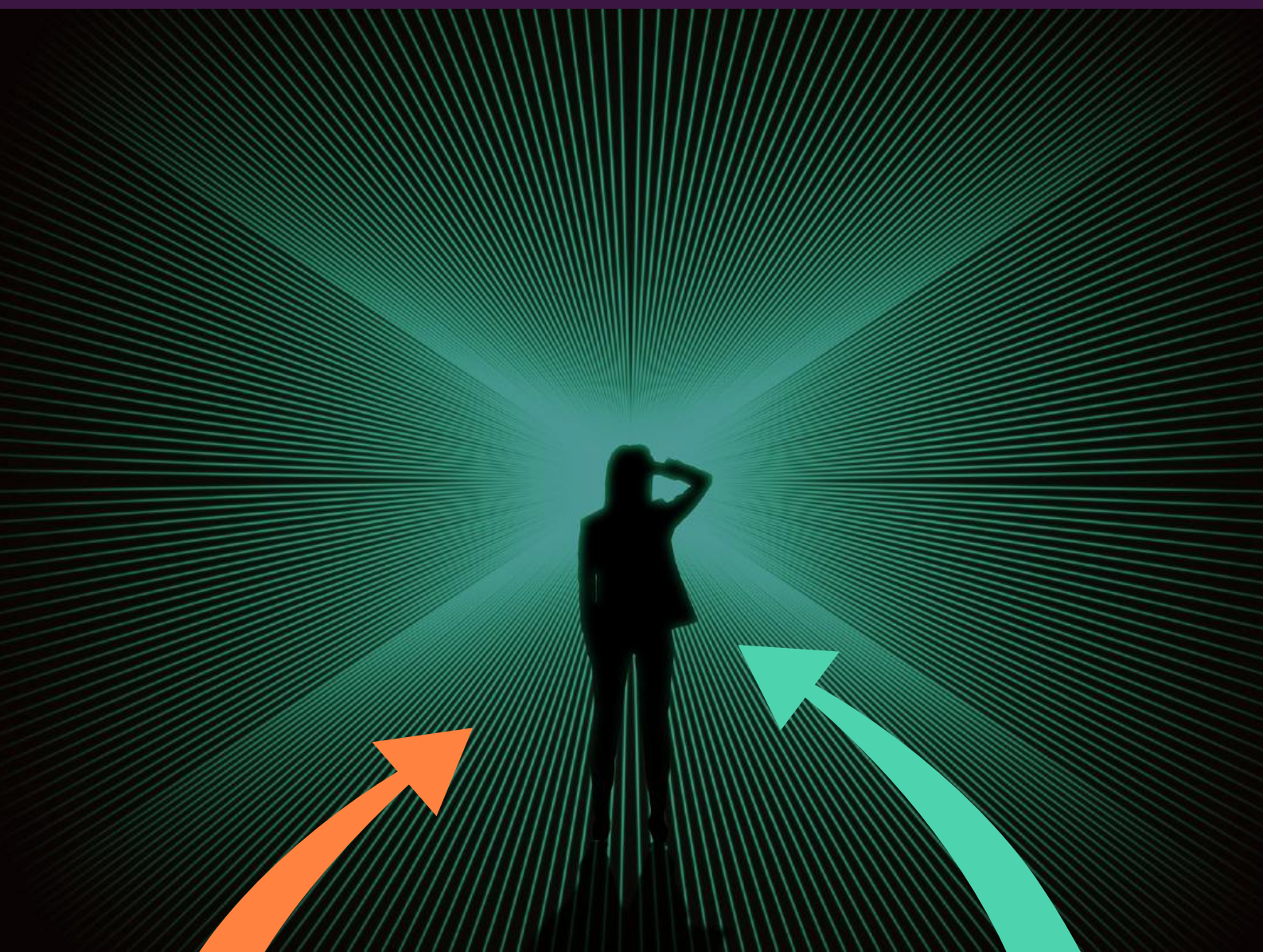


Navigating AI: A practical guide for membership organizations to unlock value and drive innovation



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01 Introduction: Utilizing AI for membership organizations

Hello!

Welcome to our AI for membership guide, designed to help you navigate one of the fastest-moving technologies that's also set to deliver some of the biggest advancements for membership organizations. Artificial intelligence (AI) isn't just a buzzword for the future—it's already here, and your members are experiencing it in their everyday lives.

The growing accessibility of AI is opening up exciting opportunities. AI can help enhance operations, improve member engagement, and unlock powerful insights from your data. But with AI evolving so quickly, it can feel overwhelming to know where to start or how to make the right decisions for your organization.

This guide is here to cut through the complexity and jargon, and provide you with practical, actionable advice tailored specifically to membership organizations. Whether you're just beginning to explore AI or already considering how to implement it, we'll walk you through what AI is, why it matters, and how it can be used effectively. We're not here to push AI for AI's sake, but to help you understand where it can make a sustainable difference and how to apply it responsibly.

AI isn't just a shiny new tool—it can help you do things better, faster, and smarter. But to get there, you need to make sure your data is ready, your technology is aligned, and your organization is equipped to leverage the potential AI offers. That's why this guide covers everything from the basics of AI, key tools and terminology, and an exploration of how AI can transform the way you operate.

01 Introduction: Utilizing AI for membership organizations

By the end of this guide, you'll be able to:

- Identify areas within your organization where AI can add real value—whether through improved member interactions, enhanced decision-making, or more efficient operations.
- Understand the steps needed to get your data ready for AI, ensuring it's well-organised and integrated across your systems.
- Explore AI tools that are accessible right now and know how to use them safely and effectively.
- Make informed decisions on whether to adopt open or closed AI models, balancing reputation, safety, and flexibility.
- Understand the technology environment and implementation steps necessary for adopting AI, from evaluating your current systems to selecting the right tools and creating a roadmap that ensures smooth integration and long-term success.

In short, this guide will give you the tools and confidence to make smart, informed decisions about AI—helping you boost member experiences, simplify your day-to-day operations, and set your organization up for exciting growth and innovation. Get ready to unlock the potential of AI and take your membership strategy to the next level.





02 The growing accessibility of AI

As AI tools become more accessible, they're moving beyond personal use to play a critical role in professional settings. How can organizations can leverage generative AI—not just for creativity, but to drive real value?

02 The growing accessibility of AI

2.1 What is AI?

“

“AI is the technology that transforms data into intelligent decisions and actions. It performs tasks that typically require human-like intelligence, such as:

Inputs: voice commands, text, images and data

Outputs: decisions, explanations, content creation, predictions and suggestions.

AI is the magic that turns data into decisions, automating complex processes and generating insights.

”

This definition, while accurate, is constantly evolving—just like the technology itself. When we asked ChatGPT to describe AI, this is the definition it produced. And while it's thorough, it may be a little biased! AI is advancing so rapidly that definitions need to be kept under constant review.

The capabilities of AI today far exceed what we once imagined. For a long time, the Turing Test—developed by Alan Turing in the 1950s—was the gold standard for AI. If an AI could convince a human that they were interacting with another person, it was considered intelligent.

However, AI has now far surpassed that benchmark. Modern AI doesn't just mimic human conversation; it learns from vast amounts of data, predicts future trends, offers contextual suggestions, and automates complex workflows. It's no longer about simply "passing" as human—AI is now about transforming the way we interact with information, make decisions, and improve organizational efficiency.

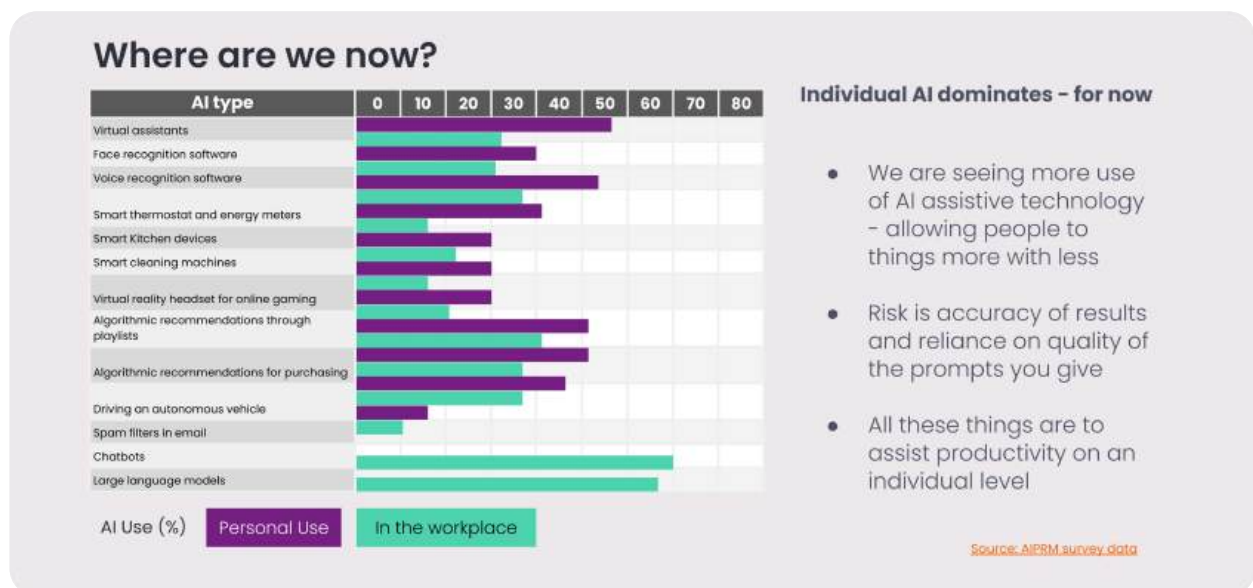
The key takeaway here is that AI is not static—it's evolving exponentially, meaning our understanding and definition of it must evolve too. Understanding the essential terms and concepts behind AI is becoming increasingly important.

If you want to effectively implement AI across your organization, you need to keep up with these shifts. In the next chapter, we'll cover the key terms you need to know to stay informed and ahead of the curve in this rapidly changing field.

02 The growing accessibility of AI

2.2 Where are we now?

Many of you are likely using generative AI tools to create images, write or version copy, or analyze data. Recent surveys confirm that these tools aren't just being used in a personal capacity – they are increasingly becoming part of the working environment.



As we'll explore, using AI at an organizational level is very different from using genAI tools to create fun pictures or blogs. It means leveraging large language models and giving them the context through your data that can deliver results that add real value.

There are over a **million open source models available** that have been developed by an ever-growing developer community. There are a lot of possibilities in using open-source models but first you need to be clear what you are trying to achieve.



03 Understanding AI – essential terms for membership organizations

AI is transforming the membership sector, but understanding key terms is essential to utilizing its full potential. Discover the core concepts and distinctions within AI, that will help you make informed choices that drive innovation and add value to your organization.

