RICOCHET
ASSOCIATION TRANSFORMATION

CSRA | NATIONAL RESTAURANT ASSOCIATION
Annual Meeting 2026
November 16–20, 2026 | Nashville, Tennessee

TOGETHER We Win

CSRA I National Restaurant Association's 2026 Annual Meeting

From Busy Work to Better Work

Using AI to Increase Your Association's Capacity

Chris Gloede, CAE · Chief Consultant, Ricochet

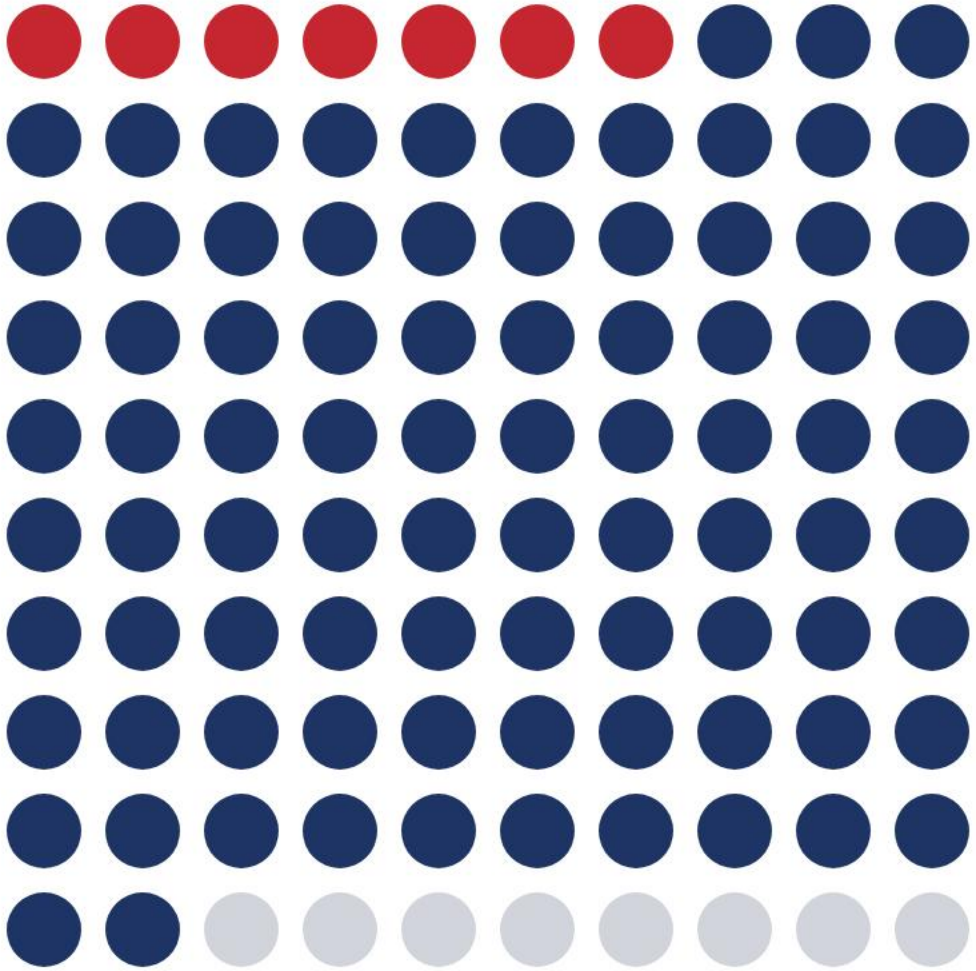
BEFORE WE START

92%

of nonprofits now **use** AI

7%

say it has produced a **major** improvement



Source · Virtuous, 2026

We all bought tractors. Almost nobody built the farm.

Today is about building a farm of agents to tend your association's work every day.





INTRODUCTIONS

Chris Gloede, CAE

Chief Consultant, Ricochet

Chris was the first-ever Chief Marketing Officer of the American Bar Association, where he grew membership to its largest in 137 years.

Today he helps associations build modern membership strategies, technology stacks and AI agents. He teaches association executives at the Association Academy.

Before associations: Ogilvy and Leo Burnett, for BP, Chrysler, Kraft and Unilever.

INTRODUCTIONS

About Ricochet and the Association Academy

RICOCHET
ASSOCIATION TRANSFORMATION

A strategic consultancy for associations. Nearly all Ricochet staff worked inside associations before joining, so our recommendations fit how associations really run.



Member Research



Membership Modeling



Brand and Campaign Studio



Tech and AI Roadmaps



Fractional Staffing and Training

Association Academy
by RICOCHET

Live online certificate courses that teach practical skills and earn CAE credit. Your free seat in the AI Accelerator is at the end of today's session.



AI Accelerator



Conference Architecture



Membership Growth



Newsletter Success



Search Engine Optimization

Source · ricochetadvice.com/services and /academy

Today’s discussion

Why now

Teams got smaller. AI got bigger, but it never grew past the chat window.

Agents just arrived

Personal agents are in our pockets. Professional agents are next.

Build your agent farm

What a farm is, what it costs, and your first step in 2027.

