



Automate the Mundane to Unleash Your Creativity

By **Joseph Burak**, AI Strategist, TRANSiT Strategy & Analytics

How many people need to be in this room for a 99% chance that two of you share the same birthday?

The Birthday Paradox

57

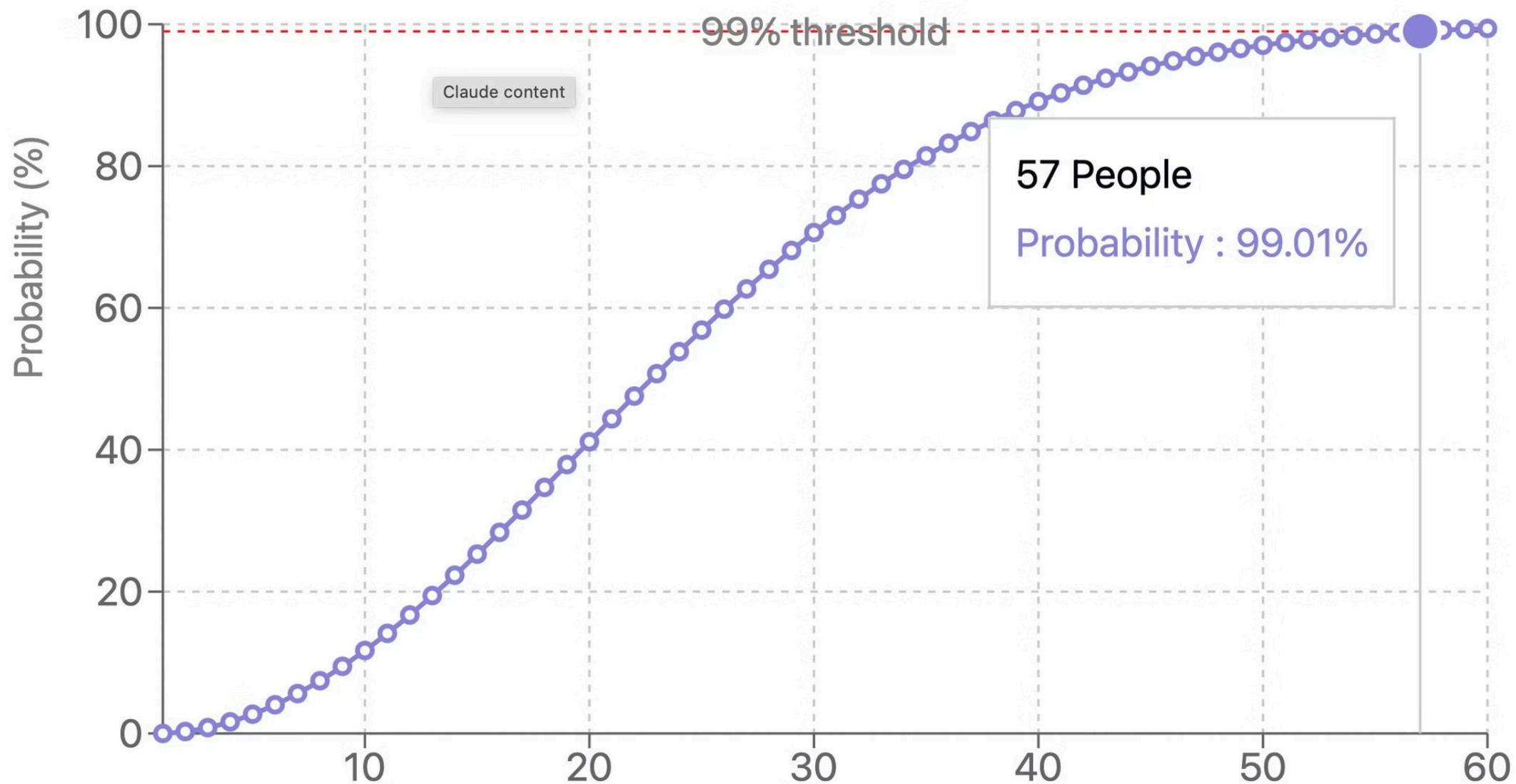
People Needed for 99%
Chance of a Shared Birthday

1596

Possible Pairs

First person can pair with 57 others,
second with 56, etc.





Our Program for Today



Identify Processes that *Could* be Automated

Recognize high-value, low-risk tasks



Understand AI/Automation Tools

Explore different options available for your team



Automation in Action

Learn from successful automation implementations



Create Your AI Action Plan

Leave with concrete next steps

AI's Impact on Workers

30%

Workers Impacted

Over 30% of U.S. workers will see their work affected by AI.

