Prompt Guide for Board Members

Prepared by

Mashhood Ahmed
www.PMAssistant.ai
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About Author

Mashhood Ahmed started his research into AI and Project Management in 2017. Since then, he has spoken around the world, from New Zealand to Singapore, Africa to North America, at various conferences and global events.

In 2024, Mashhood was recognized as a PMI Top Influencer for AI 2024, The Digital Project Manager Top Influencer 2024 and a NimbleWorks Top Influencer 2025.

Since 2023, he has spoken at over 60 events, sharing his research, knowledge, and expertise with over 60,000 project managers around the globe. He is a sought-after keynote speaker, AI Masterclass trainer, and panelist.

Mashhood has over 20 years of project and program management experience leading multi-million-dollar projects around the globe. Currently, he runs a boutique consulting firm, and he is a founding director of PMassistant.ai, where he is leading a team to design and develop a next-generation project management solution leveraging AI.

Mr. Ahmed holds a master's degree from the University of Waterloo in Business, Entrepreneurship, and Technology, along with Project Management Professional (PMP), Risk Management Professional (PMI-RMP), Certified Information System Auditor (CISA), and a Lean Six Sigma Green Belt, among other designations. Besides this, he also volunteers his time for several professional and non-profit organizations.

For information on upcoming speaking engagements, please visit www.mashhood.net. Feel free to connect and follow him on LinkedIn (https://www.linkedin.com/in/Mashhood).

Additionally, he provides an AI Masterclass for Project Managers and PMOs; check the schedule on Eventbrite (https://PMassistant.eventbrite.com) or email (mahmed@pmassistant.ai) for details.
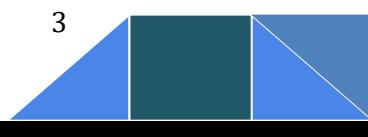
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PMAssistant.ai is the Project Manager's intelligent meeting companion, designed to transform every meeting and interaction into a strategic asset. From the moment you connect your Calendar, PMassistant.ai auto-joins your scheduled meetings, captures transcription in real-time, and distills discussions into concise summaries and action items. No more juggling manual notes across emails and spreadsheets. Our platform centralizes all meeting outputs in a project-centric dashboard, so you can instantly review decisions, deadlines, and next steps without sifting through chat logs or attachments.

What sets PMassistant.ai apart is its blend of three user-friendly capabilities. First, seamless calendar integration means you never miss a meeting or detail: our bot quietly enters, records, and exits, then loads the transcript for you. Second, our RAG-backed chatbot lets you ask natural-language questions - "What are my open action items across projects?" or "Show me risks identified in last week's kickoff" - and delivers precise answers drawn from your own meeting history and uploaded files. Third, with one click, you can push action items directly into Google Tasks, organized either under a "My Tasks" list for general meetings or a project-specific list when a meeting is linked to a project. We're soon launching integrated support for Asana and JIRA, with more to follow.

 Together, these features eliminate manual follow-ups and send every task to where you need it.

Unlike pure transcription tools that stop at text capture or heavyweight project suites that require extensive setup, PMassistant.ai sits in the sweet spot: instant meeting intelligence today. Our beta, launching in May 2025, enables project managers to reclaim 5-10 hours per week and reduce missed details by up to 90%. Over the next 6–12 months, we'll refine our AI-driven planning, risk management, and resource allocation features as we integrate with more project management tools. If you're ready to streamline your meetings, turbocharge follow-ups, and shape the future of AI in PM, join our beta and help us build the definitive assistant for every project manager.

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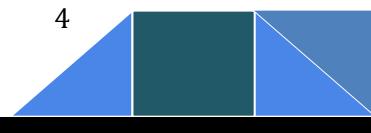
Typical Board Structure

A typical board may be comprised of the following roles:

1. President
2. Vice President
3. Secretary
4. Treasurer
5. Immediate Past President

Many boards have additional roles, including but not limited to

6. Membership
7. Academic Relations
8. Administrator
9. Advocacy
10. Certifications
11. Marketing/Communications
12. Education/Programs

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How to Use This Guide

The sample prompts provided in this guide were tested in ChatGPT, Google Gemini, and Microsoft Copilot. Each Gen AI tool provided a response that was acceptable and may require fine-tuning. Remember: the more context you provide, the better results Gen AI models will return. Also, if you do not like the first response, most Gen AI models give you an option to re-generate another response.

Each Gen AI Model provides different variations in settings and configuration. This AI Prompt Guide does **not** delve into those settings and configurations. Remember: as Gen AI is evolving, these tools will be refined over time and will get better and better.

To get the maximum benefit from these large language models, it is important to provide prompts that have good context. In this guide, prompts will ask the LLM to take on the role of an AI assistant and provide the additional context of << Role | task at hand | details | objectives >>. You can replace this with the output of any other prompts to drive additional context. The more context you provide, the better your results will be.