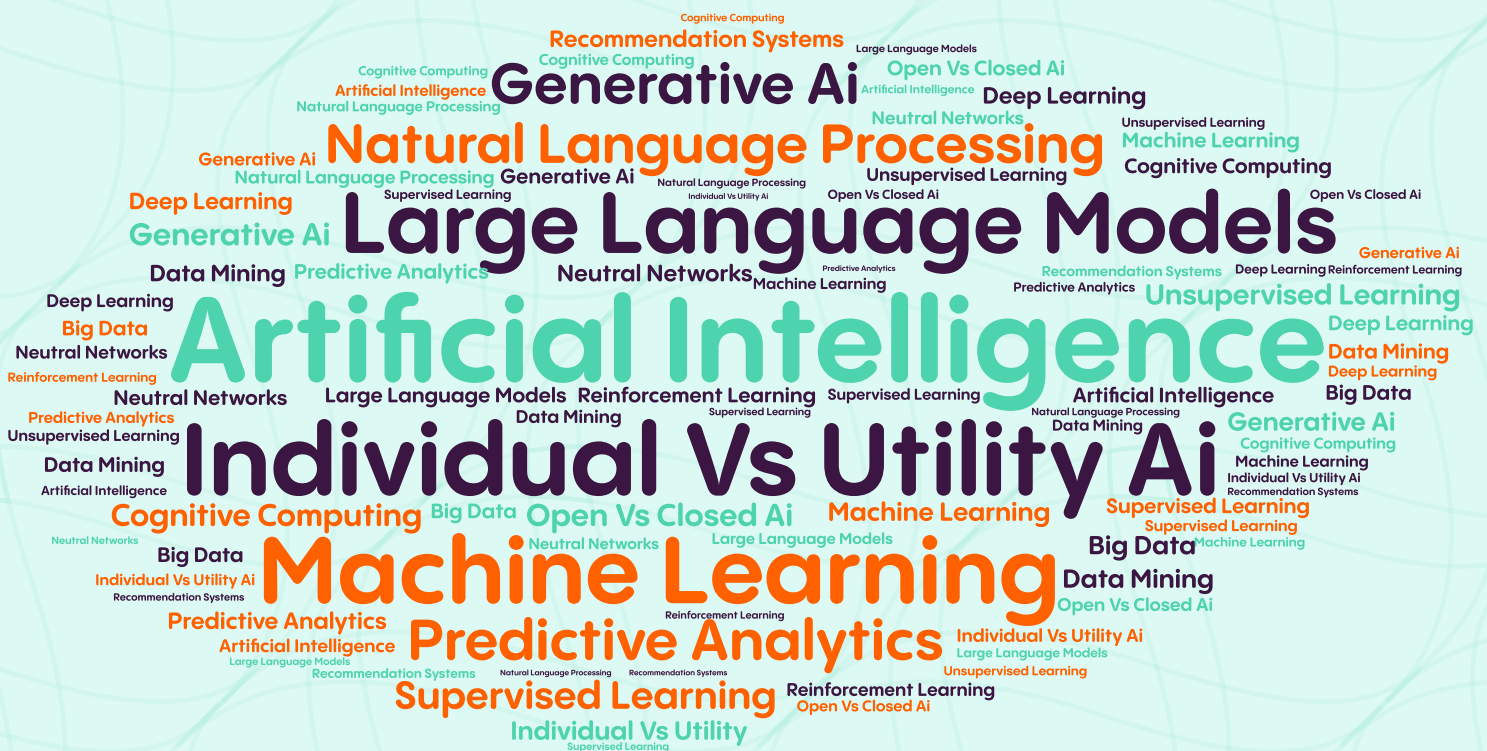
03 Understanding AI – essential terms for membership organizations

Artificial Intelligence (AI) is reshaping industries, including the membership sector. To fully unlock its potential it's important to understand the key terms and concepts associated with AI.

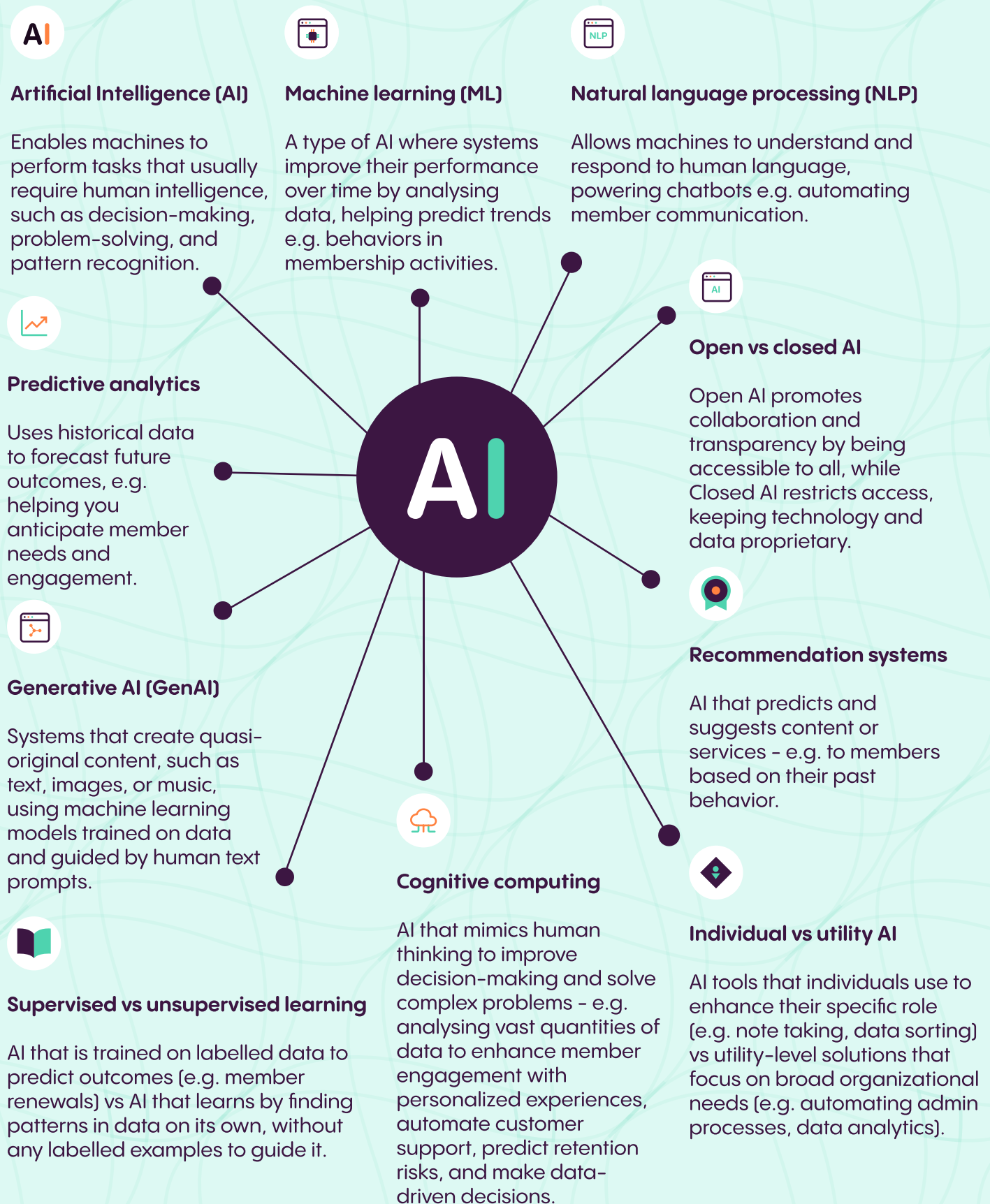
From generative AI (genAI) tools that assist with individual tasks to more complex systems that address organizational challenges, knowing the differences will help you make informed decisions and maximize AI's benefits.

On the next page we've created a useful infographic highlighting the essential AI terms to guide you in exploring how AI can drive innovation and deliver value to your membership organization.

A snapshot of rapidly expanding AI vocabulary



03 Understanding AI – essential terms for membership organizations



03 Understanding AI – essential terms for membership organizations

There are certain terms worth highlighting that we'll be using throughout this guide.

Generative AI (GenAI) – these are AI systems that can create quasi-original content (such as code, text, images or music) using machine learning models trained on data and guided by written prompts from people. They can also summarise and analyze information, and provide insights and recommendations.

Individual AI – by this we mean GenAI tools that people use to assist them as individuals in their job or personal life.

Utility AI – this is AI that integrates with your organization's membership technology and can automate, enhance or replace processes, answer member questions, provide insights and make decisions on your behalf.

Open vs closed data – information publicly available on the internet vs information that is gathered, owned and managed by you which you control the access to.

We'll revisit these and other terms later when we explore the art of the possible in membership AI. But first, are you aware of the generative AI tools and prompts that can save you time in your membership role today?



04 Assistive AI tools and useful prompts

Strong prompts are key to getting great results from assistive GenAI tools and the large language models that power them. See our favourite AI tools for everyday tasks and discover how to create context-rich targeted prompts that deliver accurate responses and reliable results.

04 Assistive AI tools and useful prompts

4.1 Assistive AI tools we like

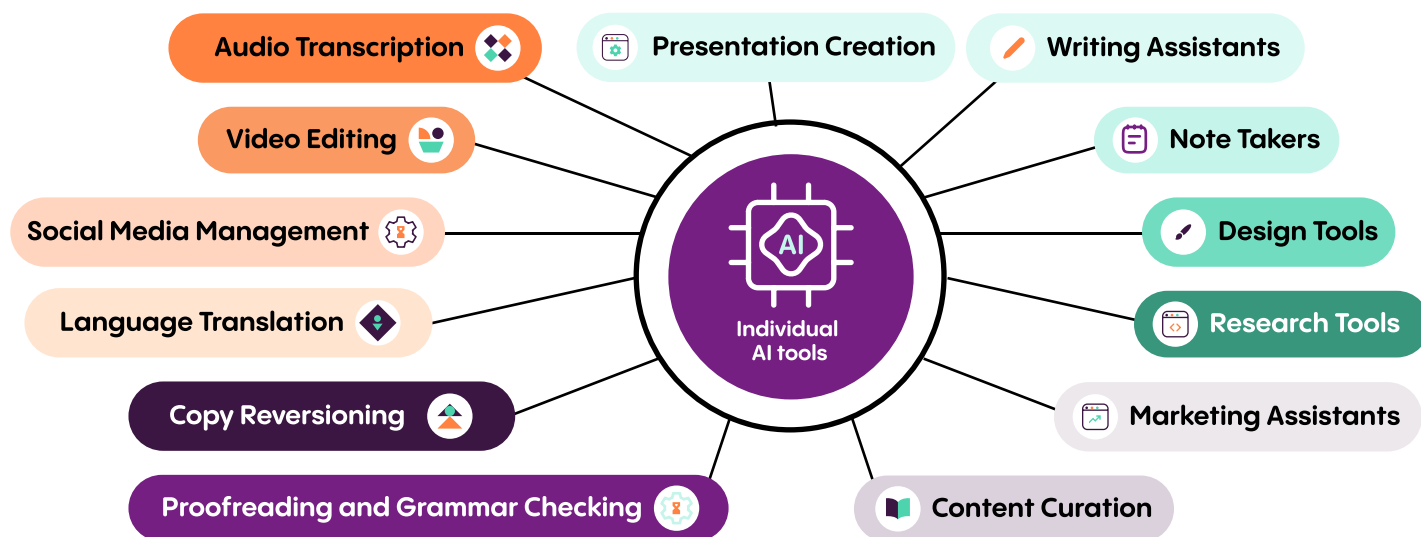
In a sector where you're constantly asked to do more with less, your time is one of your most valuable assets. There are hundreds of individual assistive tools available that are free or low-cost, making it easy to streamline tasks. But which tools are suited to your specific needs, and how can you ensure they're safe and reliable?