Why now

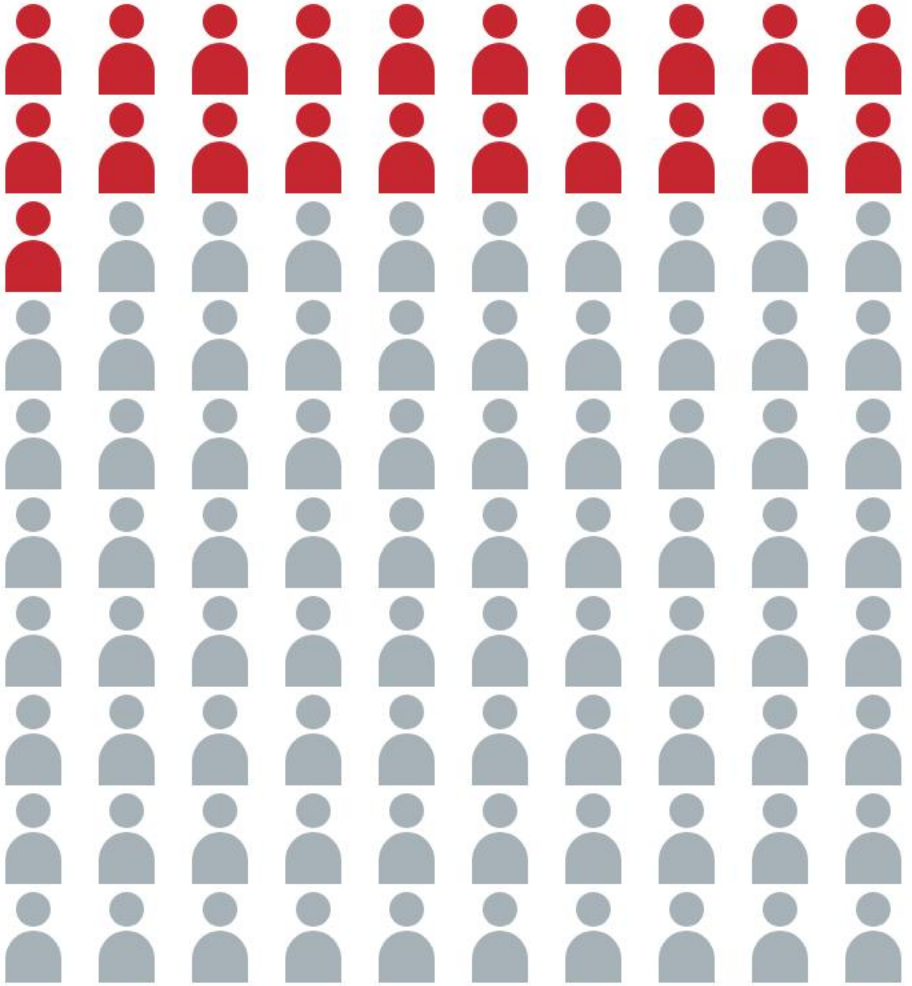
Your team got smaller. Your AI never grew past the chat window.



WHY NOW

21%

of associations cut staff last year. When they did, **directors and managers** took the biggest hit.