Since Generative AI is essentially a conversation, prompts can be broken into multiple, smaller prompts. The output from one prompt can then be used as input for the next prompt. And so on.

Use large language models as assistants, and make sure you review everything before proceeding in professional and business settings.

Ethical Considerations and Limitations of AI

AI is a tool, and users must adhere to ethical guidelines. Users must be aware of the limitations of AI, including the potential for bias, hallucinations, and lack of original thought. AI should not be used to generate content that is harmful, illegal, or deceptive. Please avoid using AI to make decisions with significant impacts on rights, well-being, or legal obligations.

Users must maintain the confidentiality of organization data and avoid uploading sensitive information into AI tools.

Disclaimer

This guide is intended as a starting point and should be customized to fit the specific needs of each board.

The prompts and suggestions here should be reviewed and adapted to align with board and organizational policies, local laws, and the risk tolerance of the specific organization.

AI Prompt Guide for Board Members

Customize these prompts to explore various aspects of your role in your board to effectively plan, monitor, and deliver value to your organization. This will help save time for board members.

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Board Chair

The Board Chair is responsible and accountable for the overall leadership and governance of the board. The Board Chair guides the board in fulfilling the organization's mission, providing strategic leadership, fostering stakeholder engagement, and ensuring effective governance and operational oversight. The Board Chair may delegate some of the operational activities to other leaders in the organization.

These prompts were drafted to request AI assistance using Generative AI tools for specific duties associated with the role of Chair.

1. Planning Board Activities

I am leading the local << Organization Name >> Chapter as the Board Chair. Can you help me as an AI assistant to plan board activities for the next << n months >>? Our objectives are << Objective 1, Objective 2 | to provide value >> to our members.

Sample Prompt I am leading the Association for Supply Chain Management (ASCM) Board as the Board Chair. Can you help me as an AI assistant to plan board activities for the next 6 months? Our objectives are to provide value to members through education, professional networking, certification support, and industry engagement.

2. Draft Board Meeting Agenda

I am leading the local << Organization Name >> Chapter as the Board Chair. Can you help me as an AI assistant to << Draft >> a board meeting agenda with << Objective 1, Objective 2 | key discussion topics | strategic priorities >>?

Sample Prompt I am leading the local Association for Talent Development (ATD) Chapter as the Board Chair. Can you, as an AI assistant, help me to draft a board meeting agenda with the following objectives: to finalize our next quarter's membership engagement plan, review the proposed budget changes for events, and discuss upcoming outreach initiatives?

3. Analyze Board Meeting

I am leading the local << Organization Name >> Chapter as the Board Chair. Can you help me as an AI assistant to << Analyze >> a board meeting? I will enter the meeting transcription next << Enter meeting transcription here >>.

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Sample Prompt   I am leading the local International Institute of Business Analysis (IIBA) Chapter as the Board Chair. Can you help me as an AI assistant to analyze our most recent board meeting? I'll provide you with the meeting transcription next, please identify key takeaways and recommended follow-up actions.

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4.   Draft Success Criteria

I am leading the local << Organization Name >> Chapter as the Board Chair. Can you help me as an AI assistant to draft Success Criteria based on << key objectives | strategic goals | member engagement metrics >>?

Sample Prompt   I am leading the local Association for Talent Development (ATD) Chapter as the Board Chair. Can you help me as an AI assistant to draft Success Criteria based on our goals of increasing certification enrollments, expanding local partnerships, and improving membership retention?

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5.   Develop Strategic & Operational Plan for the Chapter

I am leading the local << Organization Name >> Chapter as the Board Chair. Can you help me as an AI assistant to develop a strategic and operational plan based on << strategic goals | governance priorities | chapter growth objectives >>?

> **Sample Prompt**   I am leading the local American Business Women's Association (ABWA) Board as the Board Chair. Can you help me as an AI assistant to develop a strategic and operational plan based on our chapter goals increasing engagement among industry professionals and strengthening corporate partnerships?

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6.   Manage Communication Among Stakeholders, Board, and Shareholders

I am leading the local << Organization Name >> Chapter as the Board Chair. Can you help me as an AI assistant to << manage communication among stakeholders, the board, and shareholders based on communication objectives | transparency goals | key topics >>?

Sample Prompt   I am leading the local Association for Supply Chain Management (ASCM) Chapter as the Board Chair. Can you help me as an AI assistant to develop a structured communication plan for the chapter, ensuring transparency between the board, members, and shareholders?

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7.   Develop Outreach Plan

I am leading the local << Organization Name >> Chapter as the Board Chair. Can you help me as an AI assistant to develop an outreach plan to engage << target group | academic institutions | professionals | government agencies >>?

Sample Prompt   I am leading the local Institute of Electrical and Electronics Engineers (IEEE) Chapter as the Board Chair. Can you help me as an AI assistant to develop an

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outreach plan targeting local universities and professionals to promote certifications and industry networking?