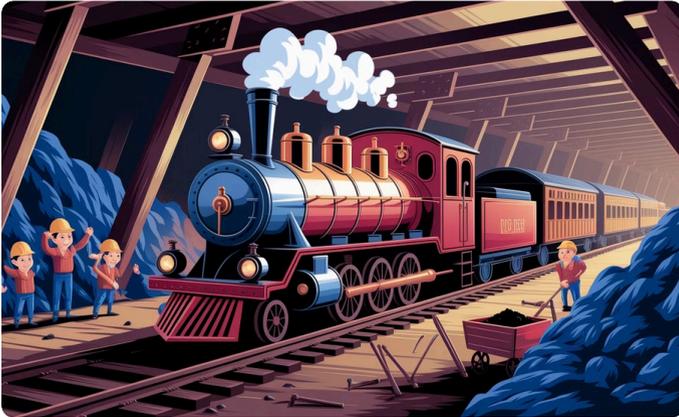
50%

Work Tasks Transformed

Up to half of tasks across most industries will be changed.

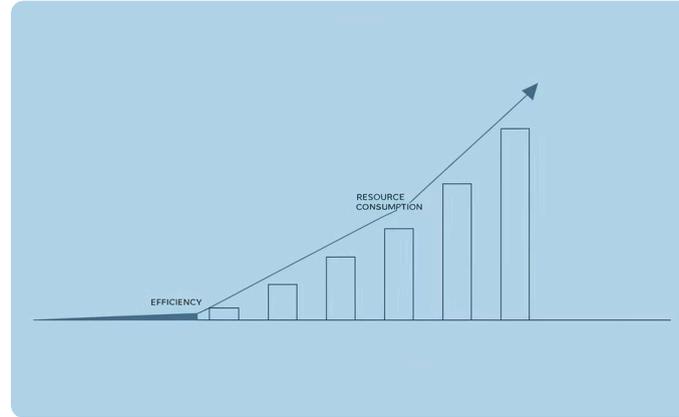


Jevon's Paradox



Historical Origins

William Jevons observed that coal consumption increased despite improved efficiency in steam engines. Greater efficiency made coal more economical.



The Paradox Illustrated

As technology becomes more efficient, we don't use less of a resource. Instead, increased efficiency drives higher total consumption.



AI Adoption Today

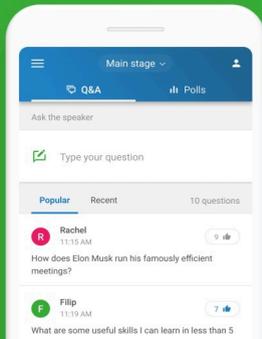
As AI tools make us more productive, we're not working less. We're taking on new and more complex tasks and expanding our work scope.

Every role is a series of projects. And every project is a series of tasks.

If AI could handle 40% of your work tasks, which would you automate first (up to three)?

Join the conversation
**Ask questions &
vote in live polls**

slido



 app.sli.do



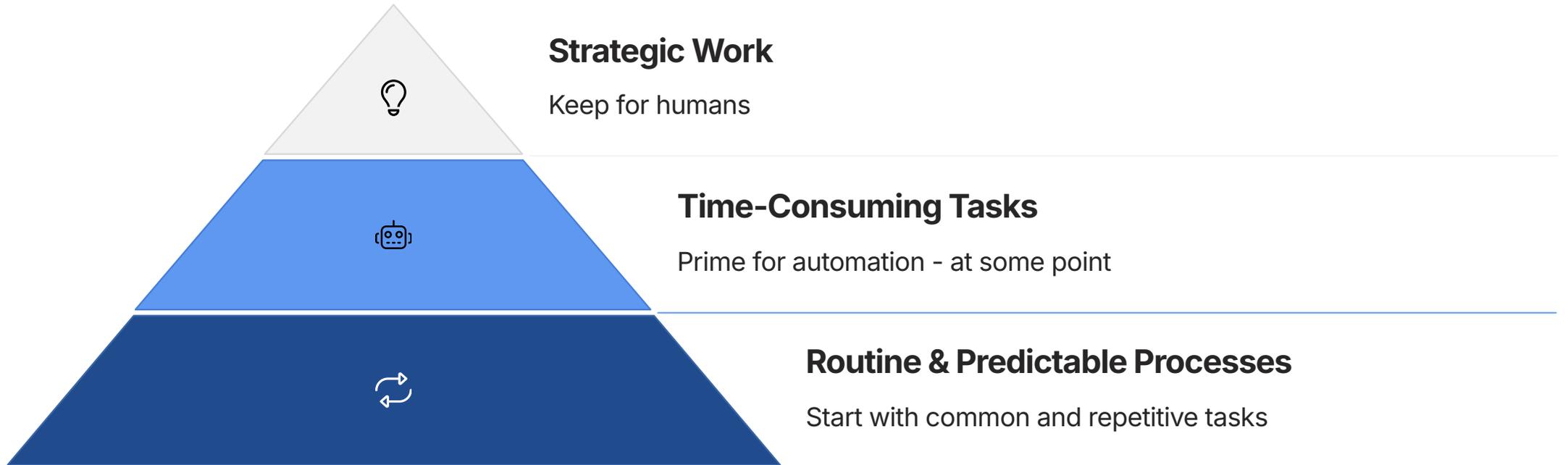
Join Slido: Enter #code to vote and ask questions

