

Leveraging AI to Streamline Advancement: Practical Tools for Every Track

Prompt Examples

Below are prompt examples and rules covered in the presentation presented at the Annual NAADA Conference in Knoxville, Tennessee in June 2026. Presented by Austin O'Neill, Senior Director of Development, from Montana State University Alumni Foundation.

General AI Prompt Rules

Prompt:

Include the following:

- Role
- Objective
- Context; including Tone, Audience, etc.
- Format; including categories/headers (for documents)
- Rules or Constraints
- Preferences
- Examples

Outreach Email Example

I am the key contact for Montana State University and Montana State University Alumni Foundation to the National Agricultural Alumni Development Association (NAADA). I need to write an email to my supervisor, Associate Vice President and their supervisor, Vice President, to request a budget increase to upgrade our NAADA membership to the 15+ membership because the three new hires have now been onboarded and we do not have any more membership slots in our current tier for them to participate in the professional development conference. I would like the tone to be professional, including why it is important, but keep the email relatively short.

Here is the link to the membership page <https://www.naada.org/join-naada>

Strategic Annual Travel Plan – Self-Guided Plan

Mad Libs Prompt:

Include the following:

- Role
- Objective
- Context; including Tone, Audience, etc.
- Format; including categories/headers (for documents)
- Rules or Constraints
- Preferences
- Examples

Presentation Example:

I am in a new role, Role at Role Location and need to develop a travel plan for the upcoming Fiscal Year. My travel plan needs to help me accomplish the following metrics, Objective. This will be used for Context. Please make this as a Format. In addition, I cannot Constraint/Rules. Additionally, please Preference,

Strategic Annual Travel Plan

Visits per region, Number of Meetings, Number of travel weeks, Sample Trip, Planning Notes, Travel Calendar, and Create a Report

Personal Prompt:

Role – Objective – Context – Format – Rules/Constraints – Preferences – Examples

I need your help building a strategic travel plan to accomplish my metrics for my Senior Director of Development role. The metrics directly affected by travel are the following: Personal visits – 72, Discovery Visits – 18, Solicitations Made – 24, Dollars Raised - \$2 Million. As a regional gift officer, I need to travel to the following areas; this is based on my portfolio, I think I need to visit Western Washington 4 times a year, the Portland Metro 4 times a year, Spokane and the Tri-Cities 2 times a year, and Bend, Oregon 2 times a year.

Each trip cannot be longer than 4 days (from arrival to departure) although it can be shorter, but every day should have a minimum of 3 visits per day (except travel days can have less if need) however, additional visits are encouraged if possible. Additionally, schedule travel by prioritizing ideal months to each location based on donor availability and safe travel conditions. Also, as a regional gift officer, I have to travel back to Bozeman at least once a quarter; preferable around events (Q1 – Anytime, Q2 – Homecoming, Q3 – Holiday Party, Q4 – Reunions). Further, I do not travel in to visit with donors in June, July, August, and December, and I do not want to travel more than 2 weeks per month, and I need at least two weeks of lead time to secure meetings before traveling. Additional travel constraints are that I need to have a place holder in August and March/April for the respective NAADA Fall and Spring Board Meetings, and in June for the annual conference. My personal blackout dates that I cannot travel are September 15-22.

Please include a sample trip itinerary/schedule for each location listed, important planning notes, and any other important notes I should consider when traveling there. This plan will be used by myself for planning purposes and to share with my supervisor as part of our annual planning process and needs their approval. For viewing purposes, please start the travel calendar on the start of my fiscal year, July 1, 2027. Additionally, please create this as a written document, although tables inside the document are fine when appropriate.

Additional:

Lastly, can you please break this into a quarterly distribution, project how many estimated donor visits are realistic, and optimize the travel – if I can travel less while meeting my metrics, I would prefer to.

Strategic Annual Travel Plan – AI Logic Decision Making

Visits per region, Number of Meetings, Number of travel weeks, Sample Trip, Planning Notes, Travel Calendar, and Create a Report

Prompt:

Please create an annual strategic plan to accomplish the following:

Visit location A, location B, location C, and location D. Location C and Location D are the lowest priorities, most donors live in Location A and Location B and are therefore the highest priority. Each trip cannot be no longer than X days (from arrival to departure) although it can be shorter, but every day should have a minimum of X visits per day, however, X+ visits are encouraged if possible. At the end of the year, I need to have visited with X donors at minimum. Additionally, please include ideal months for travel to each location based on donor availability and safe travel conditions. Also, I cannot travel in months of X and Y, and I do not want to travel more than X weeks per month and I need at least two weeks of lead time to secure meetings before traveling.