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8. Delegate Authority During Absence

I am leading the << Organization Name >> Board as the Board Chair, and I won't be available for << next n weeks >> due to << personal reason | travel | conference participation >>. Can you help me as an AI assistant to draft a communication to delegate authority to << board member | director >> for << specific areas >>?

Sample Prompt   I am leading the local International Institute of Business Analysis (IIBA) Chapter as the Board Chair. I won't be available for the next 2 weeks since I will be attending an industry conference. Can you help me as an AI assistant to draft a communication to delegate authority to the Vice President of Marketing for all ongoing chapter events?

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9. Plan Annual Chapter Audit

I am leading the << Organization Name >> Board as the Board Chair. Can you help me as an AI assistant to plan the annual chapter audit with the objective of << financial audit | policy compliance | operational efficiency >>?

> **Sample Prompt**   I am leading the local Society of Actuaries (SOA) Chapter as the Board Chair. Can you help me as an AI assistant to plan the annual chapter audit to ensure transparency in chapter funds and compliance with regulations?

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10. Create a New Director/Lead Position

I am leading the << Organization Name >> Board as the Board Chair. Can you help me as an AI assistant to create a new director/lead position for << area >> with the objective to << Objective 1, Objective 2 | value proposition >>? Further, provide justification for the new role.

Sample Prompt   I am leading the local Society for Human Resource Management (SHRM) Chapter as the Board Chair. Can you help me as an AI assistant to create a new Director of Finance position with the objective of developing policies and enforcing oversight? Additionally, provide justification for the role.

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11. Create Social Media Post for a New Position

I am leading the << Organization Name >> Board as the Board Chair. Can you help me as an AI assistant to create a social media post for the << position >> with << details >>?

Sample Prompt   I am leading the local Institute of Management Accountants (IMA) Chapter as the Board Chair. Can you help me as an AI assistant to create a social media post for a new 'Director of Education' role? We are seeking an experienced

professional to lead our training programs, mentor members, and drive initiatives within the board.

Vice Chair

The board's Vice-Chair serves as the co-leader of the board and acts as a primary representative of the organization to its members and the broader community. They support the Chair in guiding board activities and initiatives to foster professional and personal development among members and to ensure the long-term health and sustainability of the organization. The Vice-Chair reports directly to the Board Chair.

Check the sample prompts in the specific portfolio functions.
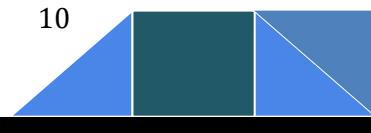
Secretary

The board secretary is often viewed by members and the wider community as the organization's official liaison. They support the board in planning and executing governance activities, help foster both professional development and personal growth among members and safeguard the board's long-term sustainability. The secretary reports to the Board Chair. The following sample prompts are crafted to help you build a reliable system for handling your board's administrative and secretarial responsibilities.

Enable Meeting Transcription

Most collaboration tools like Zoom, Microsoft Teams, Google Meet have meeting recording and transcription options. Sometimes it is disabled by your System Admin. However, once you turn on the meeting transcription, you can see the live transcription and will have the option to download the meeting transcription at the end of the meeting. There are several other apps and plug-ins that can do the same and many have additional functionality.

Preface Prompt

Use preface prompt for meeting transcriptions so it can serve as the basis of discussion with Generative AI.

I am working as a secretary for a local <<Organization Name>> Board. Help me as my AI Assistant. I will enter a meeting transcription. Use this transcription to answer my next prompts.

Typically, Gen AI (like ChatGPT) will respond with something like, "Absolutely, feel free to share the meeting transcription, and I'll be ready to assist with your subsequent prompts based on that information." This means it is ready to answer prompts. Paste the meeting transcription.

12. Meeting Summarization

I am the << Organization Name >> Board secretary. Help me as an AI Assistant to << Summarize the meeting >> under << 50 | 100 | 200 >> words, based on the << Insert Meeting Transcription >>.

13. Meeting Attendance

Based on the meeting transcription, can you help me as an AI assistant to provide the << meeting attendance >>.

14. Action Item Table

Based on the same meeting transcription, can you help me as an AI assistant to provide me with action item table with << action details, action owner and deadline >>, as discussed during the meeting.

15. Expand on Deliverables

Based on the same meeting transcription, can you help me as an AI assistant to expand on the << specific deliverables | action items >>.

16. Schedule follow up Meeting

Based on the same meeting transcription, can you help me as an AI assistant to outline << agenda >> with << following agenda items 1, 2 3 >> for the next board meeting.

Treasurer

The Chapter Treasurer is responsible for the financial stewardship, including budgeting, expense tracking, financial reporting, and ensuring compliance with board and organizational policies. The Treasurer collaborates with other board members to align financial planning with chapter goals and oversees the integrity of funds, reimbursements, and audits.