Participate in a live poll, quiz or Q&A. No login required.

AI Needs People



What Can Be Automated?





What Should I Automate First?



Frequency

Does this task happen often or in large amounts?



Rule-based

Can this be done following clear, repeatable steps?



Error-prone

Is this frequently done incorrectly when done by hand?



Time-consuming (and Low-value)

Does this take extra time but not require critical thinking?



Automation Tools in Action

Email Management

AI determines your most read emails and files them accordingly, reducing inbox clutter.

Expense Reports

Upload receipts and let AI extract information, organize it, and calculate totals.

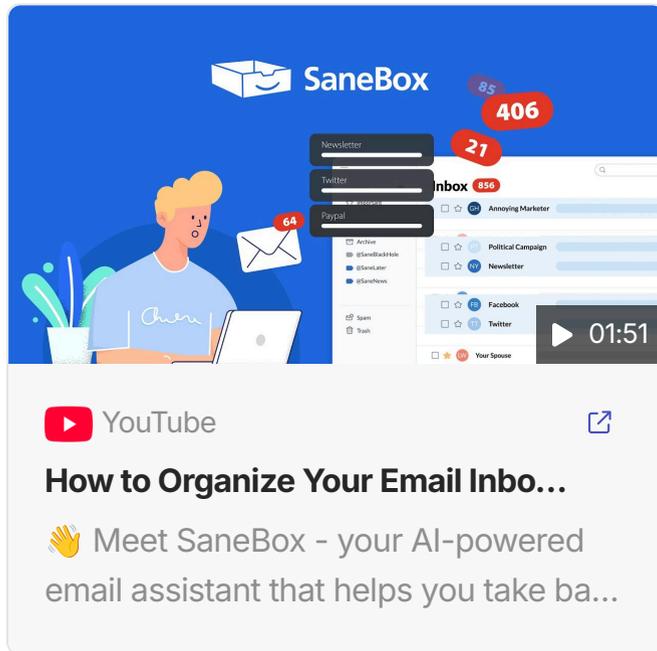
Content Consistency

Create custom GPTs that match your association's voice for consistent member-facing content.

Process Automation

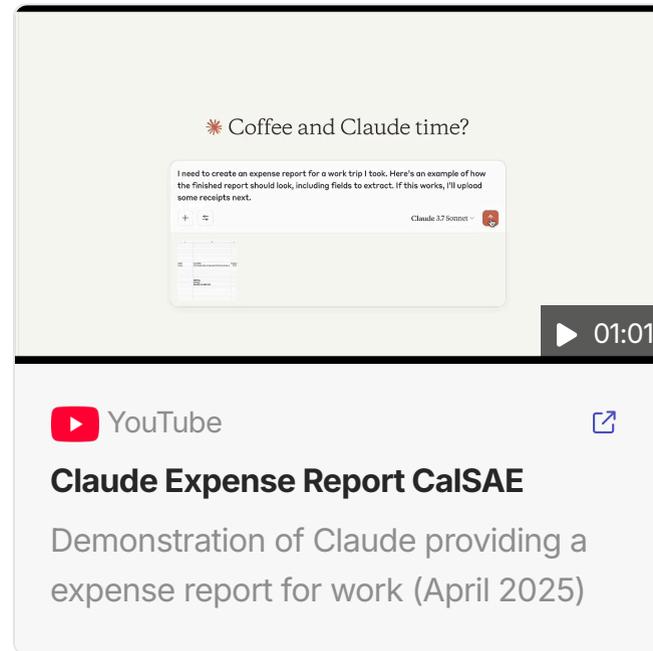
Use Zapier to automate membership onboarding, event management, and CE tracking.

