

MemberWise Webcast

Tuesday 4th July 2023



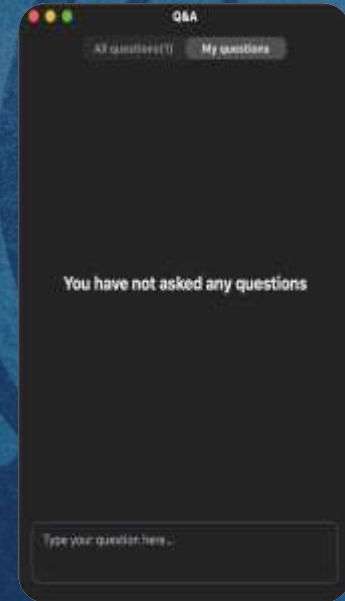
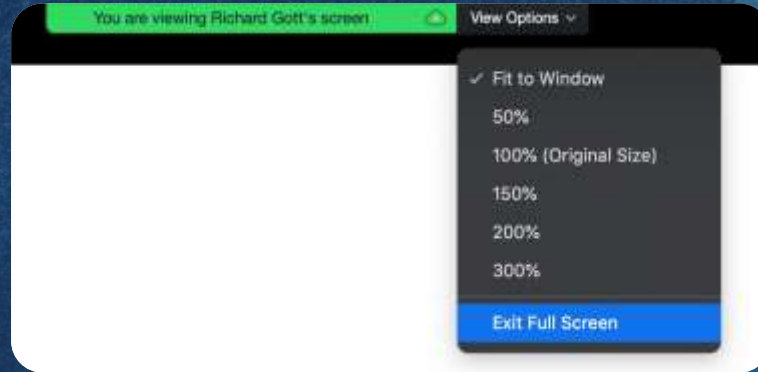
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MEMX 2023 Launches today – www.membershipexcellence.com

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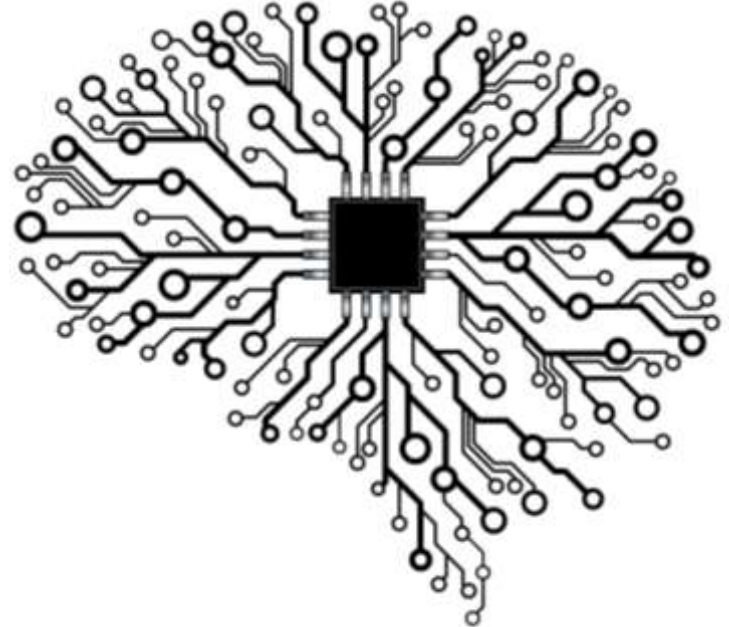
Membership on Steroids?



MemberWise

*A Clear View of Artificial Intelligence (AI)
and Its Likely Impact on the Future of Membership*

Presented by Richard Gott
Founder & Chair, MemberWise Network



A Brief Health Warning

- This is a constantly evolving topic / Content going out of date quickly
- AI is here within Membership and is not going to go away
- Our role (MemberWise) is to inform / share / Consider what is possible (now & in the future)
- Debating whether it will play a role (in my opinion) is now over
- Let's get stuck into some solid contextualised AI / Membership Content
- Later we will speak to Alan about his work at the IMechE + Questions

Today's Participants

- Richard Gott, Chair, MemberWise Network
- Alan King, Head of Global Strategy and AI, Institution of Mechanical Engineers (IMechE)
- Kerrie Fuller, Associate Director (Engagement), MemberWise Network

Structure

- Presentation from Me
- Q&A / Insight with Kerrie & Alan

Let's kick off with a quick poll..

Start from the Beginning

A Sector Specific Definition:

“Artificial intelligence (AI) is the building, development & usage of smart machines/programmes capable of performing back office or member facing (online and offline) tasks that traditionally have required members of staff (humans) to action.”