These prompts were developed to help the Treasurer use Generative AI tools for responsible financial management, planning, and reporting.

17. Develop Annual Budget and Multi-Year Financial Plan

I am currently serving as the Treasurer for the local << Organization Name >> Board. Can you as an AI assistant help me to develop the annual budget and multi-year financial plan with the objective to << ensure financial stability | align financial planning with strategic goals | provide a roadmap for future investments and expenditures >>?

> **Sample Prompt** I am currently serving as the Treasurer for the Institute of Electrical and Electronics Engineers (IEEE) Board. Can you as an AI assistant help me to develop an annual budget and a three-year financial plan that ensures financial stability and supports long-term growth?

18. Analyze Expense Tracking and Conduct Forecasting

I am currently serving as the Treasurer for the << Organization Name >> Board. Can you guide me as an AI assistant on how to analyze expense tracking and conduct expense forecasting, based on << financial data >>?

Sample Prompt   I am currently serving as the Treasurer for the Association for Talent Development (ATD) Board. Can you guide me as an AI assistant to analyze expense trends and forecast future financial needs based on past expenditures and revenue projections << insert financial data >>?

19. Develop Expense Reimbursement Process

I am currently serving as the Treasurer for the << Organization Name >> Board. Can you assist me as an AI assistant in the development of the expense reimbursement process to << ensure a transparent, timely, and fair reimbursement process >>?

Sample Prompt	I am currently serving as the Treasurer for the Society for Human Resource Management (SHRM) Board. Can you assist me as an AI assistant in the development of a structured expense reimbursement process to ensure transparency, timely approvals, and accountability for chapter-related expenses?

20. Develop Process for Claiming Reimbursements

I am currently serving as the Treasurer for the << Organization Name >> Board. I am responsible for managing funds efficiently. Can you help me as an AI assistant to develop a claim reimbursement process with the objective of << entitled funds are accurately claimed and processed >>?

21. Develop and Revise Investment Policy

I am currently serving as the Treasurer for the << Organization Name >> Board. Can you help me as an AI assistant to << develop or revise >> the investment policy to align investment activities with the chapter's strategic goals, based on << financial data >>?

Sample Prompt	I am currently serving as the Treasurer for the Educators Rising Board. Can you help me as an AI assistant to develop an investment policy that ensures financial sustainability while aligning with the financial objective of investing the funds in secure investment vehicles with no investment risk?

Past Chair

The Past Chair plays an advisory role on the chapter board, providing continuity and institutional knowledge. This role often oversees the nominations and elections process and supports leadership transitions. The Past Chair may also mentor current board members and assist with governance reviews and audit support.

These prompts are designed to help the Immediate Past President use Generative AI tools to provide mentorship, uphold governance, and support leadership continuity.

22. Setting up a Nomination Committee

I am volunteering at << Organization Name>> as an immediate past president. Can you help me as an AI Assistant to << Setup the Nomination Committee for Elections Planning >> for << these positions Position 1, Position 2, Position 3>> with the objective << to ensure a smooth transition and uphold the integrity of the election process >> that will start in the next << n months >>.

| Sample Prompt	I am volunteering at Nonprofit Leadership Alliance (NLA) Board as an immediate past president. Can you help me as an AI Assistant to Setup the Nomination Committee for Elections Planning for Membership with the objective to ensure a smooth transition and uphold the integrity of the election process that will start in the next 3 months.

23. Supporting and Mentoring in Strategic Plan Development

I am volunteering at << Organization Name>> as an immediate past president, offering mentorship is crucial for our board. Can you guide me as an AI Assistant to << Support and Mentor in Strategic Plan Development>>? My goal is to ensure the << strategic plan >> aligns with our chapter's << objectives | of providing value to members and adhering to the inputs from the different portfolio areas >>, I will enter << strategic plan >> after this prompt, analyze it and provide your recommendations.

Membership

The Membership portfolio oversees member engagement, recruitment, and retention for the organization. This includes analyzing membership metrics, designing outreach and engagement strategies, crafting seamless onboarding experiences, and responding to member needs. The role acts as a liaison between the board and its membership body, ensuring the organization's value proposition is clearly communicated and consistently upheld.

These prompts were designed to help the Membership director use Generative AI to enhance member experiences and support chapter sustainability.

24. Develop a Membership Plan

I am the membership director for the local <<Organization Name>> Board. Can you help me as an AI assistant to brainstorm ideas to increase membership for the following categories << professionals | students | recent graduates >>?

> **Sample Prompt**   I am the membership director for the local American Society of Association Executives (ASAE) Board. Can you help me as an AI assistant to brainstorm ideas to increase membership among students and recent graduates by promoting our certifications and networking opportunities? >>?