Source · ASAE, 2026

WHY NOW

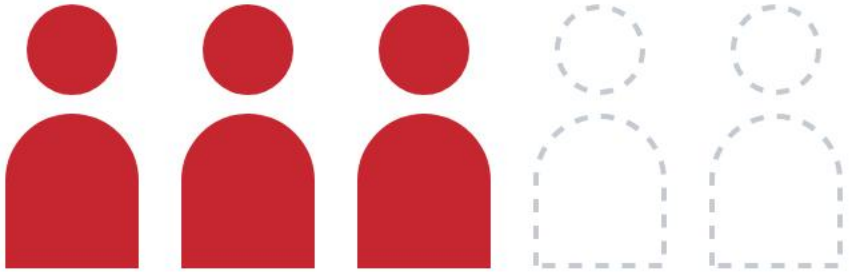
Limited staff, expanded responsibility

THEN



A membership director and four staff

NOW

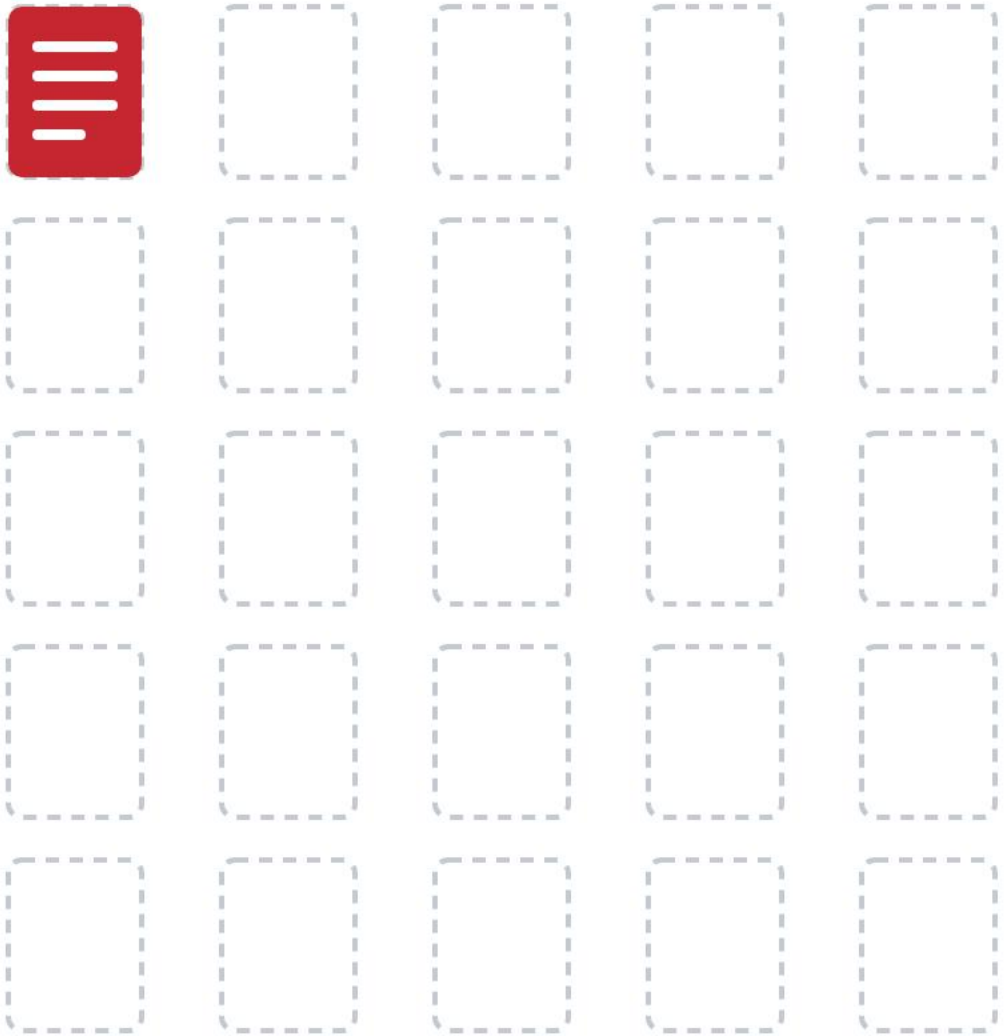


Three people carrying the work of five, with the same member expectations

WHY NOW

4%

of nonprofits have documented, repeatable AI workflows. That is **1 in 25**. Everyone else is improvising.

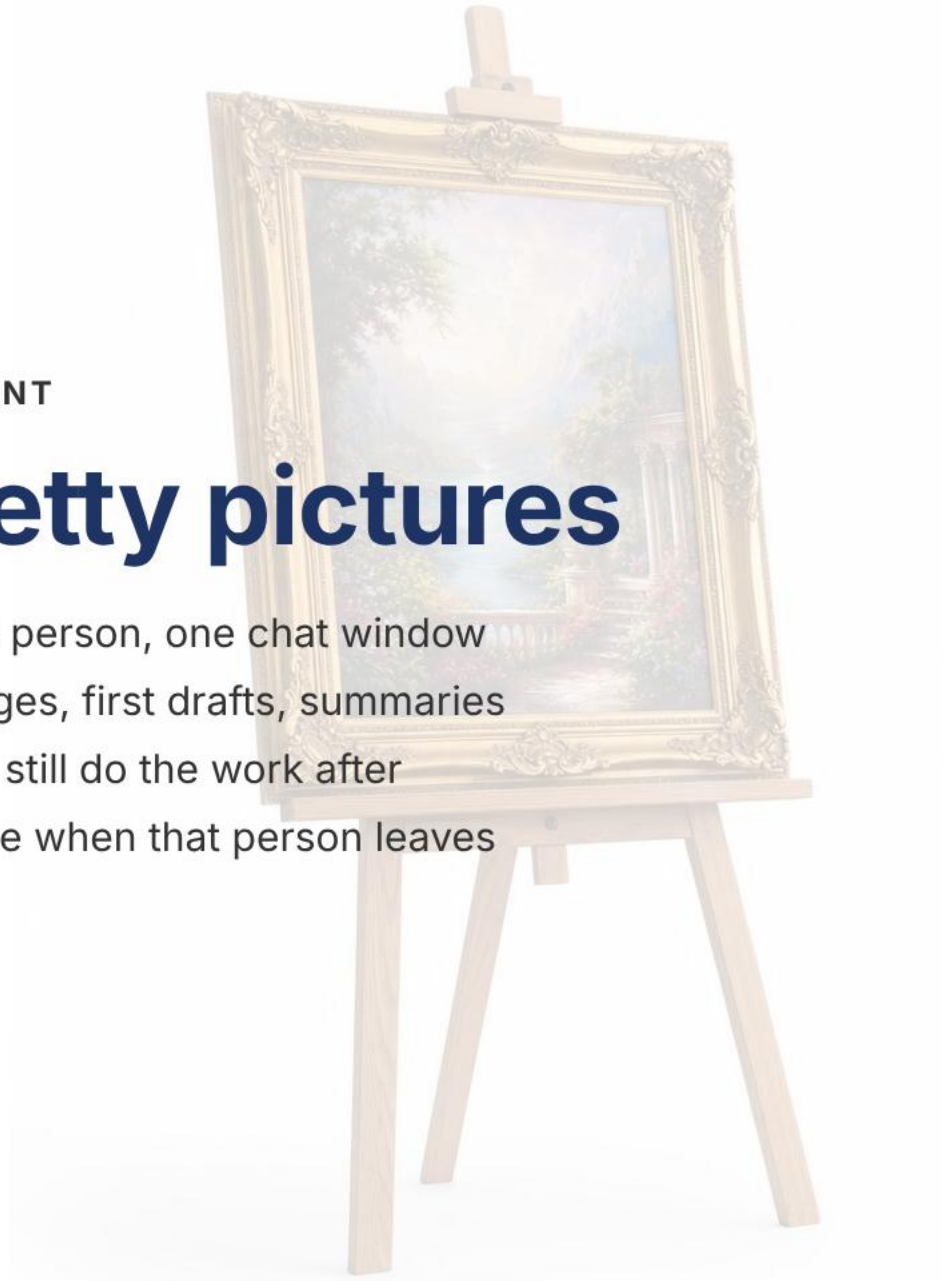


Source · Virtuous, 2026

CURRENT

Pretty pictures

- One person, one chat window
- Images, first drafts, summaries
- You still do the work after
- Gone when that person leaves