Prompts are sets of instructions or queries you provide to an AI system to generate a specific response. The prompts you use can significantly impact the quality of your results, so it's crucial to know how to use them effectively.

We've put together a handy cheat sheet of practical tips and membership-focused prompts to help you make the most of AI in your role with insights, tips, and recommendations from across our team.

None of the tools we suggest are ones we sell or have any commercial ties to; they're simply tools we've found useful after trying a few, and we think you might too.

Assistance AI tools



04 Assistive AI tools and useful prompts

4.1 Assistive AI tools we like



AI writing assistants



Ally Wheeler
Senior Customer Success Manager

Tools I like: **Grammarly & Wordtune**

“

These help me ensure my client emails are polished and professional and my tone is respectful.

”

TIP: Add these Google Chrome extensions to review your writing across platforms. Instantly optimize your copy by selecting formality, tone of voice, and your profession for context. Use them to elevate your member engagement, renewal and recruitment campaigns.



AI note takers



Jonathan Hunt
Customer Success Manager

Tools I like: **Fathom**

“

An amazing AI note-taking tool which transcribes and summarises your meetings.

”

TIP: Link Fathom to your video conferencing account (e.g. Zoom) so it knows to auto-join all your meetings. You can turn off Real-Time Coaching if you don't want to see that you are monologuing!



AI design tools



Luke Holderness,
Creative Director

Tools I like: **Midjourney**

“

A great resource for exploring different styles, colour palettes and patterns, and can help you generate images for your website.

”

PROMPT: Create a UI design for a membership association for tradespeople, show a member's homepage, including a welcome to Bob [insert title/role], a list of benefits and upcoming events.



AI research tools



Emma Clark,
Senior Consultant

Tools I like: **Claude, Yasna**

“

Claude is a conversational & creative AI assistant that provides clear research summaries. Yasna is great for conducting in-depth interviews.

”

TIP: Use Yasna to conduct UX research with website users and produce a report with insights. Claude can categorise and synthesise this type of qualitative data, letting you quickly identify areas that need improvement.

04 Assistive AI tools and useful prompts

4.1 Assistive AI tools we like



AI for marketing



Aika Peto,
Marketing
Director

Tools we like: ChatGPT for marketing

“

ChatGPT can be a versatile marketer's assistant, handling tasks such as data analysis, content repurposing, optimisation, and SEO.

”

TIP: It's best to keep your prompts short and use follow-up prompts after each response to get a more refined result.



AI for content curation and management



Dan Edwards
Head of Content

Tools we like: ChatGPT for content

“

As a professional writer, ChatGPT is brilliant for refining, enhancing, and proofreading copy, plus it swiftly repurposes content for various platforms.

”

PROMPTS:

SEO-optimized articles:

I have written a thought leadership article for [X membership org] aimed at professionals in the [X sector]. The article will cover [insert topic], and I want to optimize it for SEO. Please:

1. Identify the best SEO keywords related to [topic] in the X sector.
2. Create a compelling SEO title and meta description.
3. Suggest how to structure the content for SEO, including headers (H1, H2, H3), and where to place keywords.

Copywriting:

Write an email in British English where the sender works for membership body [X], reminding the member that the deadline for their renewal is in one month. They have previously received two reminders but have not taken action. Highlight the value using the benefits listed on [X website]. Make it friendly, persuasive, and in the tone of [X org].



AI for event research and comparison



Kat Paines
Head of
Marketing

Tools we like: ChatGPT for event research

“

When you're trying to find good event spaces in London it can be tricky to do desk research if you have a list of criteria you're trying to fulfil! Chat GPT is a great place to start to make you a shortlist that you can then look into in more detail.

”

PROMPT:

Event research: Please collate a list of 10 event venues in London, within a [insert distance] of [location]. They need to have a private meeting space suitable for up to [X] people, have AV capabilities, provide catering, and be a fully accessible venue. Look for spaces within [price bracket] for an all day hire.

Effective prompts are key to getting meaningful results from genAI tools such as the above, and large language models alike. But how do prompts work?

04 Assistive AI tools and useful prompts

4.2 Prompt engineering – what happens in the background?

Whether using genAI tools for everyday tasks or language models to solve broader membership challenges, the principles behind prompts are the same.

Large language models (LLMs) break text down into "tokens," with each token being equal to roughly four characters. Each token is individually encoded within an LLM's neural network and corresponds to a specific concept, word, or part of a word.

All LLMs have a context window – the number of tokens they can handle in a single prompt. Claude for example – an AI assistant powered by LLMs – can analyze the equivalent length of three Harry Potter novels!

The more informed your context is – i.e. using reliable data like your organization's own knowledge repository – the more accurate and relevant your answers will be. So what are the core components of creating strong prompts?



04 Assistive AI tools and useful prompts



AI TIPS: HOW TO CREATE BETTER AI PROMPTS

- Give your model context – e.g. your organization's knowledge files – to reference as part of your prompt
- Provide a question
- Provide grounding in specific areas – e.g. "I want you to stay focused on these areas, or "answer from the point of view of a CEO"
- Provide the output format you want
- Ask the model to show its reasoning and break down the answer step by step – gives better results
- Assign positive or negative labels to data (e.g. for sentiment analysis) with examples of what the labels mean
- Adding emotion to your prompts can produce better results!

“

"If you follow these steps it's possible to get AI models to respond consistently – allowing you to use them with your systems. Adding labels to the information you provide the model can also produce better results.

For example, if you want to do sentiment analysis on 25 member interactions you can label certain member responses positive and others negative. This along with a description and examples of the desired output, will give you a much better analysis than just providing the model with a big list of responses to analyze. Context, not just content is King and Queen."

— Alex Skinner, Chief Executive, ReadyMembership

”

So, if you use this formula for your prompts you will get stronger, more accurate and reliable results:

Context + question + grounding + defined output format = better results

What membership challenges can you solve if you use these types of prompts? Find out next, in 'The art of the possible'.



05 The art of the possible

AI assistants can streamline individual tasks, but they also offer access to open-source models that address wider organizational challenges, potentially paving the way for customized solutions. Discover practical steps to start utilizing AI for your membership organization.

05 The art of the possible

5.1 AI assistants for everyday tasks

Earlier we shared our team's favourite gen AI tools that can help speed up everyday tasks and save you time in your role.

These AI assistants have free and paid versions and perform tasks including writing reports & articles, creating basic code, generating images, summarising text, answering questions and analysing data. You're probably most familiar with Claude, ChatGPT, Google Gemini & Microsoft CoPilot.

Behind these tools is a **thriving AI developer community** that has created over a million models for practically every task you could imagine - which can be broadly grouped into two categories.

5.2 Open-source vs closed-source models

Trust is central to your relationship with your members and key to maintaining your organization's reputation. So it's vital to understand the difference between the main types of AI models available, how they work and the impact of using them.

1 Open-source AI models

Open-source AI models are publicly and freely accessible systems that developers can use for various applications and purposes. Examples include **Llama 2**, **OpenAI's CLIP** and **GPT-Neo**. Their workings are transparent, allowing collaboration. However, this can bring greater security risks due to publicly available code and data.

2 Closed-source AI models

Closed-source AI models are proprietary systems that keep their code confidential. By restricting access to underlying code and data sources, developers have more control over the system. Examples include **GPT4.0** and **Google's Gemini**. While closed-source models can be less transparent, they are likely to be updated more frequently and have better security.

05 The art of the possible

When deciding between closed or open AI systems, flexibility and adaptability are key—especially as AI is evolving so rapidly. For membership organizations, it's crucial to consider how data is ingested into your systems, whether through one or multiple AI models, depending on your specific goals. With AI developing at such speed, having the flexibility to switch out models or tools is essential to keep pace with new advancements.

Composability becomes vital here; you need a solution that can adapt and grow with your organization, rather than locking you into a fixed system. This allows you to continuously assess your needs and adjust your AI strategy as the technology and your organizational demands evolve, ensuring your AI approach remains effective and future-proof.

5.2.1 Demo – understanding images using open models



AI TIP: IMAGE DETECTION



There's a lot of fun to be had generating AI images - such as this cute hamster on a skateboard here. But open-source AI can also work with images in a much more useful way!

Adding alt-tags to all your website images is important for visually impaired users but can be time-consuming.

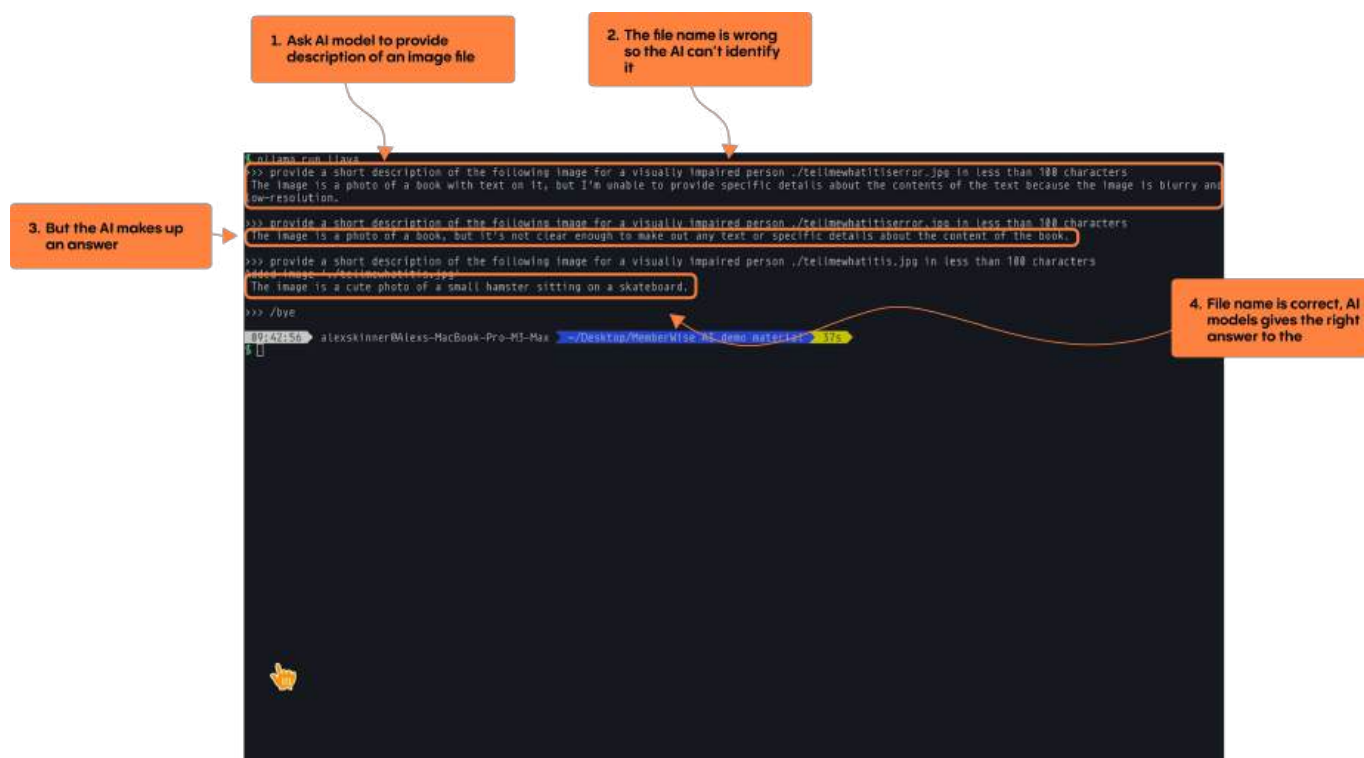
You can use AI models to easily analyze and describe all the images on your website.