25. Develop a Membership Engagement Plan

I am leading the role of Membership leader at << Organization Name >> Board. Can you help me as an AI assistant to develop a membership engagement plan for << specific member interests >>?

Sample Prompt   I am the Membership director at the local American Business Women's Association (ABWA) Board. Can you help me as an AI assistant to develop a membership engagement plan for recent graduates by organizing mentorship programs, networking events, and certification study groups?

26. Create a Membership Survey

I am the Membership director for a local <<Organization Name>> Board. As an AI assistant can you help me to develop a membership survey with the objectives of << understanding member needs | measuring satisfaction | identifying engagement opportunities >>?

Sample Prompt   I am the Membership director at the local IEEE Board. As an AI assistant can you help me develop a 10 questions survey to understand member satisfaction with chapter activities in the last 6 months, also would like to collect future topics that may interest the chapter members.

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Sample Prompt	I am the Membership director at a local Association for Talent Development (ATD) chapter. Can you help me as an AI Assistant to develop a 5 questions survey with for post dinner event to get the feedback on dinner, venue, and speaker.

27. Analyze Membership Summary and Trends

As the Membership director, I'm tasked with monitoring our chapter's growth and health. Can you assist me as an AI Assistant in << Analyzing Membership Summary and Trends >>? I aim to provide value by understanding how our membership demographics have evolved over time, predict future changes and members expectations, I will enter << survey response | membership demographics | engagement trends >> as a << next input or upload a file >>.

28. Develop a Membership Summary Report

I am the Membership director for the local << Organization Name >> Board. Can you help me as an AI assistant to develop a membership summary report based on << membership data >>?

Sample Prompt	I am the Membership director for the Society for Human Resource Management (SHRM) Board. Can you help me as an AI assistant to develop a membership summary report based on the attached latest membership statistics, retention rates, and engagement trends?

Marketing

The Marketing Coordinator is responsible for promoting the organization's brand, events, and initiatives. This includes developing campaigns, managing digital channels, creating and curating content, and raising public awareness of the association's mission and offerings. The role works closely with membership and programs teams to enhance the board's visibility and overall impact.

These prompts support the Marketing Director in leveraging Generative AI to plan outreach campaigns, boost engagement, and create compelling marketing assets.

29. Develop Sponsorship Packages

I am currently serving in the Marketing role for the << Organization Name >> Board. Can you, as an AI assistant, help me to draft sponsorship packages for our upcoming << event type >>? The objective is to << create attractive opportunities that align with our chapter's strategic goals >>.

> **Sample Prompt** I am currently serving in the Marketing role for the Women in Manufacturing (WiM) Board. Can you, as an AI assistant, help me draft sponsorship packages for our annual summit? The objective is to create tiered sponsorship opportunities that attract design and manufacturing companies.

30. Develop Marketing Campaigns

I am currently serving in the Marketing role for the << Organization Name >> Board. Can you, as an AI assistant, help me develop << a marketing campaign to increase awareness of the brand and our chapter within our territory and to support member acquisition and retention >>.

Sample Prompt I am currently serving in the Marketing role for the Educators Rising Board. Can you, as an AI assistant, help me develop a multi-channel marketing campaign to boost local chapter awareness, drive new membership sign-ups, and promote upcoming certification workshops?

31. Brainstorm Ideas for Online Presence

I am currently serving in the Marketing role for the << Organization Name >> Board. Can you, as an AI assistant, help me brainstorm << ideas for improving our online presence, including our website and social media >>?

Sample Prompt I am currently serving in the Marketing role for the International Coaching Federation (ICF) Board. Can you, as an AI assistant, help me brainstorm ways to improve our online presence, including optimizing our website for SEO, increasing LinkedIn engagement, and using targeted social media ads?

32. Design a Community Outreach Program

I am currently serving in the Marketing role for the << Organization Name >> Board. Can you, as an AI assistant, help me design a community outreach program? The objective is << to increase brand awareness within our territory >>.

> **Sample Prompt** I am currently serving in the Marketing role for the Institute of Management Accountants (IMA) Board. Can you, as an AI assistant, help me design a community outreach program? The objective is to strengthen IMA's presence among local universities, accounting professionals, and government agencies?

33. Create an Event Promotion Strategy

I am currently serving in the Marketing role for the << Organization Name >> Board. Can you, as an AI assistant, guide me to create an event promotion strategy for << event details >> with the aim of << objectives >>?

Sample Prompt I am currently serving in the Marketing role for the Association of Fundraising Professionals (AFP) Board. Can you, as an AI assistant, help me create an event promotion strategy for our upcoming seminar on fundraising, with the aim of increasing registrations through email campaigns, LinkedIn posts, and influence partnerships?

34. Develop a Content Marketing Plan

I am currently serving in the Marketing role for the << Organization Name >> Board. Can you, as an AI assistant, support me in developing a content marketing plan that focuses on << specific objectives >>.