FUTURE

Agent farms

- Many agents, each with one job
- Written instructions and a schedule
- Connected to your real systems
- A person approves at every gate

Agents just arrived

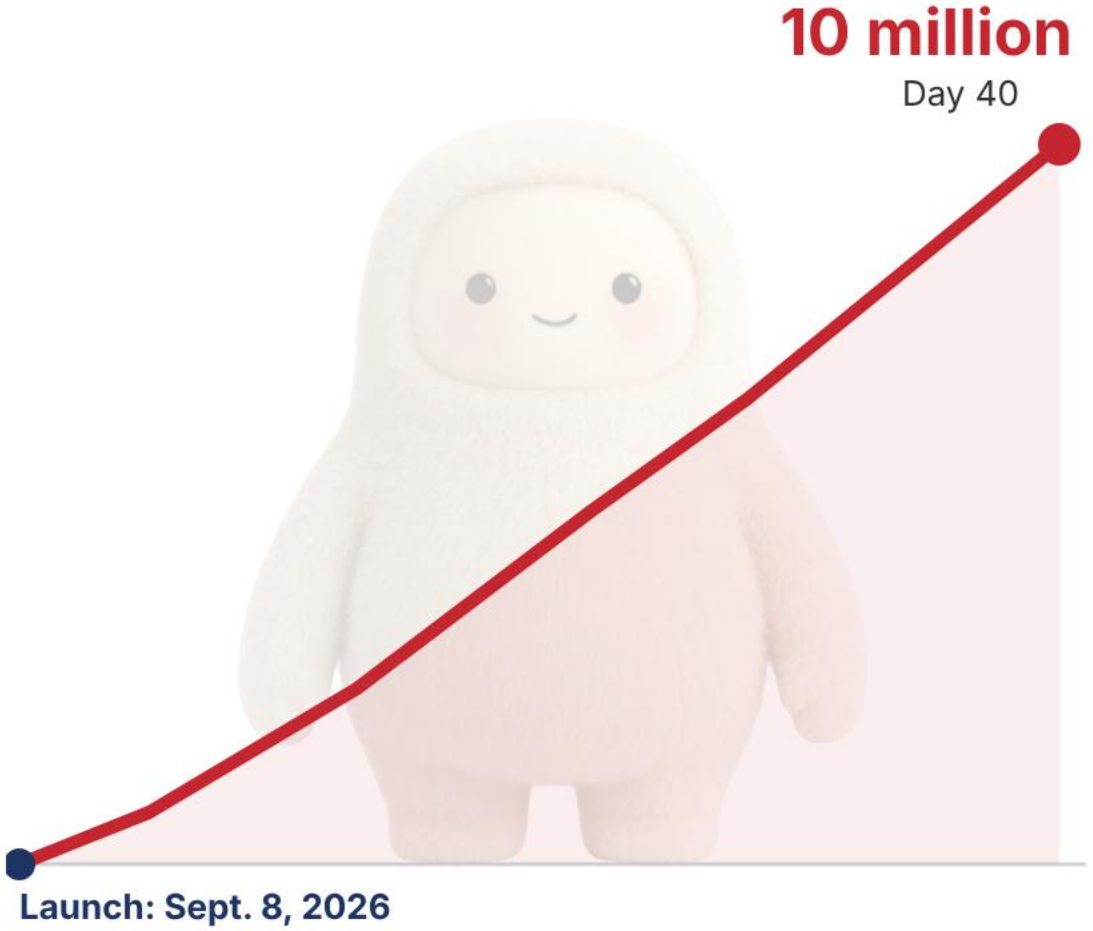
Personal agents showed up in our pockets. Professional agents are next.



PERSONAL AGENTS

10M

U.S. downloads of Meta's Muse personal agent in its first **40 days**. No app had grown that fast since Threads.



Source · Sensor Tower, Oct. 2026

PERSONAL AGENTS

Muse personal agent on a keychain

Meta’s Muse Charm is expected in **December 2026**. It is a small device built just for talking to your Muse agent.

- About the size of an earbuds case, on a wrist strap
- Its own 5G connection, so no phone needed
- A small touchscreen and a microphone
- Price not yet announced



Source · Gulf News, 2026

PERSONAL AGENTS

What is a personal agent?

AI that does the task, not just the talking. It uses your apps for you and checks in before anything important happens.



Acts for you

Books, buys, fills out forms and sends messages



Lives among apps

Email, SMS, calendar, WhatsApp, Instagram and the web



Keeps working

Runs in the background after you close the app



Asks first

Checks with you before money moves or a message goes out

PERSONAL AGENTS

What people ask Muse to do



Book dinner

Finds a table, books it and adds it to your calendar



Shop a recipe

Turns a recipe Reel you saved into a grocery list



Plan a trip

Finds flights and hotels that fit your budget and calendar



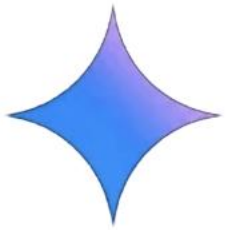
Buy the thing

Compares standing desks under $400 and checks out for you

Source · Meta; Tom’s Guide; KDnuggets, 2026

Personal agents

4 launched in 5 months. Scan to try one.



