

AI TOOLKIT: QUICK START

For association leaders ready to launch a safe, strategy-aligned pilot.

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At a Glance

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Foreword



“My vision is to shorten the distance between curiosity and capability.”

Cathy Lada D.Sc., CAE, AAiP,
President

Association leaders keep telling me the same thing: "We know we should be doing more with AI. We just don't know where to start." This quick-start version is for leaders who want to launch a pilot in the next 90 days without reading the full toolkit first. The full version is available at www.cathylada.com/insights when you're ready for more depth. My vision is to shorten the distance between curiosity and capability. Not by turning you into AI experts, but by helping AI become part of how your association does its best work.





Introduction

This toolkit is for association professionals who have not yet developed expertise in generative AI tools. It's an introduction to generative AI use in associations, so if you have been tasked with "implementing AI" at your association, or have tried with poor or inconsistent results, this toolkit is for you.

At the same time, this toolkit covers the basics; it is not meant to be an exhaustive manual. For example, this toolkit is focused on prompting rather than coding or AI agents. Those toolkits will be coming later in 2026.

Get updates

Subscribe to my newsletter at www.cathylada.com/insights.

Why use this toolkit?



MANAGERS:
Reduce inefficiency,
standardize quality,
build adaptable
teams.



ASSISTANTS & COORDINATORS:
Speed up
recurring tasks,
reduce blank-page
work, build
daily AI habits.



C-SUITE LEADERS:
Accelerate
adoption,
reduce risk,
improve workforce
productivity, build
innovation culture.

1. Anchor AI to Your Strategy

Before you pick a tool, recruit a pilot, or write a policy, answer one question:

what strategic priorities will AI work serve at our association in the next 12 months?

AI doesn't change your strategy. It changes what you can deliver on. Associations that already know what they want to do can do more of it, faster, with AI.

Associations that don't know what they want to do won't find the answer in an AI tool.

The 30-minute strategy conversation

Get the executive director, the AI initiative owner, and one or two department heads in a room. Answer four questions:

1. Which two or three strategic priorities will AI serve this year?
2. What member or organizational outcome should each priority advance?
3. What will AI not be used for, based on mission and values?
4. How will we know it's working in terms the strategic plan would recognize?

Document the answers in one paragraph. That paragraph belongs in the leadership message that opens your pilot, in your AI policy preamble, and in your pre-pilot board briefing. It's the strategic anchor for everything that follows.

If you don't have a current strategic plan

Two defensible paths. Pause the AI work and build a strategic plan first. Or run AI as a structured six-month exploration whose explicit goal is to surface what should be in the next strategic plan. Either is defensible. Drifting between them is not.

2. Set the Safety Foundation

Before any staff member uses AI for real work, you need two documents and one decision.

The two documents

An AI policy. A formal document that covers governance, data privacy, ethical use, vendor requirements, and incident reporting. It should be reviewed by IT and legal. State laws, federal regulations, and industry-specific rules vary, and associations in healthcare, finance, and insurance need extra precautions. The full toolkit lists what to include.

A one-page staff guide. This is the version your team will actually consult before pasting member data into a tool. Short enough to scan, specific enough to answer the question in front of them. Together, the policy and the one-pager do what neither does alone.

What must never go into a public AI tool

Write this list down and share it with every staff member:

- Member data of any kind
- Financial data, budgets, and forecasts
- HR information and personnel files
- Confidential documents and board materials



- Legal matters and contracts
- Passwords and credentials
- Proprietary strategy documents
- Personally identifiable information

If a staff member is unsure whether something belongs on this list, the answer is yes until proven otherwise.

The decision: free, paid, or enterprise

Free and personal-paid AI accounts are fine for low-risk experimentation. Anything touching the prohibited list above belongs on a Team or Enterprise tier where the vendor agreement says your inputs are not used for training and your organization controls the data. This is non-negotiable for your base AI assistant.

The principle staff needs to internalize

AI output is a draft, not a decision. Every output gets human review before it goes external. Every fact gets verified. Every member of staff is fully responsible for what they sign their name to, even when AI helped draft it.

3. Pick Your Tools and Run a 90-Day Pilot

Here's the shortest defensible path from "we should try AI" to "we have evidence and momentum."