Imagine a scenario where you upload several images to your website and AI automatically detects them and writes descriptions for visually impaired people. The screenshot below shows a prompt that asks for a short description from an image file provided. Watch the demo video [here](#).

You'll see that we deliberately included a mistake in the file name to show that AI models will answer even if they don't have the right information! You need to write your prompt in such a way that it forces the AI to admit that it doesn't answer.

05 The art of the possible

Using large language model Llama 3.2 to describe images



5.3 Open vs closed data

AI models generate output by accessing publicly available information and datasets from the internet and extracting relevant information to answer prompts. The results may be fast but they aren't always accurate, or complete, and can be vulnerable to bias or not given in the correct context.

This creates challenges for membership organizations; for example, if you're looking to use an open AI model and public data to answer common member questions there's a risk that you share misleading answers – and damage your reputation. As mentioned earlier, you can create better prompts and get more reliable results by giving your AI model proper context – in this case – your organization's data. A closed-source system that works with data you own can help mitigate AI risk and protect your reputation.

05 The art of the possible

5.4 Individual vs utility AI

So far, we've been focused on individual AI tools and systems that can help you complete tasks more quickly and save time that can be used to develop events, resources and services for members.

They are assistants that can create content for you, inform your decision-making and make recommendations using the prompts and data you give them.

Utility AI is something entirely different. These models interact directly with your own technology and data to solve challenges on an organization-wide level. If approached correctly it can open up a world of opportunity for you and your members – which we'll cover in detail later.

To harness this AI, however, your data must first be ready.



05 The art of the possible

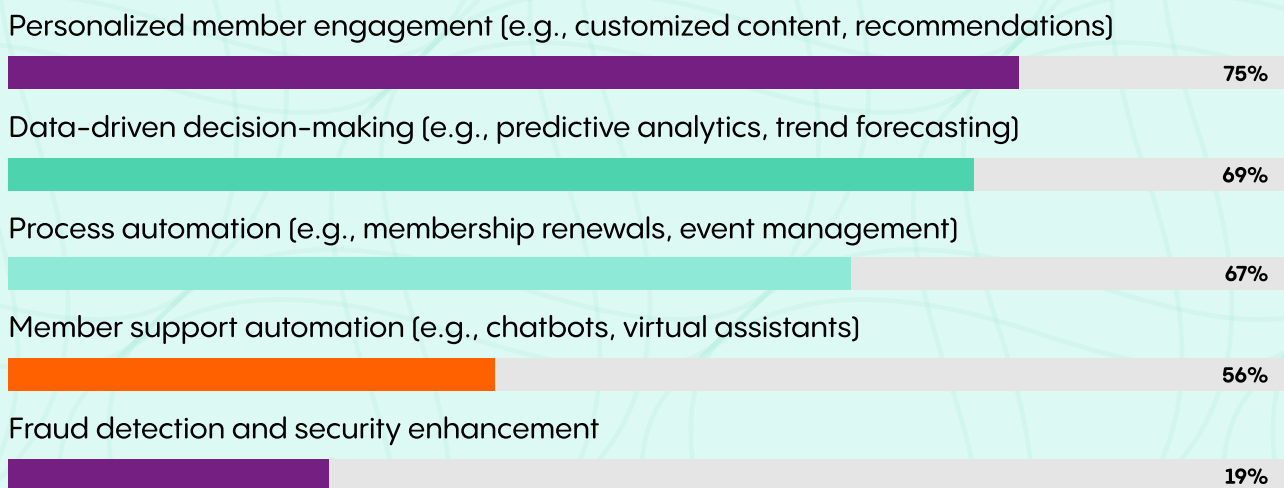


AI in membership – identifying opportunities

There are so many possibilities with AI that it can feel overwhelming. However, surveys show that membership organizations understand the difference AI can make to their operations and for their members.

We asked attendees of our [MemberWise webcast](#) – Harnessing AI – Practical Insights and Actionable Steps for Your Membership Organization – about the most valuable applications they have seen or expect from AI.

What are the most valuable applications you've seen (or expect) from AI?



AI membership insights

Our poll showed that the majority of professionals see AI adding value to all the main areas of membership operations.

Personalising member engagement through customized content & recommendations (75%) and data-driven decision-making (69%) are seen as the areas where AI will have the most impact – closet followed by process automation (69%).



06 Getting your data ready for AI

Before you can harness AI's potential, you need to ensure your data is accurate, accessible, and well-structured. Discover the crucial steps that set the foundation for effective AI-driven insights and member engagement.

06 Getting your data ready for AI

'Garbage in, garbage out' – a phrase first used in the 1950s – is a well-known concept in computer science. It means the quality of a system's output is determined by the quality of its input. AI models can now read more than text including tables and graphs. However, if your data is poor quality, inconsistent and inaccessible then it's of little use to AI. The higher quality and more integrated your data is, the better.

6.1 What do we mean by data?

When we talk about 'data' in the context of technology in the membership sector, the first thing you probably think of is what you hold in your CRM.

6.1.1 CRM data

Your CRM holds a vast amount of data that can be referenced by utility-level AI to give it context:

Member Demographics and Profile Data Name, address, email, D.O.B, gender, ethnicity, location, nationality, employment	Membership Status and History Type (e.g. individual, corporate, student), level/tier, Join & Renewal Dates, Membership Duration, Referral Source, Status (active, lapsed, expired, pending).	Engagement and Activity Data Event Attendance (webinars, conferences, workshops), Survey Responses, Committee / Board Participation, Online Community Activity, Volunteer Activities, Polls and Feedback Data
Financial and Transactional Data Payment Methods (e.g. credit card, direct debit), Invoice History, Purchases (e.g. products, reports courses), Donations, Sponsorship.	Communication Preferences Preferred Communication Channels (email, phone, SMS), Marketing Preferences, Communications Consent (GDPR compliance)	Website and Digital Behavior Data Login Frequency, Pages Visited, Time Spent on Website, Downloads (whitepapers, reports), Search Queries, Content Interactions (blog posts, e-newsletters), Social Media Engagement
Professional Development and Learning Data CPD points/credits, Course Enrolled or Completed, Skills and Certifications Earned, Professional Goals and Interests	Advocacy and Influence Data Petitions Signed, Lobbying or Advocacy Involvement, Policy Submissions, Campaign Contributions	Advocacy and Influence Data Petitions Signed, Lobbying or Advocacy Involvement, Policy Submissions, Campaign Contributions
Referral and Recruitment Data Member Referral Programs, New Member Recruits, Referral Sources, Lead Generation Data	Partner and Supplier Data Corporate Partners, Service Providers, Sponsors Partnership Agreements	Compliance and Legal Data Data Protection Consent (GDPR), Terms and Conditions Agreements, Membership Contract Agreements, Code of Conduct Violations

06 Getting your data ready for AI

6.1.1 CRM data

Your CRM data should already be helping you extract insights, personalize member experiences, and streamline processes through targeted communications. Utility AI elevates this by analysing patterns in member behavior, predicting future actions, and making data-driven decisions that can deepen engagement and retention.

It can also identify opportunities for new services or benefits based on emerging trends and feedback. With these advanced capabilities, you can transform data into a strategic asset.

However – do mitigate risk by ensuring that personally identifiable information (PII) is securely managed and protected throughout the process.

However, for utility AI to provide comprehensive trusted answers and recommendations for your members and public consumption needs to also reference a different kind of data – your organization's knowledge.

In membership AI, data = CRM data + your knowledge data.

“

“Membership organizations should be wary of feeding personally identifiable information (PII) into language models – especially ones that are hosted elsewhere or outside of their control. There are techniques to remove PII or tokenise data, but right now it's probably best to avoid data with too much PII.”

— Alex Skinner, Chief Executive, ReadyMembership

”

06 Getting your data ready for AI

6.1.2 Knowledge data

As a membership organization, your knowledge and intellectual property (IP) are key to your unique value proposition. They are central to the value you provide to your members and represent a highly valuable asset.

In today's digital age, where so much information is freely available online, membership organizations must work even harder to establish themselves as trusted, high-quality sources. While quality and trust are vital, usability and findability are equally important.

Many organizations face challenges like limited subject-matter experts to address member queries, frequently recurring questions, or members struggling to find what they need—whether due to poor search functionality or simply because they aren't sure what to look for.

Utility AI can bridge these gaps by tapping into your knowledge base and CRM data to provide personalized, context-specific responses and suggest relevant next steps.

In highly regulated environments, Utility AI can even be trained to identify when it's appropriate to offer automated responses and when a human touch is required, ensuring both accuracy and compliance.

Your knowledge data comes in many formats:

Regulatory guidance, legislation, policies, rules, best practice (documents)	Webinar recordings	Industry reports & Whitepapers (thought leadership)
Lectures (videos, transcripts)	Internal knowledge base	CPD & training resources
Events (videos, transcripts, presentations)	Member advocacy and feedback	Engagement and Participation data (surveys)
Member Benefits Communications	Targeted Segment Communications	Regular Member Updates
Community knowledge (forums, groups)	Market research: competitor insights, industry trends	Personalized Member Communications

06 Getting your data ready for AI

6.2 Data management and curation

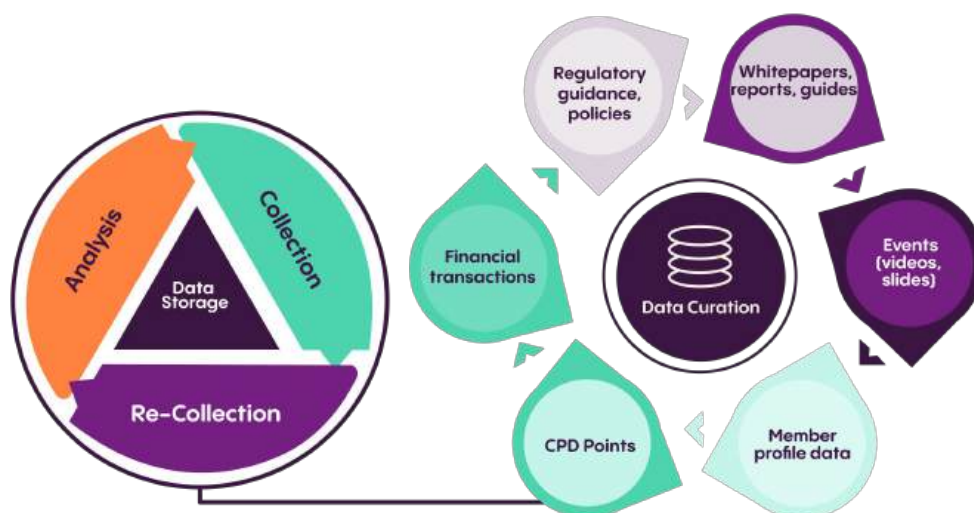
Traditionally, membership data and knowledge have been user-generated—whether by you or through members updating their personal details, engaging with resources, or attending events—and then captured within CRM and CMS platforms.