GOOGLE · MAY 19

Gemini Spark

A 24/7 agent for your inbox, calendar and docs



XAI · AUG. 11

Grok Bot

Works across your apps on its own cloud computer



META · SEPT. 8

Meta Muse

Books, shops and plans across Meta's apps and the web



OPENAI · SEPT. 29

ChatGPT Dots

Always-on agents that work in the background of ChatGPT

Source · Engadget; TechCrunch; Tom's Guide, 2026

YOU TELL ME

What would you hand to your personal agent?

- Weekly groceries
- Kids’ schedules
- Lowering a bill
- Trip planning



FROM PERSONAL TO PROFESSIONAL

On Saturday, a personal agent orders the pizza.



FROM PERSONAL TO PROFESSIONAL

On Saturday, a personal agent orders the pizza.

On Monday, your staff will want a professional agent that looks up a member's email in the AMS.



PROFESSIONAL AGENTS

Professional agents

MICROSOFT

Copilot Autopilot

Works across Microsoft 365 under its own identity

Announced Sept. 25, 2026

GOOGLE

Gemini agent

Acts across business apps and logs every step

Announced Oct. 8, 2026

ANTHROPIC

Claude Duet

Built for professional work; asks before it sends

Announced Oct. 21, 2026

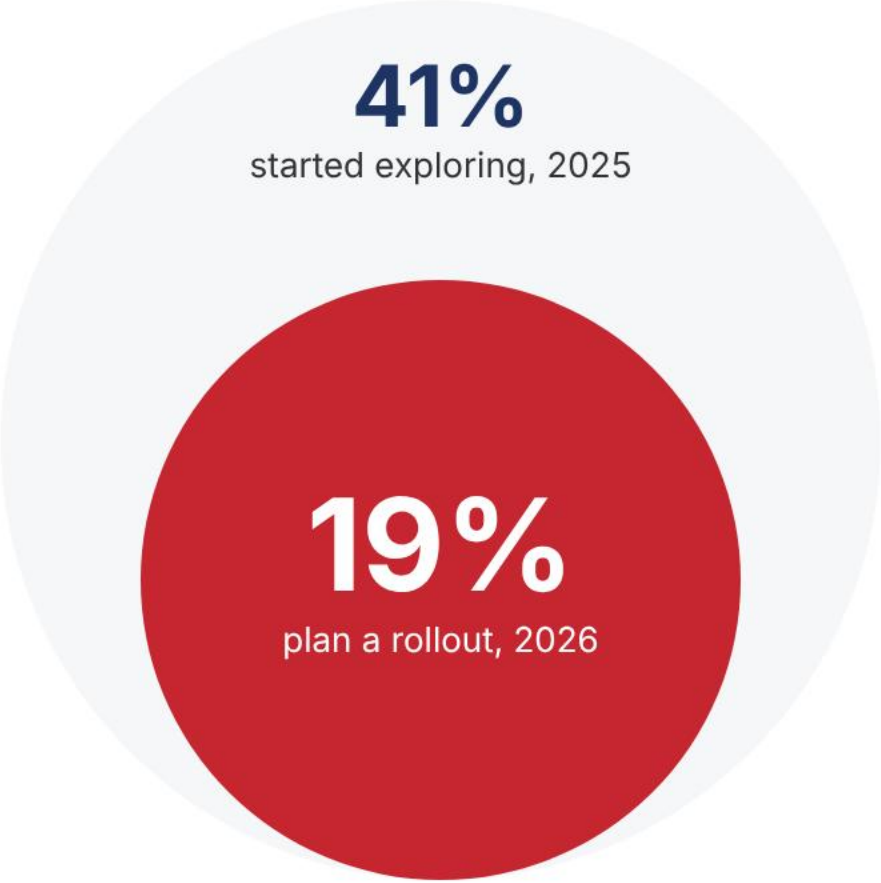
Membership Assistant
Momentive · Aug. 4, 2026

AI Assistant
Higher Logic · Aug. 11, 2026

PROFESSIONAL AGENTS

Most associations are moving slowly

41% started exploring AI in 2025, but only **19%** plan to roll something out in 2026.

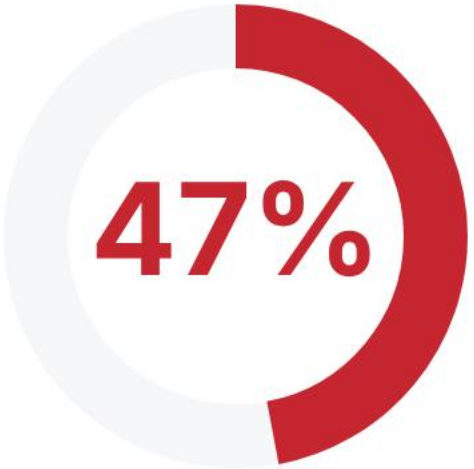


Source · Sequence Consulting, 2026

PROFESSIONAL AGENTS

The rules haven't caught up

Half of nonprofits have no AI policy. Half of staff use AI outside the guidance that does exist.



of nonprofits have **no AI policy**



of staff use AI **outside official guidance**

Source · Virtuous; Nonprofit Quarterly, 2026

PROFESSIONAL AGENTS

Is this task a good agent?

Run any task through five filters. Four or five yeses make a strong first agent.