(MemberWise / July 2023)

- Not to be confused with automation. I.e. specific instructions leading to specific and/or repeated tasks
- Most AI outputs at present are mostly evidence/prediction based (at present). E.g. Asking a question to ChatGPT - ‘How far is it from the Earth to the Moon? / How many humans are there on Earth?’
- A lull in development/roll out between 2017 and 2022 due to Google holding back its technology due to potential reputation worries. OpenAI / ChatGPT (key shareholder: Microsoft) launched in November 2022 propelled what you are seeing now... #business

4 Key Types of Artificial Intelligence

1. Reactive Machine Learning (**NOW**) - E.g. NETFLIX recommendations
2. Limited Memory / Deep Learning (**NOW**) - Gets smarter when more data received - E.g., self driving cars / translation tools / Credit Risk Assessments
3. Theory of mind (**FUTURE**) - self awareness / understand the World & intentions to predict behaviour and take action (similar to human behaviour but... on steroids)
4. Self Awareness (**FUTURE**) - a conscious understanding of existence - a way off & quite scary!

A Selection of Breaking AI News Items (w/c 3rd July 2023)

- OpenAI (owner of Chat GPT) announced the opening of its first Office outside of the US in London
- Today Universities are drawing up guiding principles to ensure staff and students are AI Literate
- Goldman Sachs has estimated 2/3rds of US jobs will be exposed to automation (due to AI) & 25% of these jobs are likely to see workload halve
- Only 27% of companies have policies and processes needed to fully harness AI (Deloitte)
- This week AI is enhancing commentary/evaluate player performance at Wimbledon ([with IBM](#))
- GPT4 has simple reasoning with an IQ range of 80-90



The Link to Membership / Associations & Potential

- We play a crucial role in various industries, bringing professionals together to collaborate and advance in our members respective fields/areas of interest.
- We provide robust tools & resources, networking opportunities, and educational programs.
- Traditionally we can be quite bureaucratic and have worked hard to take our offerings online particularly post-COVID
- Integrating AI will be a game changer (on the inside & outside). We just need to be informed and ready. We can help with that.
- However, integrating systems, creating data lakes & ensuring data is clean is our first stop. More on this in a minute...



The Link to Membership / Associations & Potential

- AI has the potential to help us scale up, deepen and amplify our work (with a health warning).
- Think - Small Data v Big Data
 - 50 doctors sharing their patient results/research on a topic at a conference
 - 100 Million doctors sharing live results fed into a centralised system using AI to collate/compare/contrast/analyse
 - The ability also to see information more closely than the human eye
- In our World (Membership). We have some thoughts, observations and ideas coming up. First up some examples of AI and related tools/plugin...

Examples of AI Solutions ‘Out There’

Solution Types

- Generative/Conversational AI - OpenAI (ChatGPT 4) / Dall-e 2 / Google AI / GitHub / Harmon AI / Runway
- Examples of functions - Virtual Assistant / Facial recognition / Chatbots / Translation Tools /text to image
- AI for CRM/AMS (data focused) - Salesforce Einstein & AI / Microsoft Azure AI / Power BI (Microsoft) / Dynamics 365 Copilot

Examples

- Looka - create logos/branding
- Murf - generate voiceovers from text via 100 voices speaking 15 languages
- Deep Nostalgia - bringing photos to life
- Legal Robot - simplifies legal documents/language



I will give you some membership related AI Prompts at the end of this presentation as a “take-away” to get you started (see after recommendations)

Reasoning – This is that bit that needs to improve & it is...

Question:

“I want all the rooms in my house to be white. At present there are some blue rooms, some yellow rooms and some white rooms. Yellow paint fades to white in a year. What shall I do if I want all of the rooms to be white in two years time?”

Answer:

“Paint the Blue Rooms Yellow”

This is not the logical/lateral response. Reasoning is getting better...



ChatGPT 4

Impact on Member Insight / Online Member Experience

On the inside

- AI can analyse member data to uncover patterns / preferences / engagement trends. This will help us with retention/engagement and reduce lapsing/attrition by optimising/personalising member experiences and tailoring content to individual needs (going way beyond segmentation)
- This information can inform associations to develop more targeted marketing strategies/campaigns and create more valuable/relevant member experiences/likely cross and upsell of content/services/products.
- We are starting to see new business critical solutions and existing solutions incorporate AI & this should lead to great efficiencies also.