Most systems now also gather behavioral data in real-time as users interact with your digital platforms, such as tracking page views, downloads, or clicks on specific content. This blend of explicit user input and system-captured behavior offers a richer, more dynamic understanding of each member.

Utility AI can bridge these gaps by tapping into your knowledge base and CRM data to provide personalized, context-specific responses and suggest relevant next steps. In highly regulated environments, Utility AI can even be trained to identify when it's appropriate to offer automated responses and when a human touch is required, ensuring both accuracy and compliance.

Steps of data curation

CRM & knowledge



Consolidating all your data into a single platform creates a 'single view of truth' and offers a 360-degree view of each member. This makes the data easier to leverage with Utility AI, unlocking new opportunities to analyze and interact with your data—topics we'll delve into later.

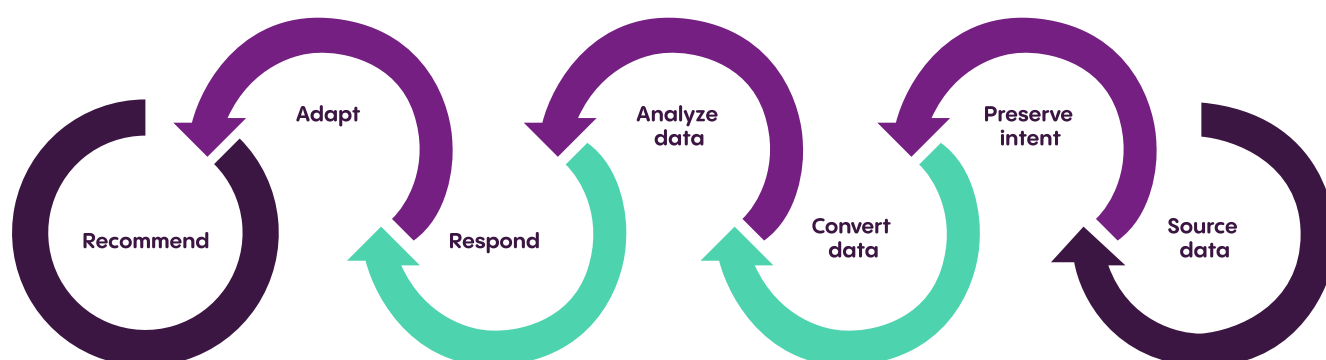
06 Getting your data ready for AI

6.3 How AI curates data

AI manages data and knowledge differently. AI models are constantly learning, adjusting, updating and creating knowledge based on the information they receive and the interactions they have with users.

For example, if you record your members' calls as standard for training purposes, you can give your AI model transcripts of those conversations to learn from. You can add labels to responses so that the AI understands what is a 'good' or 'bad' comment or staff response.

Steps of AI data curation



*Strategies will vary depending on your desired outcome and quantity of data

Advanced Utility AI fundamentally transforms how data and knowledge are curated, offering a different model than traditional approaches. While conventional methods depend on manual updates and user-generated inputs, AI introduces a more dynamic, adaptive system. It continuously learns from user interactions, adjusting and refining its understanding without needing constant human intervention. This allows AI to not only process data but also to generate new insights, identify trends, and make recommendations that can optimize member experiences.

06 Getting your data ready for AI

Crucially, AI doesn't just react to user data—it actively interprets context, tone, and intent, allowing it to adapt responses to be more empathetic or aligned with a member's needs. This capability enables AI to suggest next steps, recommend resources, or highlight emerging opportunities based on a nuanced understanding of member behavior.

However, it's vital to ensure that AI respects the original intent of your data, as subtle nuances like sarcasm or mixed emotions can sometimes be misinterpreted. To mitigate this risk, you can establish clear guidelines and training data that reflect the tone and style you want the AI to follow.

Regular reviews and audits of AI-generated outputs help ensure consistency and accuracy. Additionally, incorporating human oversight in complex cases can ensure that sensitive or ambiguous responses align with your organization's goals, providing a balanced approach between AI automation and human expertise.

6.4 Why your technology maturity matters

6.4.1 First a note on data quality

It should go without saying (but it is very important, so we are going to say it) that ensuring data quality is critical to the success of AI-driven systems.

High-quality data serves as the foundation for accurate insights, predictions, and recommendations. To maximize the effectiveness of AI, it's essential to maintain clean, up-to-date, and well-organised data.

This includes removing duplicates, correcting inaccuracies, and standardising data formats. A best practice approach involves regular data audits, implementing clear data governance policies, and fostering a culture of data stewardship within your organization. By prioritising data quality, you ensure that AI can deliver meaningful, reliable, and actionable results aligned with your needs and ambitions.

06 Getting your data ready for AI

6.4.2 Your data technology maturity journey – where are you now?

The MemberWise 2023/24 Digital Excellence report revealed that 63% of organizations have partially integrated systems, while 25% have no integration at all. Siloed data and separate systems are still a big challenge for membership organizations – and will be one of the biggest barriers to adoption of utility AI.

To move from siloed data to fully integrated systems, membership organizations need to invest in a strategic approach to technology. This starts with selecting the right platforms for CRM and CMS (we know of a great one called ReadyMembership 😊) that offer seamless integration capabilities, allowing data to flow freely between all your systems. Membership organizations should prioritise platforms that can consolidate member data into a single view of truth, creating a 360-degree view of each member.

In addition, investing in data integration support and middleware can help connect existing systems, reducing fragmentation and enabling a more unified data environment. Cloud-based solutions also offer scalability and flexibility, ensuring that as your organization grows, your systems can adapt without adding complexity.

“

“Search, and the website experience will be radically different in the next few years. Bringing together our silos of data and knowledge together will make it much easier to make things operate with AI.”

— Alex Skinner, Chief Executive, ReadyMembership

”

06 Getting your data ready for AI

6.4.2 Your data technology maturity journey – where are you now?

By adopting an integrated technology infrastructure, you can then optimize your data for AI, unlocking its full potential across multiple areas. With all data consolidated into a unified system, AI can analyze it holistically, uncovering valuable insights that would otherwise remain hidden in silos.

In a fully integrated environment, AI can quickly identify trends, optimize resource allocation, and enhance the overall member experience, while also reducing manual workloads and operational bottlenecks. This positions your organization to operate more efficiently, allowing staff to focus on high-value, strategic activities.

Steps of data curation

How membership organizations can move towards AI readiness





07 Case Study: FEDESSA – how to prepare data

As we have seen, getting your data ready is key to utilizing utility AI for your organization. As Rennie Schafer, CEO of the Federation of European Self Storage Associations discovered when cleaning and consolidating their data – less can be more.

07 Case Study: FEDESSA – how to prepare data

The more advanced your data maturity the easier it is to make your data available to AI. However, understanding which data is most useful is essential when thinking about what to make available to an AI solution.

The Federation of European Self Storage Associations (FEDESSA) represents over 2500 self-storage facilities across Europe – all members of 16 national associations which are part of FEDESSA. Previously, each association had its own CRM, website, and email platforms, which were disconnected locally and with FEDESSA. Data was siloed, duplicated, inconsistent, and inaccessible. Members received multiple and conflicting information from their local association and FEDESSA.

For CEO Rennie Schafer, it was essential to bring all data into a single view and take a new approach to collecting and organising data. A review of data collection highlighted that FEDESSA was gathering data they didn't use. They reorganised their data around four key service pillars and reduced the number of questions on their join form, focusing on members' industry experience, topics of interests, and technology needs.

Rather than overwhelm members with 20-question surveys, they ran fortnightly polls asking a single question about self-storage. This has accumulated ongoing useful insights about their members.

With streamlined structured data tagged with members' topic interests, FEDESSA personalized emails, newsletters and web content in ReadyMembership. However, they gradually realized the danger of taking data segmentation too far: members were regularly clicking on generic content they hadn't expressed interest in.

Email and website behavior have also been an invaluable data source, providing insights FEDESSA has acted on. From reminding members about various benefits four months before renewal, to engaging late event bookers with timely but gentle nudges, and gathering feedback during rather than after training. For Rennie, less data can mean better data, that has greater value:

"Why do you want to collect data? Are you going to use it, do you need it? Asking the right questions at the right time, will set you up for success."

FEDESSA – delivering results through data optimisation

- Increase in member retention from 85 to 94%
- 50% of members renewing two months before renewal date
- Reduced admin by 12 hours per week
- 29% increase in members attending events
- 29% increase in member survey results
- 320% increase in email click-throughs



08 Using utility AI for your organization

AI offers extensive potential to enhance membership services, but it's crucial to define your goals and understand how AI aligns with your strategic vision. See the questions you need to ask and the potential use cases for using utility AI in membership.

08 Using utility AI for your organization

8.1 Why do you want to use AI?

The potential uses of AI that integrate with your technology ecosystem are extensive. Before you adapt AI, however, you need to be clear about the role you want it to play. How will it support your overall strategy? What impact will it have on your members and on your team?

How will your members benefit from your adoption of AI? What is your technology doing well already? Where are the gaps and opportunities? For example, you can already automate and personalize member content and marketing with current platforms - how can you use AI to take this to the next level?

Being clear about what AI means for your organization operationally is also important. A widely held concern is that AI will replace jobs. While no one can predict the future it is more likely that AI will instead change them fundamentally.

Taking away mundane, time-consuming administrative tasks could free up your team to develop members' services and new opportunities.

Here are some key questions to ask:



WHY DO YOU WANT TO USE AI?:

- Do you want to use AI purely as an assistive technology? (e.g. answering commonly asked questions about membership)
- Do you want to use AI to solve more complex member enquiries? (e.g. direct them to specific points in a document or video to answer policy or legal questions)
- Do you want AI to automate membership administration? (e.g. assessing membership application documentation)
- Do you want AI to deliver insights? (e.g. using your data to identify and predict patterns in membership behavior)
- Do you want AI to use data analytics to automatically make decisions and act on them for you? (e.g. invite or exclude members to/from events)

Of course, your approach to AI will change as you and your members engage with it and as it evolves and quickly advances. But before you integrate utility AI with your platform and data you need to be clear about the purpose and the direction you are heading in.

08 Using utility AI for your organization

8.2 Why your knowledge is your organization's superpower

The knowledge that you and your members have created, shared and accumulated over time is hugely valuable. As we mentioned earlier, this data forms the bedrock of your member value proposition and is the foundation of your members' trust. It's also intellectual property that can be used to develop new revenue streams.

Large language models can use your organization's closed knowledge data to address common membership problems and needs.