Automation Tools



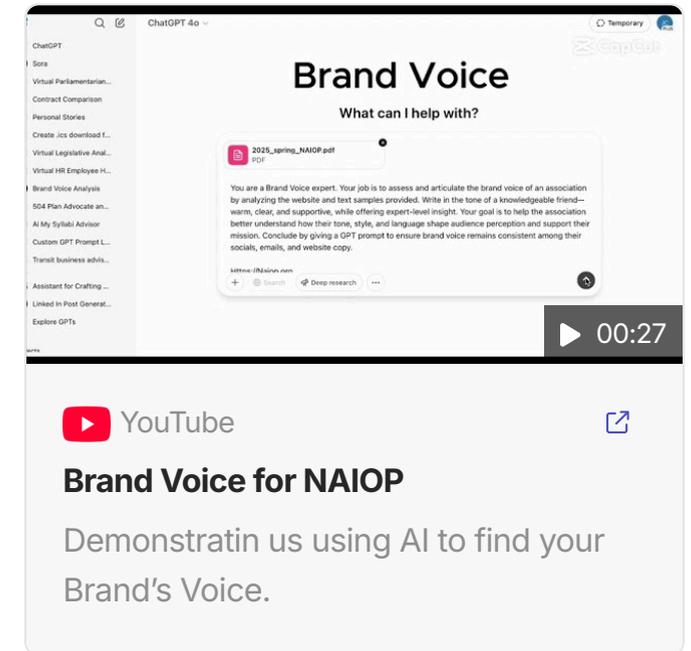
Email Management (SaneBox)

SaneBox uses AI to understand your email inbox. Then filters away unimportant messages so your attention stays on what matters.



Expense Reports (Claude)

Expense reports become effortless. Just drop in your receipts—Claude extracts the details and generates a clean report with minimal tweaks.

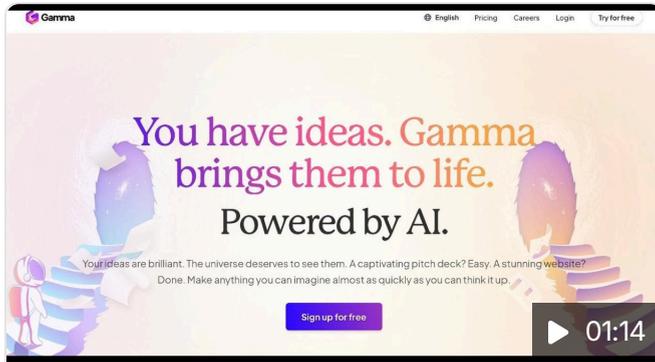


Voice of the Association/ Content (ChatGPT)

Use ChatGPT to analyze and replicate your association's style and tone across emails, social posts, web copy, etc.

Then build a custom GPT to automate your responses.

Automation Tools (continued)



You have ideas. Gamma brings them to life.
Powered by AI.

Your ideas are brilliant. The universe deserves to see them. A captivating pitch deck? Easy. A stunning website? Done. Make anything you can imagine almost as quickly as you can think it up.

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01:14

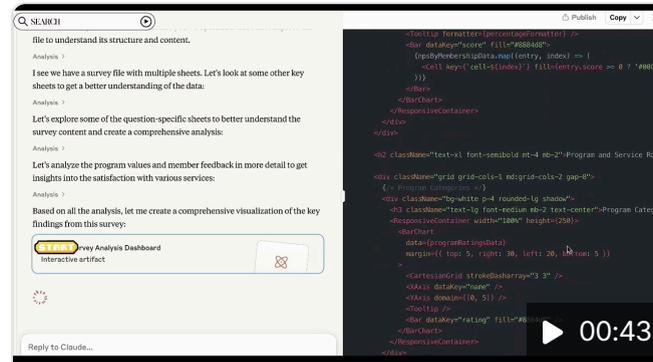
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Gamma Overview CalSAE

Demonstration of Gamma.app for CalSAE

Quick Slide decks (Gamma.app)

Let your slide decks become instant narratives. Turn outlines, notes, or a few prompts into polished presentations—no design skills needed. Bonus AI features to customize images and content.



file to understand its structure and content.

Analysis ?
I see we have a survey file with multiple sheets. Let's look at some other key sheets to get a better understanding of the data:

Analysis ?
Let's explore some of the question-specific sheets to better understand the survey content and create a comprehensive analysis:

Analysis ?
Let's analyze the program values and member feedback in more detail to get insights into the satisfaction with various services:

Analysis ?
Based on all the analysis, let me create a comprehensive visualization of the key findings from this survey:

[Survey Analysis Dashboard](#)
Interactive artifact

```
<html>
  <head>
    <title> Survey Analysis Dashboard </title>
  </head>
  <body>
    <div class="container">
      <div class="row">
        <div class="col-md-12">
          <h2> Survey Analysis Dashboard </h2>
          <table border="1">
            <thead>
              <tr>
                <th> Question ID </th>
                <th> Question Text </th>
                <th> Response Count </th>
                <th> Average Score </th>
            </thead>
            <tbody>
              <tr>
                <td> Q1 </td>
                <td> How satisfied are you with our services? </td>
                <td> 150 </td>
                <td> 4.5 </td>
            </tr>
            <tr>
                <td> Q2 </td>
                <td> How likely are you to recommend us to a friend? </td>
                <td> 120 </td>
                <td> 3.8 </td>
            </tr>
            <tr>
                <td> Q3 </td>
                <td> What are the most important factors in your decision to join? </td>
                <td> 180 </td>
                <td> 4.2 </td>
            </tr>
            <tr>
                <td> Q4 </td>
                <td> How do you feel about our pricing? </td>
                <td> 90 </td>
                <td> 3.5 </td>
            </tr>
            <tr>
                <td> Q5 </td>
                <td> How do you feel about our customer support? </td>
                <td> 110 </td>
                <td> 4.0 </td>
            </tr>
            <tr>
                <td> Q6 </td>
                <td> How do you feel about our website? </td>
                <td> 130 </td>
                <td> 3.9 </td>
            </tr>
            <tr>
                <td> Q7 </td>
                <td> How do you feel about our mobile app? </td>
                <td> 80 </td>
                <td> 3.7 </td>
            </tr>
            <tr>
                <td> Q8 </td>
                <td> How do you feel about our social media presence? </td>
                <td> 100 </td>
                <td> 4.1 </td>
            </tr>
            <tr>
                <td> Q9 </td>
                <td> How do you feel about our community events? </td>
                <td> 70 </td>
                <td> 4.3 </td>
            </tr>
            <tr>
                <td> Q10 </td>
                <td> How do you feel about our overall experience? </td>
                <td> 140 </td>
                <td> 4.4 </td>
            </tr>
          </tbody>
        </table>
        <div class="col-md-12">
          <h3> Key Takeaways </h3>
          <ul>
            <li> High satisfaction with services (4.5/5) </li>
            <li> Strong recommendation score (3.8/5) </li>
            <li> Pricing is a key factor in decision-making (3.5/5) </li>
            <li> Customer support is well-regarded (4.0/5) </li>
            <li> Website and mobile app need improvement (3.9/5 and 3.7/5) </li>
            <li> Social media and community events are popular (4.1/5 and 4.3/5) </li>
            <li> Overall experience is positive (4.4/5) </li>
          </ul>
        </div>
      </div>
    </div>
  </body>
</html>
```

00:43

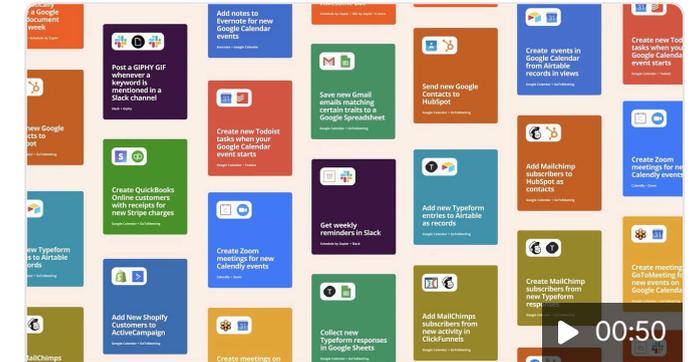
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Claude Data Analysis CalSAE

Using Claude to showcase it's data analysis capabilities.

Survey Analysis & Dashboard (Claude.ai)

Survey results become strategic insights. Claude transforms raw membership data into clear themes, key takeaways, and interactive dashboards.



Welcome to Zapier!

Try Zapier free: <https://zpr.io/RsLJK>

We're just some humans who think...

00:50

YouTube [Share](#)

Welcome to Zapier!

Try Zapier free: <https://zpr.io/RsLJK>

We're just some humans who think...

Process Automation (Zapier.com)

Manual tasks become seamless workflows. Zapier connects your apps and automates the busywork behind the scenes—no code required.

Zapier Use Case (Overview)

Web Form on TransitWithAi.com

AI Readiness and Maturity Evaluation

Evaluate your organization's readiness to integrate AI into its policy and operations.

Step 2 of 5

Has your organization reassessed its strategic/business plan to include AI considerations and adjusted accordingly?

Yes

Have you identified specific use cases for AI within your organization?