Repetitive

Happens every week, the same way



Time-heavy

Eats an hour or more each time



Rule-based

Low judgment: you could write the steps down



Cross-system

Copies between the AMS, email and website



Checkable

A person can review it before it reaches a member

YOU TELL ME

What professional agent would you set up first?

- Renewal reminders
- Event questions
- Sponsor follow-up
- Board minutes



Build your agent farm

Agents that tend the crops a small staff never has time for.



BEFORE YOU BUILD

Free vs. paid: where your data goes

Free and personal plans

- Your chats can be used to train the model
- Each person must opt out in settings
- No admin view of who uses what
- Fine for public information only

Paid business plans

- No training on your data by default
- Admin controls, single sign-on and audit logs
- One place to set rules for the whole staff
- The plan your agents should run on

On any plan, never paste: member records, payment details, passwords or anything under NDA.

Source · OpenAI plan terms, 2026

BEFORE YOU BUILD

Three things always running in the background



Expense

Agents run on tokens. Usage can rack up fast, so set spending caps and check the bill monthly.



Environment

Every run uses data center power and water. Keep the agents that earn their keep; turn off the rest.



Employment

Displacement is real. Use agents to carry the work a lean team can't, not to replace the people you have.

BUILD YOUR AGENT FARM

What is an agent farm?

A set of agents your association builds and owns. Each one tends a single task, on a schedule.



One job each

Member service, webinars, the newsletter



Written rules

Your steps and your voice, written down once



On a schedule

Overnight, weekly or the moment a class ends



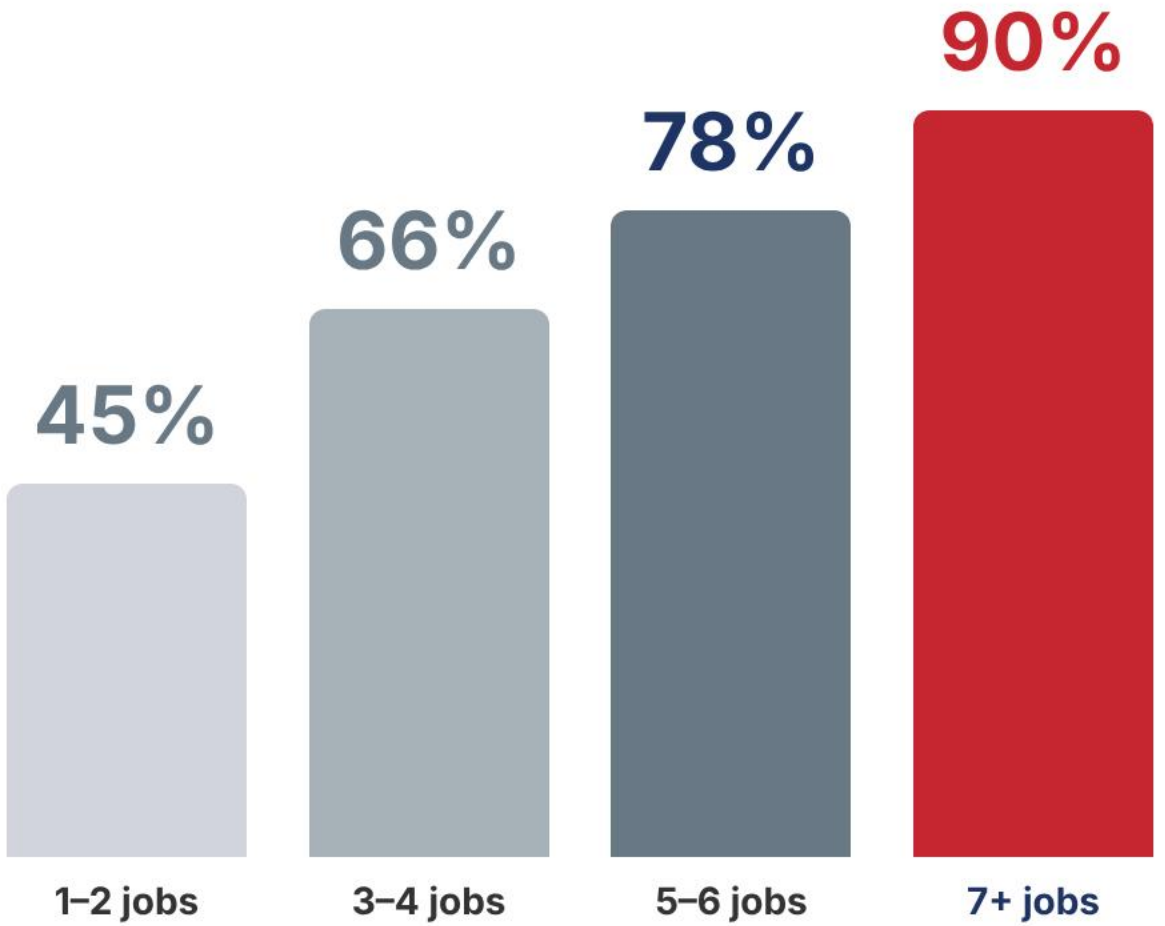
A person at the gate

Staff approve before it reaches a member

BUILD YOUR AGENT FARM

More crops, more yield

Share of workers who see better productivity, by how many jobs AI does for them.



Source · Gallup, 2026

BUILD YOUR AGENT FARM

Your work world is more complicated than your personal one

Personal

- One person giving the orders
- A phone and a few apps
- Your own data, your own rules
- A wrong pizza costs $20

Professional

- A team serving thousands of members
- An AMS plus a dozen other systems
- Member data with rules on who sees what
- A wrong email reaches members and money

BUILD YOUR AGENT FARM

Your association’s data lives in many places



Many systems

AMS, email, events, website and payments. One member task touches them all.