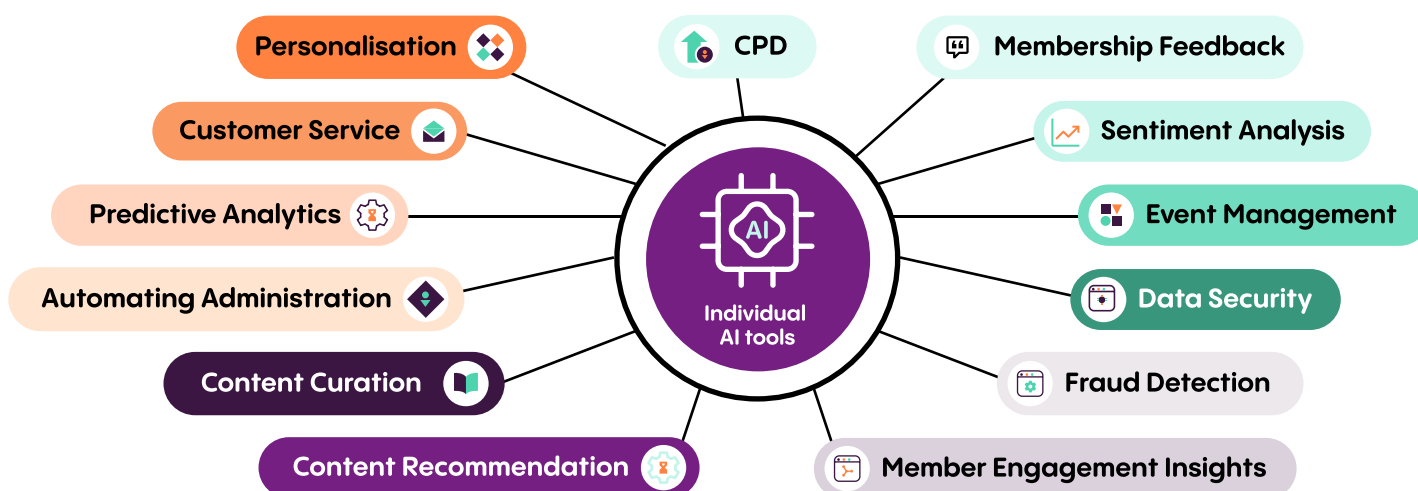
8.3 Membership AI use cases

As we showed earlier, when you use your own closed data and knowledge sources with AI models, the results are more nuanced, tailored and reliable. The easiest and safest starting point for utility AI is in assistive capacity. An AI-enhanced assistant can work with your knowledge to answer commonly asked questions for a closed audience – your members.

There are of course a host of other areas where AI can reduce administration, provide insights or enhance the user experience – which you can see here.

Utility AI Your closed knowledge superpower

AI in membership – potential use cases



08 Using utility AI for your organization

8.3 Membership AI use cases

AI in membership	Potential use case or scenario
Membership applications	AI can automatically assess documentation submitted for member applications against criteria and request further action if required.
Case management	AI can assess large volumes of dispute cases (for example, a union with 100'000 cases) and use sentiment to identify those that need escalating.
Member helpline	If you record members' phone calls as standard (with permission in your T&Cs) you can use your AI to analyze transcripts, summarise issues and train your staff.
Enhanced CPD	Add your training and knowledge to AI to provide hyper-personalized continuous professional development. This could be an attractive member benefit.
Event management	AI can identify, invite or exclude members based on prior attendance, engagement and interests.

The technology to enable this is developing rapidly and fast becoming reality with membership organizations already exploring how they can use their knowledge repositories with AI to answer member queries.

But how can you start using AI models and tools now to help solve these broader membership challenges? Here are some practical examples of what is possible.

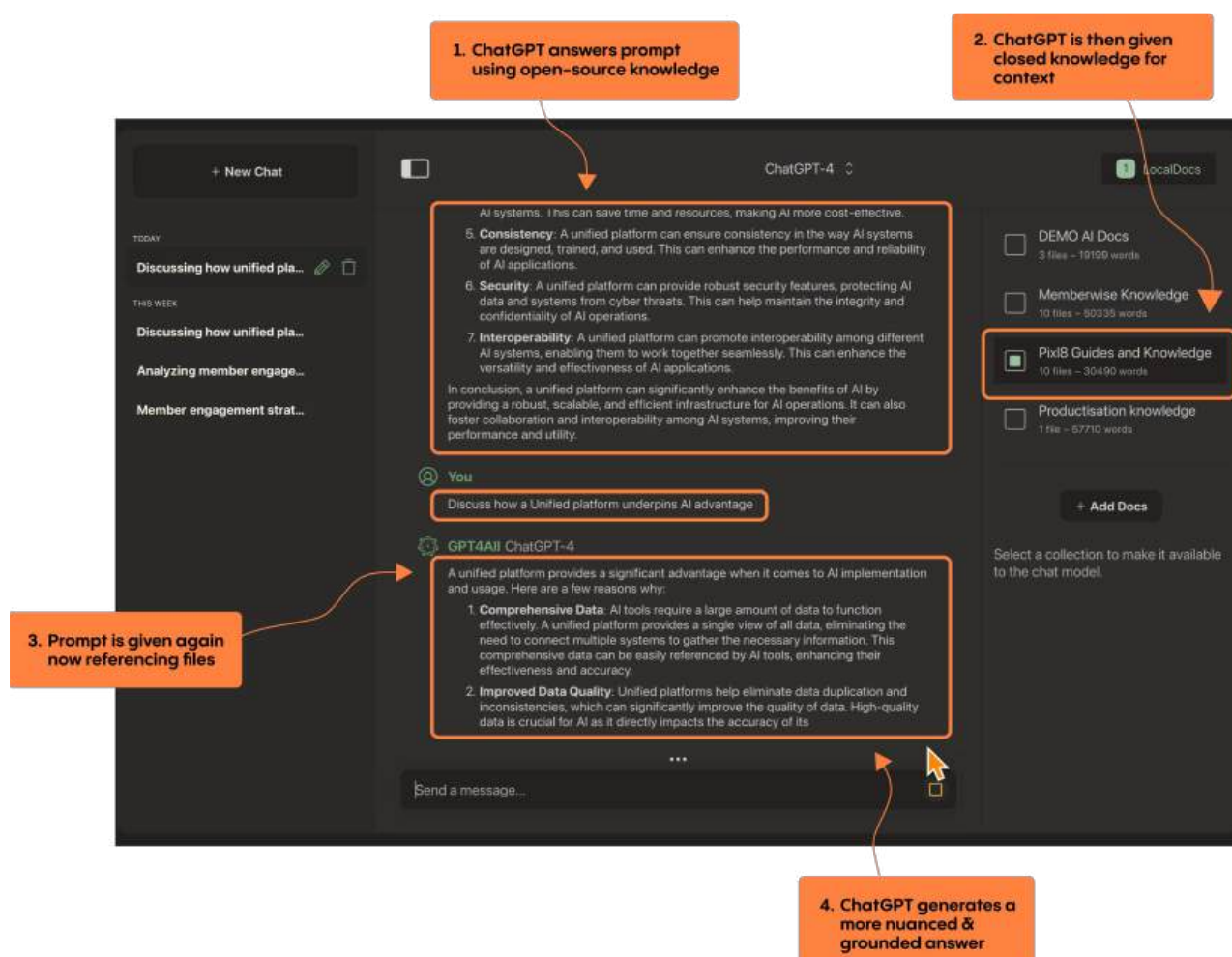
08 Using utility AI for your organization

8.3.1 Demo – making your knowledge findable

As discussed, adding your own knowledge to an AI model gives it the context to provide answers that are accurate, relevant and specific to your user needs. The process is called retrieval augmented generation (RAG).

The user gives a prompt and the AI looks at local knowledge sources (held in a vector database or graph), extracts relevant information and uses it for context in its answer. It then grounds the response to check permissions and appropriateness of the content.

For this **demo**, we asked ChatGPT-4 a question which it first answered by referencing open source knowledge. We then repeated the question and provided our knowledge sources for context. The answers we got back the second time were much more honed, and grounded by referencing expert knowledge. It also gives references to the sources it has used in its answer and suggests follow-up questions. AI models can also be configured to reference specific points within a document or video. Watch the demo video [here](#).



08 Using utility AI for your organization

8.3.1 Demo – making your knowledge findable

You can also introduce role-based prompting and ask ChatGPT to respond from different people's perspectives – such as a CEO or CTO. Note, the response also provides references to knowledge sources and suggests follow-up questions.

The screenshot shows the ChatGPT interface with four annotations:

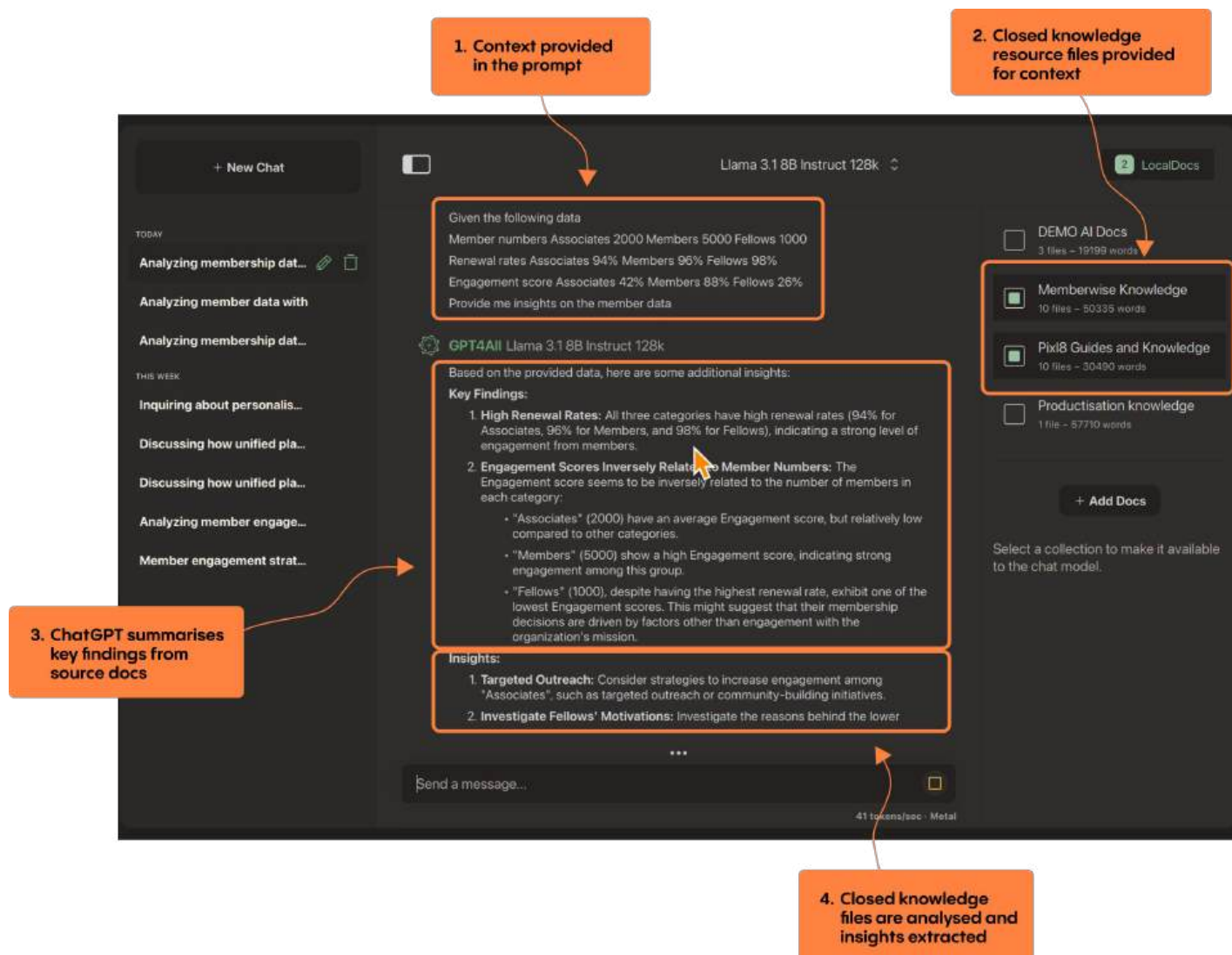
- 1. ChatGPT is asked to respond to prompt from the POV of a CEO and CTO**: An arrow points to the prompt "Now respond from the perspective of a CEO and CTO" in the chat input area.
- 2. ChatGPT still reference closed knowledge for context**: An arrow points to the "LocalDocs" sidebar on the right, which lists knowledge sources: "DEMO AI Docs" (3 files - 19199 words), "Memberwise Knowledge" (10 files - 50335 words), "Pixl8 Guides and Knowledge" (10 files - 30490 words), and "Productisation knowledge" (1 file - 57710 words).
- 3. Links to specific documents used to provide answer**: An arrow points to the "2 Sources" link below the chat response.
- 4. Follow-up questions suggested to continue learning**: An arrow points to the "Suggested follow-ups" section at the bottom of the chat area, which contains two questions: "How does a unified platform specifically enhance the capabilities of AI tools in an organization?" and "What are the specific cost savings associated with using a unified platform as opposed to multiple systems?"