Yes

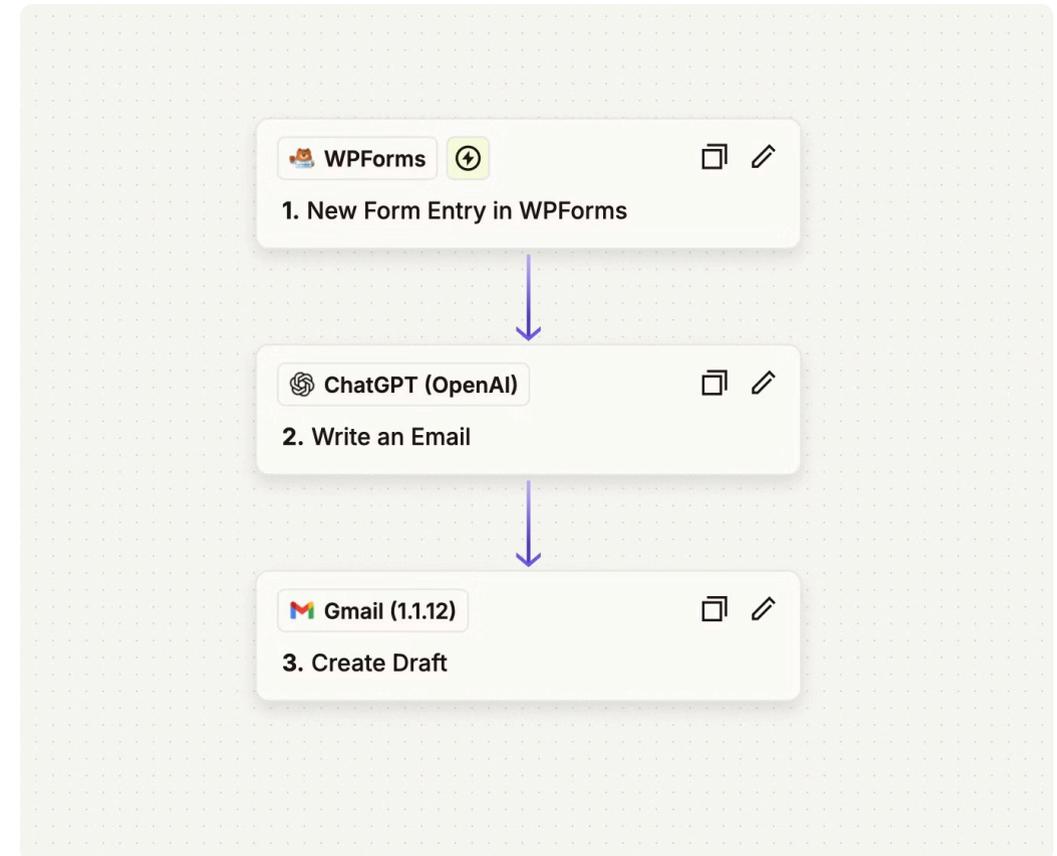
Do you cultivate an environment that encourages innovation and the use of new technologies like AI?

Yes

Have you evaluated how AI could enhance customer value?

Yes

Zapier Workflow



Zapier Use Case (Step-by-Step)

1. New Entry Form is Submitted Online

The screenshot shows the Zapier interface for configuring a new Zap. The workflow is titled "1. New Form Entry in WPForms". The left sidebar shows a vertical sequence of three steps: "1. New Form Entry in WPForms", "2. Write an Email", and "3. Create Draft". The main area shows the configuration for the first step, "Form", with the text "AI Readiness and Maturity Evaluation".

2. Answers Sent by Zapier to ChatGPT

The screenshot shows the Zapier interface for configuring the second step of the Zap, "2. Write an Email". The workflow is titled "2. Write an Email". The left sidebar shows the same three steps: "1. New Form Entry in WPForms", "2. Write an Email", and "3. Create Draft". The main area shows the configuration for the "Write an Email" step, with the following fields filled in:

- Recipient Name:** 1. Name (First): Phil
- Recipient Email:** 1. Email: pkubel@hpaonline.com
- From Name:** Joe @ TRANSIT Strategy & Analytics
- Email Prompt:** You are an amazing writing assistant tasked with drafting a warm, fun, slightly punchy, yet professional email to a client. The email will provide a brief report on the client's AI readiness based on the results of their completed assessment. First, you will analyze the assessment which had 17 questions covering 4 main areas. The client provided "yes", "no", or

Zapier Use Case (Step-by-Step)

3. ChatGPT Writes and Saves Analysis in Gmail Draft Folder

The image shows a Zapier workflow on the left and a Gmail draft editor on the right. The workflow consists of three steps: 1. New Form Entry in WPForms, 2. Write an Email using ChatGPT (OpenAI), and 3. Create Draft using Gmail (1.1.12). The Gmail draft editor shows the following details:

- To:** 1. Email: pkubel@hpaonline.com
- Subject:** Your AI Readiness Report: Insights & Next Steps!
- From:** jcoleburak@gmail.com
- From Name:** Joe @ TRANSIT
- Body type:** plain
- Body:** 2. Body: <html> <head>.../body> </html>

4. Edit and Send Draft

The image shows an email draft in Gmail with the following content:

Hey Tom,

I hope this email finds you well! Thanks for completing the AI readiness assessment. I've taken a look at your responses, and I'm excited to share some insights with you.

