategic the output.

- Define the audience, objective, and constraints
- Use “do” and “don’t” instructions
- Specify what to exclude or prioritize
- Add context and stakeholder perspectives
- Clarify budget, staffing, timeline, or limits



3 – Define the Business Outcome

*Too many people ask AI to make things.
What problem are you trying to solve?*

- Define the desired outcome or deliverable
- Clarify what success looks like
- Ask AI to prioritize recommendations
- Include operational goals and constraints
- Tie outputs to attendee, exhibitor, or revenue impact



4 – Ask AI to Think Like a Strategist

Include these in your request:

- Analyze tradeoffs
- Prioritize recommendations
- Identify blind spots
- Anticipate objections
- Challenge assumptions
- Think from multiple stakeholder perspectives



5 – AMC Specific Prompts to Try

Build once, reuse everywhere.

- Identify the five riskiest requirements in this RFP and draft a clarifying questions list.
- I have a quarterly check-in with [CLIENT]. Here's their dashboard. Identify two things to celebrate and two risks to raise proactively.
- Draft a 90-day onboarding plan for [NEW CLIENT] based on what we learned when we onboarded [SIMILAR CLIENT].
- We're presenting to _____ association. Review their website and tell me the three biggest gaps we should address in our pitch.



What Better Context Looks Like

Without Context

“Write a renewal email for our client XYZ association members.”

With Context

“You are our Membership Assistant for XYZ client. Sarah hasn’t renewed in 45 days, opened our last 3 emails but didn’t click, and attended 2 events this year. Draft a renewal email that references her event engagement specifically, offers a call with her chapter liaison, and flag it for human review before sending.”

Same tool. Same model. The difference is entirely in what you give it to work with.

Mini Prompt-a-Thon

AT YOUR TABLE · 5 MINUTES

- 1 Share one repetitive task at your AMC.
- 2 Assign AI a strategic role.
- 3 Be specific: audience, objective, constraints.
- 4 Define the business outcome.
- 5 Let's share and test it.

Goal: share out loud and leave with one prompt you'll actually reuse this week.

07

Training AI Around Your AMC Ecosystem

Building AI that already knows your clients,
so you stop starting from scratch.

Building Reusable AMC Client Intelligence

Scalability Across Clients

Support multiple associations (clients), adapting messaging, workflows, and more.

Customization by Vertical

From healthcare to trade to education associations, unique terminology and regulatory nuances can be reflected.

Consistency in Quality & Accuracy

Uniform output across very different associations. Retains institutional knowledge so staff don't start from scratch. If your AMC runs on EOS, this is exactly where it plugs in, the same discipline behind your Rocks and Scorecards, applied to client intelligence.

HAND RAISE

Raise your hand: How many of you are training your AI tools? (Be Honest)

Not just using it, teaching it your voice, your rules, your context.

Training and Customizing Your AI Tools

*Think of AI like a new team member or new to associations.
It needs clear instructions before it can do great work.*

- First-time attendees: avoid insider jargon
- Long-time members: acknowledge history and loyalty
- Sponsors: emphasize ROI, leads, and exposure, not community language
- Certification prep: always use compliance-focused language
- Board summaries: keep responses concise and risk-aware
- Board-facing content: use data-forward, conservative language

Creating Client Voices

Gather blogs, essays, or emails that reflect the voice you want the AI to emulate, then ask it to analyze and summarize the style.

- Collect writing samples or links to existing content
- Ask AI to analyze tone, vocabulary, and sentence structure
- Have it summarize the style, including recurring themes
- Save the summary as a reusable voice prompt

Custom GPTs

Create a 1–2-page AI profile per client that becomes a reusable prompt starter.

- Mission, tone, voice guidelines, and website(s)
- Core programs: events, certification, advocacy, education
- Member, exhibitor, sponsor, and partner personas
- Key terminology and acronyms
- Operational workflows
- Recurring client challenges and historical insights
- Board preferences

Microsoft Already Built You a Coach



MICROSOFT 365 COPILOT • PROMPT COACH

A free, pre-built agent inside Copilot Chat and Microsoft 365 Copilot. It reviews your prompt, tells you what's missing, and rewrites it, the same role, specifics, and outcome structure this whole session just walked through.

- Reviews a prompt you already have and suggests improvements
- Builds a strong prompt from scratch if you're starting blank
- Explains why the better version works, so you improve on your own next time

Free with Copilot Chat. Look under Agents, Built by Microsoft, for Prompt Coach, and ask it to fix a prompt you already use.

08

Moving Beyond Efficiency

Transforming with Foresight

STRATEGY ALIGNMENT IS MISSING

Your client's member data is already a goldmine. Most AMCs are sitting on it.

Event attendance could inform retention. Financial transactions could flag your best upsell targets. The dots are already there. Almost nobody connects them.

Predict. Personalize. Optimize.

Where association and AMC AI is heading.