Connections

Secure links that let an agent read and write each system you choose.



Human in the loop

Staff approve before anything reaches a member or moves money.

Ricochet is a small shop, just like many of you



5 employees, many hats each

4 time zones

3 continents

BUILD YOUR AGENT FARM

Inside Ricochet’s agent farm



29

agents, from sales to finance to Academy classes



11

run on a schedule, mostly overnight



18

run on request, the same way every time

OUR MATH

The whole farm costs less than the next hire

$10,000

a year in AI usage for all 29 agents

$70,000+

a year for the next staff hire

BUILD YOUR AGENT FARM

Ricochet’s agents, by department

Operations

Customer service · Ticketing · Finance · Month-end close · Weekly reports

Sales

Pipeline review · Proposals · Partner matching · Outbound · Competitor watch

Deliverables

Membership audits · Benefit summaries · Member surveys · Renewal and win-back analysis

Academy

Post-class follow-up · Course launch · Certificates

Web and email

Newsletters · AI search and accessibility checks

Social

LinkedIn publishing · Ad audiences

Data

Database hygiene · CRM enrichment · Prospect discovery

Client service

AMS Connector setup · Coaching status · Subscription status

BUILD YOUR AGENT FARM

4 high-value agents for associations



Member service

Answers members in minutes, day or night



Post-webinar

Clears the follow-up the same night



Newsletter

Shows members the value of their dues



Community

Keeps member conversations going

HIGH-VALUE AGENT

Member service agent

Answers members in minutes, day or night

- Answers email, text and form questions
- Updates the member record
- Copies staff on every reply
- Hands anything unusual to a person



HIGH-VALUE AGENT

Post-webinar agent

Clears the follow-up the same night

- Records attendance and credits
- Shares slides, recording and resources
- Posts the recap and answers chat questions
- Updates the resource page and the CRM



HIGH-VALUE AGENT

Newsletter agent

Shows members the value of their dues

- Gathers news, events and member wins
- Drafts the issue in your voice
- Builds it in your email tool
- Staff edits and approves the send



HIGH-VALUE AGENT

Community agent

Keeps member conversations going

- Welcomes new members
- Flags posts nobody has answered
- Suggests seed topics to start talk
- Sends staff a morning briefing



YOUR FIRST STEP

What it takes to build an agent



Cross-department

Membership, events and finance all touch the same task. Get them in one room.



High context

The agent needs the unwritten rules your best staffer carries in their head.



Technical awareness

Someone has to understand connections, permissions and usage costs.



Data hygiene

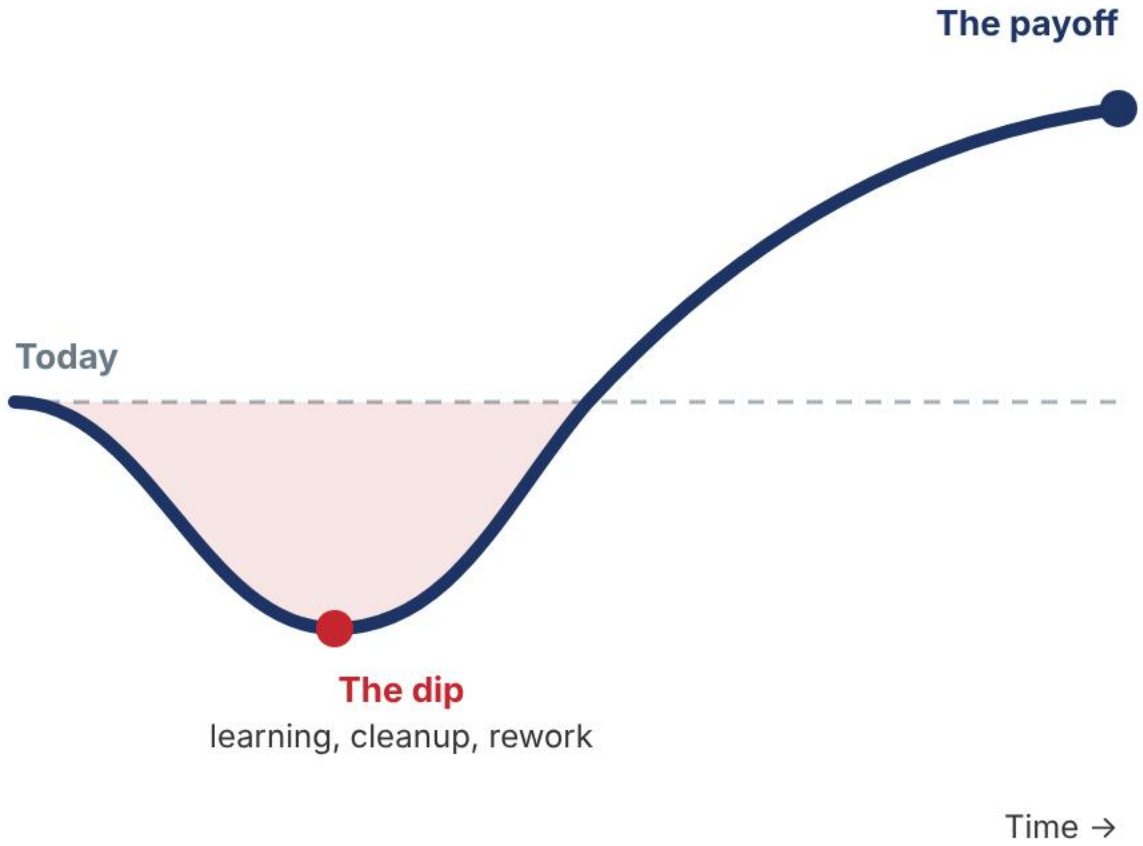
Duplicate and stale AMS records turn into wrong answers, fast.