Sample Prompt I am currently serving in the Marketing role for the Nonprofit Leadership Alliance (NLA) Board. Can you, as an AI assistant, help me develop a content marketing plan that focuses on thought leadership through blog posts, case studies, and member success stories to position our chapter as a leading authority in nonprofit leadership?

35. Develop a Branding and Messaging Guide

I am currently serving in the Marketing role for the << Organization Name >> Board, can you as an AI assistant, help me craft a branding and messaging guide to ensure << marketing and public relations efforts >>?

Sample Prompt I am currently serving in the Marketing role for the American Society of Association Executives (ASAE) Board. Can you, as an AI assistant, help me develop a branding and messaging guide to ensure consistent communication across our website, social media, and email campaigns while aligning with ASAE's global brand?

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Education and Programs

The Education and Programs portfolio is responsible for planning and executing an organization's events, workshops, and learning activities. This includes identifying and securing qualified speakers, coordinating all logistical details, gathering participant feedback, and ensuring each program delivers tangible value to members. By managing these initiatives, the portfolio plays a vital role in engaging members and supporting their ongoing professional growth.

These prompts were created to assist the Programs portfolio leader in using Generative AI to streamline event planning, speaker management, and content delivery.

36. Plan Chapter Events

I am currently leading the Education and Programs portfolio at the << Organization Name >> Board. Can you, as an AI assistant, help me to plan << event type >> in the next << time period >>? The objective is to << list objectives >>, and in line with feedback and insights from << membership survey results, or board direction >>?

Sample Prompt   I am currently leading the Education and Programs portfolio at the American Business Women's Association (ABWA) Board. Can you, as an AI assistant, help me to plan a quarterly women's networking event? The objective is to increase member engagement, provide professional development opportunities, and align with feedback from member survey results << add survey results here >>.

37. Develop Speaker Introductions

I am currently leading the Education and Programs portfolio at the << Organization Name >> Board. Can you, as an AI assistant, help me in highlighting key points from this << speaker profile >>, to be read in << time limit >>? The speaker will speak on the topic of << topic details >>?

Sample Prompt   I am currently leading the Education and Programs portfolio at the American Society for Quality (ASQ) Board. Can you, as an AI assistant, help me in highlighting the key points from Barry Grey's speaker profile, to be read in 45 seconds? The speaker for the annual quality summit? The speaker will speak on the topic of AI, quality and evolving challenges.

38. Develop Event Surveys and Feedback

I am currently leading the Education and Programs portfolio at the << Organization Name >> Board. Can you, as an AI assistant, help me to develop << number >> survey questions on the chapter event with the objective to gather actionable insights from our members?

Sample Prompt   I am currently leading the Education and Programs portfolio at the National Institute for Certification in Engineering Technologies (NICET) Board. Can you,

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as an AI assistant, help me to develop seven survey questions on the chapter event with the objective of gathering actionable insights from our members at the exam preparation workshop?

39. Developing Program Content

I am currently leading the Education and Programs portfolio at the << Organization Name >> Board. Can you, as an AI assistant, help me to develop engaging and educational content for our chapter programs for the next << time period >>? The goal is to curate content that caters to the diverse interests of our members based on << chapter's strategic objectives >> and << membership feedback >>?

Sample Prompt   I am currently leading the Education and Programs portfolio at the Association for Supply Chain Management (ASCM) Board. Can you, as an AI assistant, help me to curate content that caters to the diverse interests of our members based on increasing membership numbers and bringing networking to ASCM?

40. Build a Speaker Database

I am currently leading the Education and Programs portfolio at the << Organization Name >> Board. Can you, as an AI assistant, help me to brainstorm ideas for building a diverse speaker database, including outreach to << local industry leaders | certified professionals | academic experts >>?

> **Sample Prompt**   I am currently leading the Education and Programs portfolio at the Toastmasters International Board. Can you, as an AI assistant, help me to brainstorm ideas for building a diverse speaker database, including outreach to local industry leaders, certified professionals, academic experts?

41. Create a Social Media Post for Call for Speakers

I am currently leading the Education and Programs portfolio at the << Organization Name >> Board. Can you, as an AI assistant, help me to create a call for speakers post, targeting << local | professional >> speakers for our << monthly | quarterly >> events? The theme of the program is << theme >>.

Sample Prompt   I am currently leading the Education and Programs portfolio at the International Institute of Business Analysis (IIBA) Board. Can you, as an AI assistant, help me to create a LinkedIn post calling for speakers, targeting local speakers for our upcoming quarterly events? The theme of the program is evolving business analysis best practices.

Professional Development

The Professional Development Lead oversees the planning of conferences, training sessions and leadership development opportunities for the board. This role involves monitoring industry trends, coordinating with speakers, managing budgets and ensuring that all content supports the organization's professional growth goals.