08 Using utility AI for your organization

8.3.2 Demo – getting insights from your data

In this final demo, we show how we can achieve comparable performance to ChatGPT by using AI to get insights from data from a local language model. The model references both sets of documents, extracts information from them, and then analyzes it to produce insights. [Watch the demo here.](#)

There are many potential use cases for AI data analysis. For example, you could give AI your membership surveys and ask it to summarise findings, analyze sentiment and identify areas for improvement.



08 Using utility AI for your organization

8.4 – Are you ready for utility AI?

To take advantage of utility AI your organization needs to be ready by:

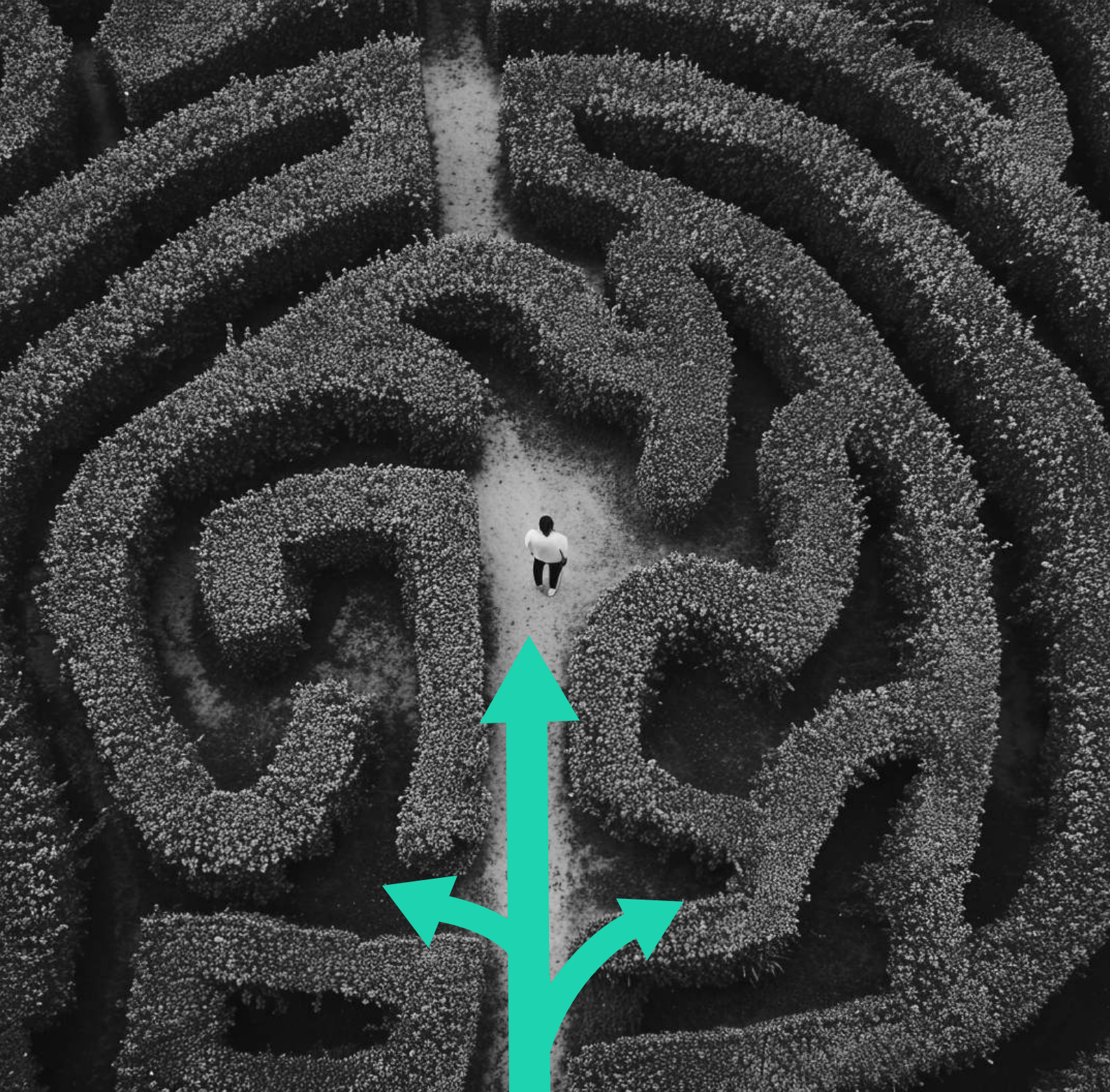
- Sorting your data so it is that it is of high quality and unified
- Having integrated technology
- Having a clear purpose for AI that is shared and understood by your team and your members
- Having up-to-date documentation and clearly written operating procedures and rules so that AI has the right context to learn

Are you ready for utility AI?

To use AI effectively for decision-making, clear, it's essential to have well-documented and clear rules. For example, if you want your AI to determine members' eligibility for a fellowship, it needs access to clearly defined guidelines. The clearer and more structured your processes, technology, and data, the more you can optimize and fully harness Utility AI's potential.



So what are the risks and challenges that you need to consider when adapting utility AI across your organization? We'll explore these next.



09 Business challenges and risks

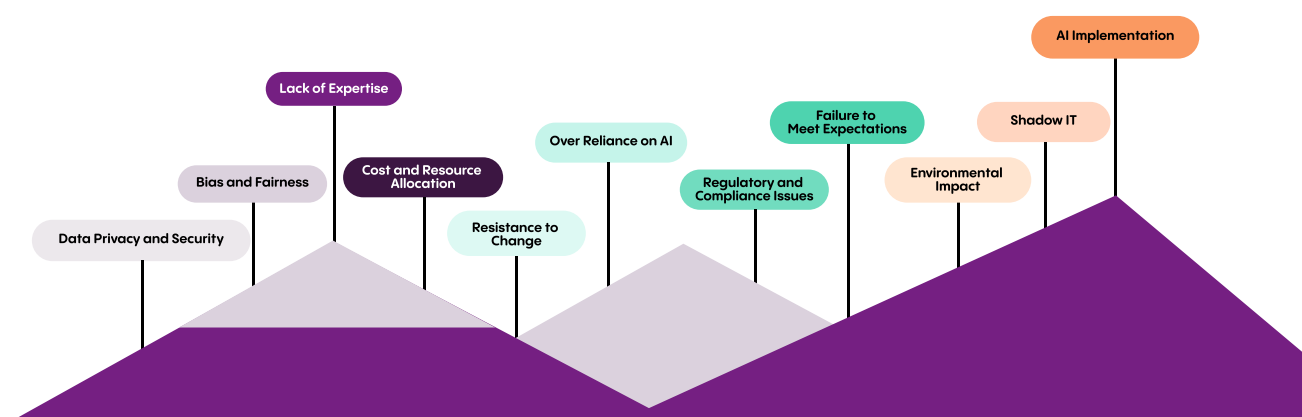
Implementing AI across your organization brings both significant opportunities and challenges, requiring new technology, skill sets, and a clear strategic purpose. See the essential steps to managing AI transformation to ensure a smooth transition and lasting success.

09 Business challenges and risks

9.1 Risks

Your members' trust is vital for your organization's reputation and effectiveness. To maintain it you need to be aware of the risks which come with implementing utility AI and address them in your implementation plan. This diagram lists the key risks and we expand on some of them below.

Navigating AI implementation risks



Data privacy & security: The first risk that probably comes to mind is the privacy and security of your members' data. This can be addressed by using models you download and run locally (e.g. GPT4All, Llama 3) which doesn't send your data to the cloud. Either way, you should be transparent with your members about how you plan to use their data, update your existing policies and have AI policies in place.

Shadow IT: This is when an organization takes a very prohibitive approach and restricts staff from using technology. People are likely to experiment with AI tools anyway - and might not do it safely.

For example, if you use the free standard individual edition of ChatGPT, the default behavior is to share your text data with OpenAI. You can disable this setting but you need to take action. On the ChatGPT team plan, however, the default position is that data sharing is closed.

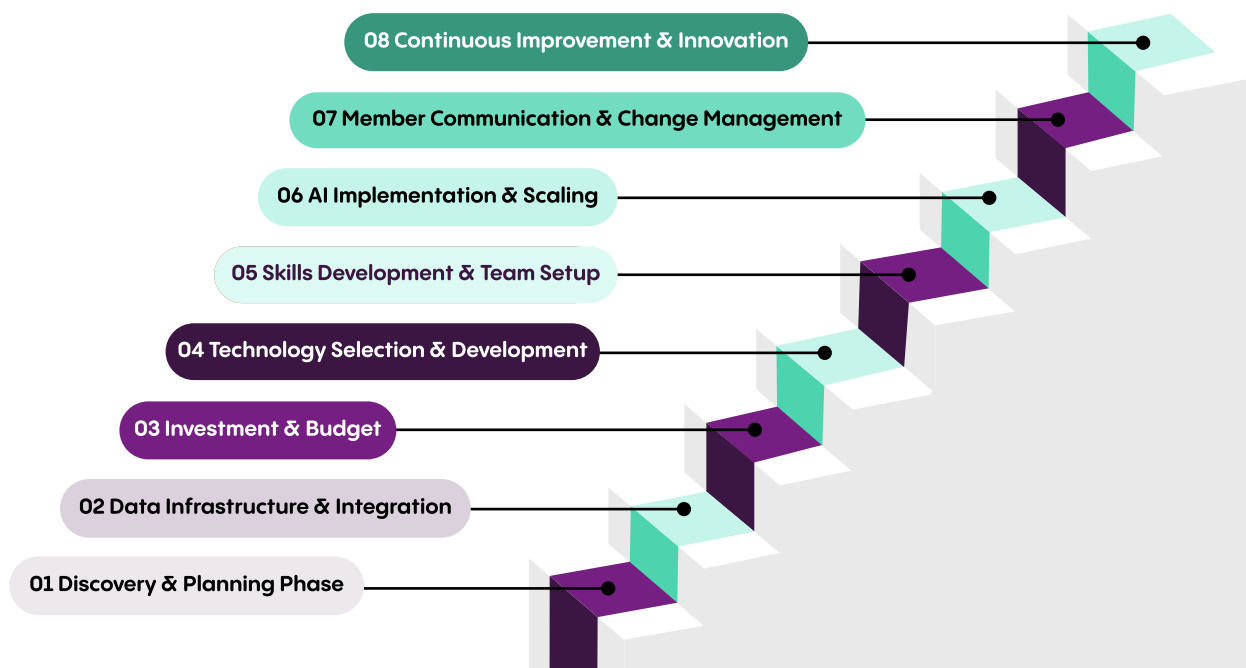
Environmental impact: You should also consider the environmental impact of using AI. As with other technology, running large language models uses a lot of energy. While big tech companies have pledged to use renewable energy, the starting position should be that your usage of AI is appropriate. Are you thinking of using a heavy large language model for tasks that don't need a language model?