YOUR FIRST STEP

Expect the dip

Every new way of working costs time before it saves time. Cleaning data, writing the rules and checking outputs come first.

Budget for the dip. The payoff comes after it.



Source · Brynjolfsson, Rock and Syverson, The Productivity J-Curve

YOUR FIRST STEP

Start with one agent in 2027



One task

Pick the repeat work that passes the five filters.



One checkpoint

Name the person who approves before it reaches a member.



One metric

Hours returned, reply time or renewals. Report it monthly.

Together we win. Your team now includes agents.

Association Academy by RICOCHET | higher logic SPONSOR

A GIFT FOR CSRA ATTENDEES

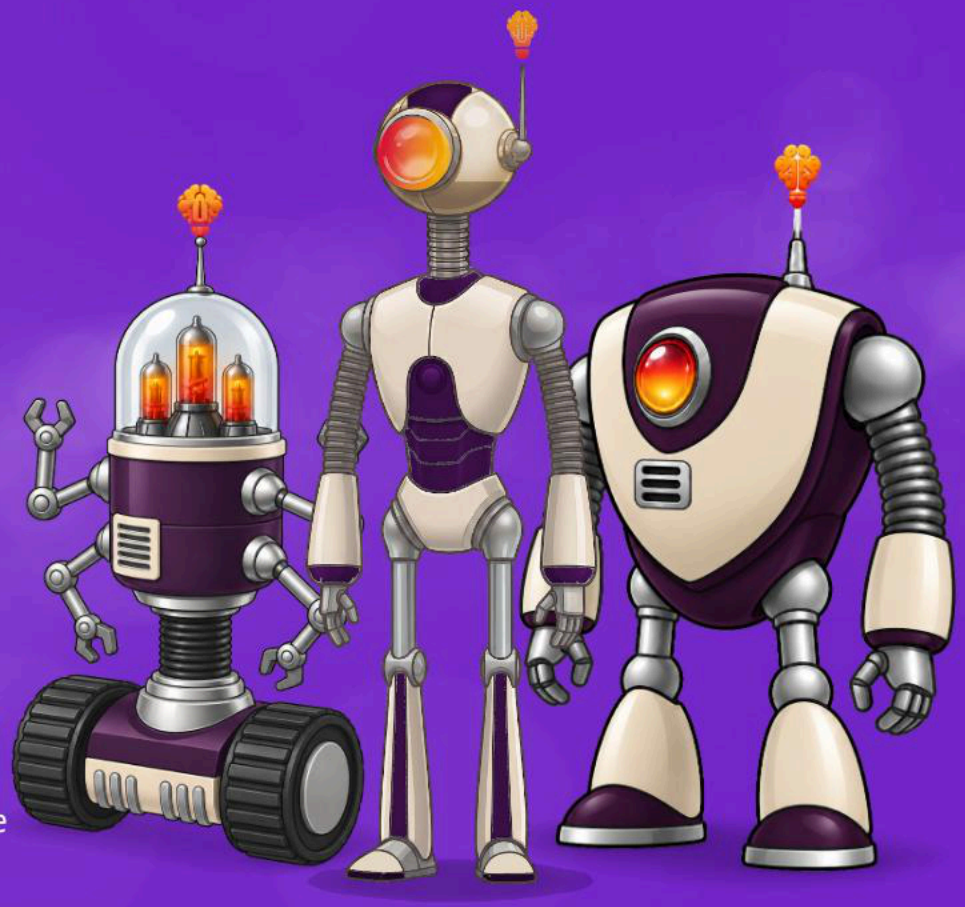
Free! Attend the next AI Accelerator course

8 live classes · 8 CAE, CMP and CEM credits

Thursdays, 1-2 p.m. ET · January 21 through March 11, 2027

Enroll with code [redacted]

ricochetadvice.com/academy/association-ai-accelerator-certificate-course



CAE · cmp · CEM Certified · Trustpilot ★★★★★

CSRA | RICOCHET ASSOCIATION TRANSFORMATION

RICOCHET SERVICES

Ways we help associations



Member Research

Member surveys analyzed by segment, with every finding tied to a recommendation.



Membership Modeling

Benchmark and forecast member types and dues to grow revenue and your roster.



Creative Studio

Clarify your value story, then produce campaigns fast from an AI-ready design system.

Mailchimp

Setup, cleanup and member journeys for associations that run on Mailchimp.



Membership Journeys

Onboarding and renewal journeys written per segment and built in your email platform.



Tech and AI Roadmaps

A five-year plan for every system, scored on value against effort and cost.



Fractional Staffing and Training

Senior association talent for part of each week, plus courses and workshops.

HubSpot

Implementation, audits and training from a HubSpot Solutions Partner.

Let’s keep the conversation going.

Which agent will you build first?

Chris Gloede, CAE

Chief Consultant, Ricochet

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LINKEDIN
linkedin.com/in/chrisgloede

Connect with me

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Stronger connections. Shared ideas. Greater impact.

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