These prompts enable the Professional Development leader to use Generative AI tools for conference planning, speaker engagement, and learning strategy.

42. Plan the Annual Conference

I am currently volunteering as a Professional Development leader for the << Organization Name >> Board. Can you, as an AI assistant, help me to plan the annual conference on << theme >>, and the objectives are to << list objectives >>.

> **Sample Prompt**
> I am currently volunteering as a Professional Development leader for the Casualty Actuarial Society (CAS) Board. Can you, as an AI assistant, help me to plan the annual conference on Actuarial Sciences, the objectives are to enhance member education, provide networking opportunities, and highlight the latest trends

43. Develop Conference Budget

I am currently volunteering as a Professional Development leader for the << Organization Name >> Board. Can you, as an AI assistant, help me to develop a conference budget? The board has approved << dollar amount >>, and last year's conference expenses were << financial data >>.

Sample Prompt I am currently volunteering as a Professional Development leader for the Association for Talent Development (ATD) Board. Can you, as an AI assistant, help me to develop a budget for our annual conference? The board has approved $25,000, and last year's conference expenses totaled $21,000, covering venue, speakers, and catering.

44. Draft Speaker Agreements

I am currently volunteering as a Professional Development leader for the << Organization Name >> Board. Can you, as an AI assistant, help me to draft speaker agreements? The goals are to << goals for speaker agreements >>.

Sample Prompt I am currently volunteering as a Professional Development role for the Society for Human Resource Management (SHRM) Board. Can you, as an AI assistant, help me draft speaker agreements? The goals are to ensure clear expectations, intellectual property rights, and honorariums for our keynote speakers?

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45. Develop Conference Marketing Strategy and Plan

I am currently volunteering as a Professional Development leader for the << Organization Name >> Board. Can you, as an AI assistant, help me in developing a conference marketing strategy and plan? The objective is to << maximize attendance | ensure the conference runs smoothly | increase engagement among professionals >>.

Sample Prompt   I am currently volunteering as a Professional Development leader for the Women in Manufacturing (WiM) Board. Can you, as an AI assistant, help me to develop a conference marketing strategy? The objective is to increase attendance through targeted email campaigns, LinkedIn promotions, and partnerships with manufacturing firms.
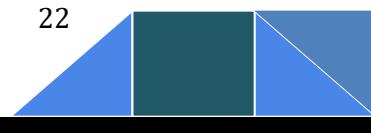
Certifications

The Certification Coordinator oversees the promotion and support of the organization's professional credentialing programs. This role involves organizing study groups, providing and curating exam preparation resources, engaging with existing credential holders, and working to improve overall exam readiness among members.

These prompts assist the Certifications Director in using Generative AI to create effective learning environments and certification engagement strategies.

46. Develop a Certification Preparation Program

I am currently serving in the Certifications role for the << Organization Name >> Board. As an AI assistant can you help me to develop a certification preparation program with the objective to << support members pursuing <<Organization Name>> certifications | enhance exam readiness | increase certification pass rates >>?

> **Sample Prompt**   I am leading the Certifications role for the International Institute of Business Analysis (IIBA) Board. As an AI assistant, can you help me to develop a certification preparation program with the objective to support members pursuing IIBA certifications by offering structured study sessions, practice exams, and expert-led

47. Plan Study Groups

I am currently serving in the Certifications role for the << Organization Name >> Board. As an AI assistant can you help me to develop a study group plan with the objectives to << list objectives >> for members pursuing << specific certifications >>?

Sample Prompt   I am leading the Certifications role for the Society of Actuaries (SOA) Board. As an AI assistant, can you help me to develop a study group plan for members preparing for certification exams, focusing on peer collaboration, scheduled mock exams, and expert mentorship?

48. Plan Member Engagements

I am the Certifications Director for the << Organization Name >> Board. As an AI assistant can you help me to plan certified member engagements with the goal to << add value to our chapter through mentorship | facilitate discussion | provide training preparation through our educational programs >>?

Sample Prompt   I am leading the Certifications role for the Casualty Actuarial Society (CAS) Board. As an AI assistant, can you help me to plan member engagement

initiatives, such as mentorship programs and discussion forums, to enhance networking and knowledge-sharing among certified professionals?

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49. Develop Study Group Engagement Activities

I am leading the Certifications role for the << Organization Name >> Board. As an AI assistant can you help me to develop study group engagement activities based on the learning objectives of << certifications >>?

Sample Prompt   I am leading the Certifications role for the Society for Human Resource Management (SHRM) Board. As an AI assistant, can you help me to create study group engagement activities based on the learning objectives of the SHRM certification?

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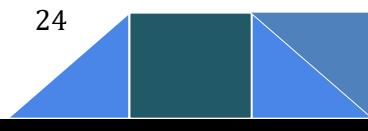
Advocacy and Government Relations

The Advocacy and Government Relations Lead builds and maintains relationships with policymakers, monitors legislative developments, and advocates for policies that advance the mission of the organization and the wider professional community. This role ensures that the board's advocacy activities remain non-partisan and aligned with the association's global objectives.