Month 1: Normalize and Prepare

Week 1. The executive director sends a short "we are learning together" message to staff. Name the approved tools. Connect AI to the strategic priorities you identified. Run a quick anonymous survey: which AI tools is staff already using, for what, and how confident do they feel on a 1 to 5 scale?

Week 2. Convene IT, HR, legal, and operations to align on what data can and cannot enter public AI tools. Draft the AI policy and the one-page staff guide. Confirm whether enterprise versions are needed. Get a legal review of your policy.

Week 3. Distribute the one-pager at an all-staff meeting. Open a Slack or Teams channel for AI conversation. Run one or two low-stakes activities to break the ice (rewrite a boring email in three tones, write a haiku about board meetings, brainstorm conference session names).



Week 4. Recruit 2 to 10 staff for the pilot. Include at least one person from membership, education, events, marketing, finance, advocacy, and operations. Brief each person to identify two to three real recurring tasks to test.

Month 2: Pilot, Learn, Train

Week 5. Pilot kickoff. Each member shares their chosen tasks publicly. Hold a 30-minute "writing a better prompt" microlearning session and record it. Each pilot member starts a personal log: prompts tried, what worked, what didn't, time saved.

Week 6. First show-and-tell. Pilot members share early wins and failures in a 30-minute all-staff meeting. Run a "Hallucination Hunt" activity: give staff an AI-generated answer with intentional errors and have them identify what to verify before use. Microlearning topic: summarizing a document.

Week 7. Each pilot member picks one use case relevant to their team. Microlearning topic: rewriting for tone. Begin documenting successful prompts in a shared repository.

Week 8. Mid-pilot retrospective. Pilot members report time saved, quality changes, and friction points. Update the one-pager based on what was learned. Decide which use cases are ready to scale.

Month 3: Scale, Sustain, Measure

Week 9. Invite pilot members to become department champions. Define the role explicitly: one use case shared per month, one office hour per quarter. Choose one team workflow to build a custom assistant for. Name the bot's owner.

Week 10. Build and test the team-level custom assistant. Write its instructions: what it does, what it refuses to do, what voice and format it uses. Upload only the knowledge sources it needs and confirm none contain prohibited data. Test within the team, including at least one prompt designed to make the bot fail.

Week 11. Open enrollment for broader staff. Champions host office hours. Run an "AI prompt contest" to drive engagement. Publish the use case repository internally.

Week 12. Repeat the confidence survey from Week 1 and compare results. Track staff trained, use cases shared, estimated time saved, risks surfaced. Schedule a 6-month policy review and ongoing monthly show-and-tells. Decide whether to invest in enterprise tools or additional training.

What to measure

Adoption metrics (immediate): staff trained, use cases shared, time saved, confidence scores before and after.

Strategic outcome metrics (slow, over 12 to 24 months): Did AI work improve a member-facing metric (renewals, satisfaction, response times)? Did it advance a mission-level goal (reach, accessibility, capacity)? Did it move a strategic plan KPI?

Adoption metrics tell you the program is running. Strategic outcome metrics tell you it's working. Track both.

4. Pick Your Tools

Don't overthink this. Most associations end up with two tools in regular use: one embedded in their productivity suite, one standalone chatbot.

The four major AI assistants

Tool	Best for
ChatGPT	A versatile generalist. The most widely adopted, with the largest pool of staff who already know how to use it.
Claude	A thoughtful writing partner and long-document specialist. Strong on natural prose, careful reasoning, and policy work.
Microsoft Copilot	Embedded in Microsoft 365. Best when staff already live in Word, Excel, PowerPoint, Outlook, and Teams.
Google Gemini	Embedded in Google Workspace. Strong on long inputs and multimodal work.

The shortcut. If your association already pays for Microsoft 365 or Google Workspace, the embedded option is usually the easiest first step. Add ChatGPT or Claude when staff need a more capable standalone assistant for writing or building custom assistants.