Please include a sample trip schedule for each location listed, important planning notes, and any other important notes I should consider when traveling there. This plan will be used by myself for planning purposes and to share with my supervisor as part of our annual planning process and needs their approval. For viewing purpose, please start the travel calendar on the start of my fiscal year, date.

Additional:

Lastly, can you please break this into a quarterly distribution, project how many estimated donor visits are realistic, and include the total estimated cost for the year if I was to depart Location X Airport, my lodging is XXX hotels, and my rental car rate is \$XX a day, per diem is \$XX a day.

Meeting Follow-up – Documentation, Next Steps, and Maintaining Momentum

Turning menial but important tasks into automated steps that provides freedom

Prompt:

Please generate a follow-up email based on these meeting notes. My audience will be insert audience, and I would like my tone to be insert tone. Only use information provided in the notes, do not invent any other. Additionally, please list action items and who is responsible for them. My notes are pasted below: Paste your Notes from the meeting here.

Travel Itinerary – Narrowing down your travel to a city

Travel days, stops between cities, number of visits per day, predicated on anchor visits.

Prompt:

I am traveling to Location X on Date Range to visit with Constituents and Constituents. My anchor visit for Specific Date is in the evening in Location, for Second Date it is in the afternoon in Second Location, and the Third Date is in Third Location. Please create an ideal itinerary landing at Location Airport on Date around Time and leaves on Date around Time.

I would like to visit with at least X Constituents a day but would prefer X. I am fine with changing hotels each day as well. In addition, I have found that I usually cannot spend a whole day in one city.

Written Efficiency: Get back more of your day, through correspondence, reading, and creating.

Writing: Everything you write, let AI try.

How to get past writers block, shake up your traditional correspondence, or get new ideas.

i. Discovery Email Prompt – Ask for the fill-ins from the audience.

Prompt:

I need help writing an introductory/Discovery Email. I am having a hard time getting an X type Donor (\$X - \$X,XXX) to respond to my emails inviting them to meet when I travel to their area. I am a X officer whose role is to engage with donors - connect them with the university and ask if they want to make a X gift (\$XX,XXX+). How should I write an introductory email asking to meet?

Additional Prompt:

Can you make it more personal? They have given to the department of X and Y Sciences, specifically to scholarships.

Copy Past Example:

I need help writing an introductory/Discovery Email. I am having a hard time getting a Leadership Annual Giving Donors (\$1 - \$2,500) to respond to my emails inviting them to meet when I travel to their area. I am a regional development officer whose role is to engage with donors - connect them with the university and ask if they want to make a major gift (\$25,000+). How should I write an introductory email asking to meet?

Additional Prompt:

Can you make it more personal? They have given to the department of Animal and Range Sciences, specifically to scholarships.

ii. Thank You Card

Prompt:

Please write a thank you email to a donor. I want to thank a donor for creating a scholarship <Insert reason>. Their gift will create <insert area of impact>. I would like to invite them back to campus to visit a <insert area of impact>, <insert campus event>, and/or another campus event.

Additional Prompt:

Can you make it more personal and reference a specific <insert area of impact> event?

Copy and Paste Prompt:

Please write a thank you email to a donor. I want to thank a donor for creating a scholarship to honor their late daughter. Their gift will create 5 annual scholarships of \$1,000 to students studying Engineering. I would like to invite them back to campus to visit a College of Engineering event, a football game, and/or another campus event.

Additional Prompt:

Can you reference a specific event for the College of Engineering and make it more emotional?

Reading: Learn more in a fraction of the time

- a. Copy and paste an article URL into AI (Co-Pilot/ChatGPT/etc.) and ask for a summary.

Create a “Blank”

- a. Bio for LinkedIn, Conferences, Speaking Opportunities, etc.
- b. Summary of your report.

Constituent Conversation Prep.**Prompt:**

Hello, can you help me practice a donor conversation? My objective is below, and the following characteristics of the donor are who I would like you to pretend to be:

- i. Objective of the Call:
- ii. Age or Generation of Constituent:
- iii. Attitude:
- iv. Mood:
- v. Personality:

Show the mobile app version

Copy and Paste Prompt:

Hello, can you help me practice a constituent conversation? Please pretend to be a constituent with the following characteristics:

- i. Objective of the Call: *Secure a donor visit on next trip*
- ii. Age or Generation of Donor: *Donor is mid-60s*
- iii. Attitude: *Donor will most likely be skeptical*
- iv. Mood: *Happy/excited*
- v. Personality: *Analytical*