Predict

- Membership churn risk
- Event attendance forecasting
- Financial risk & revenue trends
- Which client relationships are becoming unprofitable, before the renewal conversation forces the issue.

Personalize

- Personalized member journeys
- Learning & certification pathways
- First-time member experiences

Optimize

- Staff workflows & capacity
- Revenue & pricing strategy
- Cross-client workflow scalability
- Which clients to let go of, so your best team time goes to your best-fit accounts.

09

AI Agents

What They Are. How They Work. Where to Start.

Before We Continue: Not That Kind of Agent

What The Worry Is

- Plots world domination
- Turns against its creators
- Requires Will Smith to stop it

What This Actually Does

- Drafts a renewal emails
- Flags a data mismatch
- Watches a Slack channel
- Requires you to hit approve

The AI agents in this room want to help you hit your Rocks, not achieve consciousness.

What Are AI Agents?

Chatbots respond. Agents act.

92%

of associations have already
adopted AI tools

7%

report real organizational impact from it

That gap is exactly where agents come in.

How They Work

THE AGENT LOOP



The Guardrails That Matter

- Human-in-the-loop**
Your team reviews and approves before anything goes live.
- Audit trail**
Every action is logged: what it did, and why. No black box.

- No rip-and-replace**
Runs inside the systems you already use.

Six Agents You Can Build Now

Ranked by how directly they fit the AMC model. Start near the top.

Data Consistency Checker

Compares two sources, roster vs. billing, agenda vs. website, and flags mismatches.

GREAT STARTER, NO SENSITIVE DATA

Renewal & Retention Assistant

Drafts personalized renewal outreach & flags at-risk members using engagement history.

SOLVES YOUR #1 CHURN PROBLEM

Cross-Client Report Builder

Pulls the same metrics across every client association into one formatted report.

BUILT FOR THE AMC MODEL

Sponsor & Exhibitor Recap Agent

Drafts benefit-status language and post-event recaps using placeholders you fill in.

SAFE NEAR SENSITIVE DATA

RFP & Proposal Response Assistant

Drafts responses to new-client RFPs using your firm's boilerplate and the specific ask.

WINS NEW CLIENTS

Client Onboarding Profile Builder

Interviews you about a new client association and writes its reusable AI profile.

BUILDS YOUR REUSABLE INTELLIGENCE

Full build instructions for all six are in the Building Your First Agent guide.

Live in 5 Steps: Data Consistency Checker in Claude

The safest of the six to demo live. No sensitive data required.

- 1 Open a Project:** In Claude, click Projects, then Create project. Name it “Data Consistency Checker.”
- 2 Set its instructions:** Paste in: “Compare two sources I give you and list every mismatch. Never resolve one on your own, only flag it.”
- 3 Add two sample lists:** Paste or upload two versions of the same list, like a roster export and a billing export, with a few intentional mismatches.
- 4 Ask it to compare:** “Compare these two sources and list every mismatch you find.” Watch it flag what’s actually different.
- 5 Save it, reuse it:** The project stays saved. Next time, just drop in new files, no rebuilding from scratch.

Meet the AI Agents (that already exist)

Membership Assistant

Runs your engagement cycle: converting prospects, onboarding new members, nurturing active ones, and winning back lapsed ones. Starts each day with a brief so your team already knows what to do.

Runs on a trigger: watches renewal windows and engagement drop-off on its own. No prompt required.

Online Community Manager

Keeps community spaces moderated without adding headcount. Auto-flags content against your standards, quarantines instead of deletes, and learns your rules over time.

Runs on a trigger: watches continuously and flags the moment a post breaks the rules. It doesn't wait to be asked.

10

Ask Yourself

How do I become more AI strategic at our AMC?

The Vision: From Pilot to Product Line

Some of you are already further down this list than others. Wherever you are, the move is the same: keep going.

- 1 **Pilot one workflow:** low risk, high frequency, a clear metric. Many of you are already here.
- 2 **Train it on your clients:** give it voice, context, and guardrails so it's not just a good prompt, it's reusable.
- 3 **Turn it into an agent:** something that runs on its own, not something you retype every time.
- 4 **Reuse it across every client:** the multiplier only an AMC gets.
- 5 **Productize it:** what you built for one client becomes a new revenue line for all of them.

**The AMCs that figure this out
won't just save time.**

*They'll sell it, as a new billable service,
built once and offered to every client.*

Connect with Me



Email or Meet With Me

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momentivesoftware.com

<https://calendly.com/richvallaster/>



Get the Deck & Resources

PowerPoint Slides and
Agent Builder



Connect on LinkedIn

Scan to connect
[linkedin.com/in/richvallaster](https://www.linkedin.com/in/richvallaster)

Wrapping Up

It's your turn.



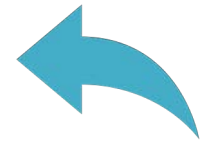
Questions

What do you
need to act?



Challenges

What gets in
the way?



Pushback

Where does your
AMC differ?

Thank You