Specialty tools to add as needed

- Meeting notes: Otter.ai, Zoom or Teams note-takers
- Standard operating procedures: Loom, Scribe
- Video editing: Descript, Canva
- Presentations: Gamma, Beautiful.ai
- Infographics: Venngage, Napkin



- Editing: Grammarly
- Speech-to-text: Wisprflow.ai
- Speaker coaching: Yoodli

Start with one to three specialty tools that match your highest-friction workflows. Add others as the value gets proven.

A note on the changing landscape

Specific feature gaps narrow every few months. Train staff on prompting and output evaluation skills that transfer across tools, rather than just on one platform's interface. The tool you standardize on this year may not be your best option two years from now, and that's okay.



5. Avoid the Five Biggest Mistakes

Most failed AI rollouts trace back to one of these.

Skipping the strategy conversation. AI without strategy produces tool sprawl, not transformation. Pilots succeed, individual staff get faster, and the association as a whole doesn't move forward in any direction it chose deliberately. Start with strategy.

Leadership says "use AI" but doesn't model it. Executives who never use the tools themselves leave managers to enforce something leadership hasn't visibly embraced. Ask executives to share one personal AI use case per quarter. Visible curiosity from the top is worth more than any training program.

Long workshops instead of microlearning. Two-hour AI trainings get forgotten in a month. Five to ten-minute lessons embedded in existing meetings, anchored to a specific recurring task, build durable skill.

Trusting AI output without verification. Staff become comfortable, start trusting drafts as facts, and stop checking. The "Hallucination Hunt" activity should be repeated, not done once. Pair AI use with stronger editorial standards, not weaker ones.

Losing momentum after the initial rollout. Energy is high during the pilot. Six months later, the show-and-tells stop and adoption plateaus. Build sustainment in from the start: monthly show-and-tells, quarterly champion check-ins, annual policy refreshes.

6. Talk to Your Board

Boards care about fiduciary duty, reputation, and member trust. Frame AI work as risk management, not a tech project. Use these four touchpoints.

Touchpoint 0: Strategic alignment. Before any pilot work begins, the CEO confirms with the board chair which strategic priorities AI work will serve. Not a vote. Not approval. Alignment. Document the answer in a short email summary.

Touchpoint 1: Pre-pilot briefing. Ten minutes at a board meeting. Cover four points: why we're doing this now, what staff are and aren't allowed to do during the pilot, what we're protecting (member data, certification materials, intellectual capital), and when the board will see the policy.

Touchpoint 2: AI policy review. This is where the board has real input. Board approval is required for use of association data or member content to train AI models, vendor access to member knowledge assets, and licensing intellectual capital to AI applications. The board should weigh in on risk tolerance, disclosure standards, and reserved decisions. The board should not weigh in on which day-to-day tools staff use.

Touchpoint 3: Post-pilot update. Brief informational report after the 90-day rollout. Cover adoption metrics, risks surfaced and how they were addressed, what's next, and any decisions coming back to the board.

Touchpoint 4: Ongoing reserved decisions. The board sees AI again only when a member-facing assistant is proposed, association IP or member data is proposed for AI training, a material policy revision is needed, or an incident occurs. Otherwise, AI becomes a quarterly paragraph in the CEO's report.

What's Next

This quick-start toolkit gets you through your first 90 days. The full toolkit covers this content in more detail as well as what comes after: building progressively more sophisticated custom assistants, telling members when you've used AI, handling the moment a vendor adds AI to a tool you already use, budgeting realistically for year one and year two, and the appendices for the AI Governance Lead.

Get the full toolkit, updates, and additional resources at www.cathylada.com/insights.

Custom Training & Consulting



Need help adapting or implementing this for your association? Book time with Cathy Lada for a [free 30-minute consultation](#).

About Lada Consulting LLC

Lada Consulting is a boutique association consulting practice headquartered in Alexandria, VA. **Dr. Catherine Lada, D.Sc., CAE, AAiP** is an executive leader who helps organizations transform subject-matter expertise into scalable learning and content systems that support career growth, workforce development, and industry advancement. Her work integrates curriculum and instructional design for adult learners, audience insight, and emerging technologies to expand the reach and impact of professional learning. Dr. Lada is a Certified Association Executive, and an award-winning certified Association AI Professional. You can reach her at cathy@cathylada.com. Learn more at www.cathylada.com/insights.

About this Document

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