Strategic Alignment and Vision:
There's a budding interest in AI, but the vision and strategic alignment might need a bit more fine-tuning. A few "No" responses suggest that while there's some enthusiasm, there's still work to align AI with your core business goals. Think of it as having the pieces of a puzzle; we need to figure out how they fit together to see the full picture. For example, if your team can articulate how AI can drive your strategic objectives, you'll be in a much stronger position.

Leadership and Governance:
There's a bit of uncertainty here, which is totally normal. Leadership buy-in is crucial, especially when there's hesitation or lack of clarity on how AI fits into the broader company framework. Clarifying roles and responsibilities and perhaps some leadership training on AI could help.

Organizational Readiness:
While there's some readiness, most responses indicate that the organization might not be fully prepared for an AI transformation just yet. It's a bit like having a talented team but needing more practice and a solid game plan. Focusing on training and building a supportive infrastructure will be key here.

Risk Management and Compliance:
You've got a decent start here with some "Yes" responses, indicating an awareness of risk management and compliance. However, there's still room for improvement. Strengthening these areas will ensure that any AI initiatives are innovative and safe.

Practical Uses and Workflows

Content Creation and Editing

- Formulate ideas (ideate)
- Generate social media posts
- Generate blogs from long articles
- Proofread
- Reframe/rephrase
- Ensure brand voice consistency

Data Analysis and Visualization

- Upload datasets
- Analyze data
- Identify trends
- Provide insights
- Summarize findings
- Provide visualizations (charts and graphs)
- Create dashboards
- Engage with the data

Hypercustomization

- Analyze:
 - Preferences
 - Behaviors
 - Engagements
- Create tailored communications
- Customized content recommendations
- Personalized invitations

Personal or Role Based Assistants

- Tailored advice for tasks like:
 - Role-specific content
 - Advice and decision-making
- Deploy user-friendly staff manuals
- Assist onboarding
- Monitor legislation

Your Automation Action Plan

Audit Current Processes

Identify repetitive, time-consuming tasks across your organization.

Prioritize Opportunities

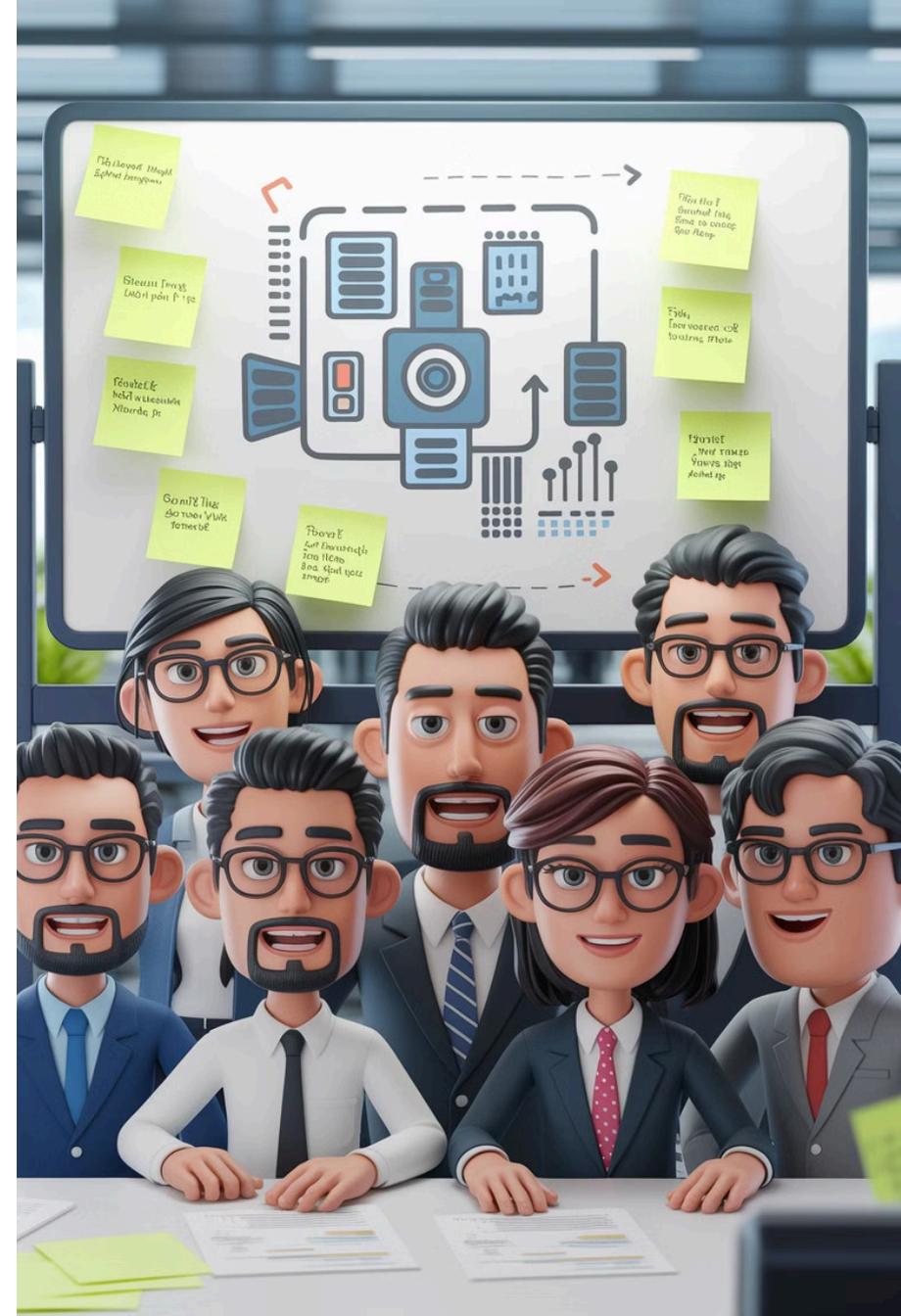
Focus on high-impact, low-complexity automation candidates first.