50. Identify Local Advocacy Partnerships

I am serving as the Advocacy and Government Relations Lead for the << Organization Name >> Board. As an AI assistant help me to identify << local government bodies or non-profit organizations >> in << jurisdiction >> that align with our shared goals in << goals >> I'd also like support drafting an outreach message to << chapter goals >>?

Sample Prompt   I am serving as the Advocacy and Government Relations Lead for the Association for Talent Development (ATD) Board. Can you, as an AI assistant, help me identify government agencies or tech coalitions in Alberta that align with our shared goals in funding and digital literacy? I'd also like support in drafting an outreach message to initiate collaboration.

51. Develop Government and Regulatory Advocacy Program

I am serving as the Advocacy and Government Relations Lead for the << Organization Name >> Board. As an AI assistant help me to develop a government and regulatory advocacy program to support << topics >>? Our goal is to inform decision-makers about << specific issues >>. Could you help me formulate a strategic plan to engage with policymakers and position << Organization Name >> as a key thought leader in shaping << industry >> standards?

Sample Prompt   I am serving as the Advocacy and Government Relations Lead for the Society for Human Resource Management (SHRM) Board. Can you, as an AI assistant, help me develop a government and regulatory advocacy program to support youth talent development initiatives? Our goal is to inform decision-makers about AI's impact and digital literacy. Could you help me formulate a strategic plan to engage with policymakers and position SHRM as a thought leader in shaping training standards?

52. Monitor Public Policy Trends

I am serving as the Advocacy and Government Relations Lead for the << Organization Name >> Board. As an AI assistant help me to identify emerging public policy or regulatory trends in << jurisdiction >> impacting << relevant areas >> within our jurisdiction?

Sample Prompt	I am serving as the Advocacy and Government Relations Lead for the Women in Manufacturing (WiM) Board. Can you, as an AI assistant, help me identify emerging public policy trends and legislation in Alberta that could impact diversity, hiring and manufacturing practices?

53. Facilitate Member Engagement in Advocacy

I am serving as the Advocacy and Government Relations Lead for the << Organization Name >> Board. As an AI assistant help me to design an event or forum to engage chapter members in << discussions about local policy issues | regulatory updates | public sector opportunities >>?

Sample Prompt	I am serving as the Advocacy and Government Relations Lead for the Educators Rising Board. Can you, as an AI assistant, help me design a virtual roundtable to engage chapter members in a discussion on recent regulation updates in Alberta and their implications for local teachers and educators?

54. Encourage Member Thought Leadership in Policy

I am serving as the Advocacy and Government Relations Lead for the << Organization Name >> Board. As an AI assistant help me to draft a call for volunteers to << contribute to public consultations or co-author policy white papers on this topic>>?

Sample Prompt	I am serving as the Advocacy and Government Relations Lead for the Institute of Management Accountants (IMA) Board. Can you, as an AI assistant, help me draft a call for volunteers to co-author a policy white paper on AI and existing accounting frameworks?

55. Identify Local Advocacy Partnerships

I am serving as the Advocacy and Government Relations Lead for the << Organization Name >> Board. As an AI assistant help me to identify << local government bodies or non-profit organizations >> in << jurisdiction >> that align with our shared goals in << actuary certification | empowerment >> I'd also like support drafting an outreach message to << chapter goals >>?

Sample Prompt	I am serving as the Advocacy and Government Relations Lead for the International Association of Black Actuaries (IABA) Board. Can you, as an AI assistant, help me identify government agencies or coalitions in Alberta that align with our shared goals in actuarial sciences and community empowerment? I'd also like support drafting an outreach message to initiate collaboration.

Conclusion

Artificial intelligence is now a core board capability rather than a passing trend. Learning prompt engineering is as important today as learning email was in the 1990s. Well-structured prompts let board leaders move beyond routine reports and minutes, allowing them to focus on strategy, oversight, and stakeholder impact.

This guide has shown how role-specific prompts, built around context, task, format, and tone, can deliver targeted insights across finance, governance, membership, events, and advocacy. Techniques such as few-shot examples, chain-of-thought reasoning, and iterative refinement keep AI outputs sharp and relevant. Responsible practices, including privacy checks, bias reviews, and human validation, protect organisational trust and compliance.

Mastering AI dialogue is an ongoing journey. Boards that begin now will make smarter decisions sooner and increase member value.

To continue your exploration and connect with the community, follow PMAssistant.ai and Mashhood Ahmed on LinkedIn.

Finally, a note of gratitude. Thank you for taking the time to delve into this essential aspect of the future of board governance. For any questions or further engagement, please feel free to contact Mashhood Ahmed at mahmed@pmassistant.ai.

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