09 Business challenges and risks

And finally doing nothing – or underinvesting AI is also a risk. AI is already here and evolving rapidly so you need to be clear about the role you want it to play and how it supports your long-term strategy.

9.2 Implementation plan

AI implementation plan



Change on this scale can be hugely disruptive. You need to onboard new technology and skill sets across your organization, review your processes and take your members with you on your journey. There needs to be a clear purpose or problem for the AI and a plan for how it will be used in each area of your organization. And of course, data needs to be optimized and technology integrated before you can begin.

We advise that you start small with low-risk use cases – such as providing knowledge summaries or tackling internal tasks such as evaluating which member enquiries need escalating.

09 Business challenges and risks

“

“Membership bodies should approach organizational AI transformation in the same way that they approached the change brought about by the pandemic. They need to move at pace and iterate – starting with things that are low risk.”

— Alex Skinner, Chief Executive, ReadyMembership

”

9.3 Skill sets

Hiring people with the right technical skills and experience in AI is challenging in an environment where AI is changing all the time. It certainly can't be left to one person – you will need a team to implement and manage your solution. Associations are already working with AI specialist consultancies including data scientists.

Who you need will depend on how hard the problem is that you are trying to solve, how valuable it is and the degree of accuracy you need your AI to produce.

We also advise talking to your current technology partner who should understand your tech and data. Good partners will be keeping up to date with the latest developments in AI.



09 Business challenges and risks

9.4 Budget

The budget you'll need to invest in AI depends on your goals and the starting point of your organization in terms of both technology and data maturity. For example, if your organization is already using platforms like Microsoft SharePoint, you can easily integrate AI tools like CoPilot to search your knowledge base, respect permission settings, and share information with your team. This is one of the most accessible and lower-cost options for getting started with AI.

On the other hand, if your organization relies on multiple siloed systems with data stored in different locations or outdated formats, you may need to invest more in data integration and technology upgrades before you can effectively use AI. In this scenario, implementing an AI solution will require a more complex and potentially costly approach.

You might need to first unify your data sources, invest in data cleaning, and potentially adopt new platforms that are AI-compatible. This additional investment will set the groundwork for AI to function effectively, but it will naturally be more resource-intensive compared to organizations that already have an integrated system in place.

By understanding your current tech infrastructure, you can better gauge what level of investment is needed to achieve your AI goals, whether it's a relatively low-cost integration or a more significant overhaul to prepare your systems and data for AI.

Keep in mind that the cost of member-facing AI solutions will be significantly higher than internal tools, as these require greater accuracy, security, and trustworthiness. However, there are also budget-friendly options to explore. Open-source AI models like GPT4All or Llama 3.0 can be run locally, offering a cost-effective starting point for developing AI capabilities while keeping your investment manageable.

In short, the investment in AI will vary widely based on your needs, but with careful planning, even a modest budget can unlock valuable AI-driven capabilities for your organization.



AI & READYMEMBERSHIP

For ReadyMembership users, we're exploring how AI can interact with the knowledge library to extract valuable information and deliver fast answers and recommendations. Because ReadyMembership is a unified platform with data all in one place, AI enablement is relatively straightforward.

See how our AI solution will work in chapter 10.

09 Business challenges and risks

9.5 Creating an AI-friendly culture

Building an AI-friendly culture is essential to support your AI transformation, and as with any big change, it begins with transparency. Keep your team informed every step of the way, explaining not just the "what" but also the "why" behind the changes. This helps alleviate concerns, encourages buy-in, and makes everyone feel part of the AI journey.

Encourage a mindset of curiosity and experimentation, where staff are empowered to explore how AI can enhance their roles. Provide training and resources to upskill your team, so they feel equipped and confident to work with AI tools. Equally, be open with your members about how AI will benefit them—whether through more personalized experiences or faster, smarter services.

A key part of creating an AI-friendly culture is embracing flexibility. AI will inevitably come with a few twists and turns, as it's a rapidly evolving technology. Be prepared to adapt, pivot, and learn as you go. Celebrate small wins, and don't be afraid to iterate on your strategy. Embrace the opportunities AI offers, and enjoy the excitement of navigating this unpredictable but rewarding journey.

By fostering open communication, encouraging experimentation, and cultivating a culture that's ready for change, your organization will be well-positioned to reap the benefits of AI while keeping your team and members engaged along the way.

9.6 Getting started

As with most things, preparation will put you in a strong position to start implementing AI. Start small and simple, with a clear purpose, and make sure to constantly communicate the changes and challenges to both your team and your members.



AI TIPS: CHECKLIST

- Have a clear business problem that needs solving – don't do AI for AI's sake
- Review your data (including knowledge) and make sure it is optimized
- Review your technology and ensure it is integrated
- Review your internal culture & processes
- Be brave, be excited! There's a lot of opportunity – AI can save you time and add great value for your members



10 A peek into the future of membership AI

AI is here and ReadyMembership is developing its own solution to support membership organizations. Get a first look into the future of membership AI.

10 A peek into the future of membership AI

At ReadyMembership, we're excited about the potential of utility AI to solve common pain points faced by membership organizations—one of the biggest being the challenge of helping members find information quickly and easily.

In many cases, internal experts with limited capacity become bottlenecks, wasting valuable time and expertise answering the same questions repeatedly. In addition, traditional search tools often rely on members knowing exactly what they're looking for, which if they don't can be frustrating and time-consuming.

Our AI solution is designed to overcome these challenges. Unlike a traditional chatbot, our AI goes deeper, offering accurate, context-driven responses and even suggesting next steps based on the member's needs. It not only answers specific questions but also provides solutions to problems, making it far more advanced in its depth, range, and reliability.

Our first prototype is aimed at supporting internal staff, allowing us to test the technology in a lower-risk environment and let the AI learn from real interactions. This AI taps into the organization's knowledge library, enabling staff to have a conversation with the AI to quickly get accurate, reliable answers.

This will help reduce the burden on experts, free them up for more strategic tasks, and ultimately improve the experience for both staff and members.

10 A peek into the future of membership AI

Our AI-enabled membership platform

Here's how our AI solution can benefit your organization:

More than an AI chatbot

This isn't just another AI search engine—our AI generates original content, delivers valuable membership insights, and provides actionable recommendations tailored to your organization's needs.

Grounded in your knowledge

Unlike typical AI tools, our AI goes beyond text. It understands bar charts, graphs, data tables, images, and videos, ensuring every piece of your organization's knowledge is leveraged.

Fast, insightful answers

With automatic focus on relevant knowledge, users get effective, accurate responses to their questions—quickly and confidently.

Intelligent content ingestion

Our flexible solutions adapt to your knowledge repository, allowing for model tuning, content swaps, or integration with new ingestion technologies.

Enhanced user questions

Benefit from transparent prompting logic that tailors responses based on the user's role and context, delivering more precise and relevant answers.

Easily check sources

Directly access the chapters, paragraphs, charts, or video time codes behind every answer, ensuring transparency and trust.

Suggested follow-up questions

Keep members engaged with prompts for deeper exploration, guiding them on their membership journey and uncovering further insights.

User-centred feedback

Empower users to rate answers, enabling continuous improvement by investigating and refining any unsatisfactory responses.



11 Conclusion & next steps

The possibilities for utilizing utility AI across your organization are exciting! Once you have carefully considered the opportunities, risks and implementation plan for your organization where should you start? Here are your next steps.

11 Conclusion & next steps

Now that we've explored the key areas of AI and how it can benefit membership organizations, let's look at what comes next. AI isn't just a futuristic idea anymore—it's already changing the way we operate, engage with members, and make the most of our data.

The insights from this guide have shown how AI can bring about meaningful change, and the next steps you take will be crucial in shaping how your organization adopts and thrives with this technology.

1 Start small and simple

Kick things off with internal AI solutions that carry less risk. For example, use AI to help staff answer member queries faster or to automate repetitive tasks. This will give your organization time to adapt and learn as AI becomes more integrated into your processes.

2 Assess your data and technology maturity

Take a good look at your data systems—are they clean, integrated, and ready for AI? If not, this is the time to invest in tools that can unify and curate your data before rolling out AI on a larger scale.

3 Create a cross-functional AI task force

Bring together a team of stakeholders from different departments to lead AI adoption. This team will be key to driving AI initiatives, managing the change process, and ensuring AI aligns with your organization's overall goals.

11 Conclusion & next steps

4 Pilot AI projects

Start with low-risk pilot projects to test AI tools and see what impact they can have. For example, you could deploy an AI tool to help staff respond to member queries—this will give you real-world insights into how AI could work on a larger scale.

5 Engage and train your team

Help your staff understand the benefits of AI and how it will improve their work. Foster a culture of experimentation where team members feel empowered to try out AI tools and suggest new applications that could benefit the organization.

6 Monitor and adjust

AI is always evolving, so your strategy should too. Regularly review how AI is performing, make adjustments as needed, and stay on top of the latest AI developments to ensure continued success.

11 Conclusion & next steps

Final Thoughts:

Most membership organizations are still in the early stages of exploring AI—carefully assessing its potential, weighing the risks, and considering how to get real value from their investment.

It's natural to feel cautious about taking the first steps, especially with concerns about making the wrong choice or being left behind. But AI offers exciting opportunities, and with the right approach, it can deliver genuine value for your organization.

Remember, AI is a journey—not a one-time solution. It's about starting small, learning from your experiences, and scaling up as your confidence and understanding grow.

The future of AI holds immense potential, and by taking thoughtful, measured steps, your organization can gradually unlock its full benefits. This approach ensures that you'll be ready to implement AI in ways that truly enhance member value and keep your organization ahead of the curve.

By focusing on the key areas discussed in this guide—understanding AI, preparing your data, and setting clear goals—you've already begun laying the groundwork for embracing AI effectively. And if you're unsure about where to start, you're not alone!

The team at ReadyMembership are here to help. We're passionate about AI and excited to work with you to explore solutions tailored to your organization's unique needs. Let us guide you through the possibilities so you can make informed, impactful decisions that will future-proof your organization and deliver long-term value to your members.

Your unified membership experience platform.

A Pixl8 Group product, our unified data approach enables you to drive unparalleled hyper-personalisation and seamlessly manage and deliver impactful, valuable member experiences.

ReadyMembership is designed to be right-sized for you, meaning the platform is adaptable for your changing needs and ambitions.

You keep evolving, so do we.

Explore all the features of ReadyMembership [here](#).





ReadyMembership

Get in touch

#joinourevolution

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