Start Small with Pilots

Test automation on a limited scale before full implementation.

Measure and Scale

Track results, refine your approach, and expand successful automations.

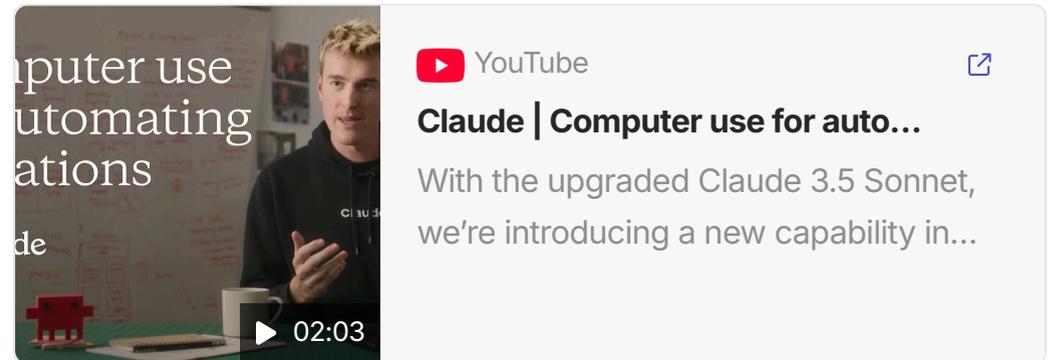


Agentic AI : The Future

Agentic AI are systems that can autonomously plan and execute tasks to achieve specific goals.

Unlike reactive AI, agentic systems **take initiative, make decisions, and learn from outcomes.**

- Operates with limited human guidance
- Navigates complex environments independently



AI Readiness Survey



AI Resources to Get Started



AI Transformation & Training

[TRANSiT Strategy & Analytics](#) provides customized team training and deployment assistance for associations (onsite and virtual).



Association-Specific Resources

Register for Sidecar's Newsletter:
<https://sidecar.ai/sidecarscoop>



Professional Development

[Sidecar.ai](#) also specializes in training association professionals. [ZapConnect](#) offers one-day immersive learning experiences. Google offers an [AI essentials course](#) for busy professionals.



Future of Jobs Report

The [World Economic Forum](#) conducts a bi-annual report on potential disruptions to the labor market.

— Lesson series

Association AI Professional Certification

Become a certified Association AI Professional (AAiP) to lead your organization into the future with confidence!

Our foundational certification program is designed to equip association professionals with both the theoretical knowledge and practical skills needed to excel in the AI-driven landscape. Earning this certification signifies your mastery of AI concepts and your ability to apply them effectively within your organization.

To achieve your AAiP certification:

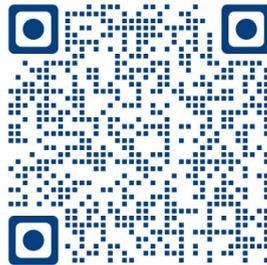
You'll complete a series of comprehensive courses and pass exams that validate your expertise. Certified professionals are recognized for their excellence in AI and are prepared to guide





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Let's Connect on LinkedIn!