On the outside

- Chatbots can serve up relevant content and answer questions fast – More work needed here
- Amazon style relevant content can be served up via the web and email (beyond current automation rules)
- On the phone - AI software is now available to gauge caller tone of voice to alert call handlers to enhance empathy levels (Cogito) – something for the medium/larger organisations to consider
- However, solid/trusted data needs to be present and in the right place(s) – We know this is not yet so.

Member Data – Possibly a “Sticking Point / Blocker”

- AI enables associations to make data-driven decisions by analysing large volumes of information.
- Predictive analytics and machine learning algorithms can uncover valuable insights to guide strategic planning and resource allocation.
- “Rubbish Data In – Rubbish Data Out”
- Traditionally we have had too much data. It has been in silos which has & will held us back. Think ‘Data Lakes’ & a time to clean up / take a more structured approach
- Provided tools can access this data and it is accurate the possibilities are mind blowing. Membership on Steroids...



Automation of Administrative Tasks (On the Inside)

- AI can automate repetitive administrative tasks, freeing up staff time and improving operational efficiency.
- Chatbots and virtual assistants can handle member inquiries, event registration, and other routine processes.
- No trends linked to workforce reduction and AI, however there is a shift to less higher paid roles with more technical skill/responsibility. E.g. Online Community Managers, Ux Development/QA
- More on the roles that will stay and go in a minute...



AI & Enhanced Member Services

- **Magazines, Journals & newsletters** - Should all be online / Issues are likely to be able to write themselves if solid input and QA – Publishers beware! Each member may well receive a different version depending on their preferences/interests. (E.g. Jasper / ChatGPT)
- **Funding Bids** – ChatGPT parameters to shorten the write up exercise.
- **Learning Management Systems** - AI-powered learning platforms can & will deliver personalised educational content and adaptive learning experiences. Intelligent tutoring systems can provide tailored guidance and support members. A bonus for Student Members without all that effort/time/resource!
- **Conferences & Events** - AI can analyse content within existing courses, conference presentations, transcripts, journal articles. One step further to gain understanding of sentiment linked to participant feedback and/or online/in-app chat during sessions to create new content. AI technologies can enhance virtual events and conferences by offering personalised agendas, matchmaking, and interactive experiences

AI & Enhancing Your Competitive Edge

- **Sponsorship/Revenue Generation** - AI could be used to match sponsors with members likely to be interested in purchasing their products/services
- **Lead Generation** - In turn the above could be targeted at members that have behaved/responded/attended/purchased products/services of a similar nature.
- **Examinations** - Generate assessment questions v cheat opportunity for members! Worth taking a look at the [JCQ Guidance on protecting integrity of exams](#)
- **Targeted pairing & networking** - AI technologies could facilitate collaboration and knowledge sharing among association members. E.g. Matching members with the same interests rather than relying on membership of a Special Interest Groups.
- **Responding to Member Enquiries/Complaints** – Using Generative AI tools (like ChatGPT) will speed up the process & perhaps extend customer service provision
- **Membership Surveys/Research** - You may only need to QA the questions rather than write them and/or use a dedicated market research agency

What is or will hold us back...

- A lack of understanding of 'what is possible'. We can help.
- Existing suppliers not adopting these new AI technologies quick enough or at all
- The bureaucratic nature of change within some membership bodies
- Our lack of focus on structured data and related strategies
- Concerns regarding copyright (re: Generative AI results/output)
- I am not convinced we will see a seismic move linked to event/F2F delivery in the short term
- People like people / Content is King = If the content is right. They will come



Ethical Considerations



- The term “Responsible AI” (Beneficial for Society / Not be used inappropriately)
- Concerns if in the wrong hands it could be a bad thing
 - US Election Rigging – You cant ‘unsee’ content you have seen - #subconscious
 - A worry that it could replace entire professions / industries
- Risk of plagiarism with online exams (eye movement technology)
- IBM Approach – Closed AI systems specific to businesses/customer requirements. E.g. Pharmaceutical Algorithms

Ethical Considerations

- Associations should ensure transparency, fairness, and accountability in AI algorithms and data privacy practices. E.g. Inclusion in Data Protection Policies/Privacy Statements
- Consider the likelihood of bias in data sets used or data errors. E.g. survey results from committee members. Not the real world.



Cyber Security & Privacy

- Associations must prioritise cybersecurity and data privacy when adopting AI technologies.
- Robust security measures and strict data protection/GDPR protocols should be implemented to safeguard member information.
- Suppliers integrating AI into their new and existing solutions should incorporate member opt out functionality for admins to action in the back office of tools or members to self-serve at the front end (similar to third party or product/service opt-outs)



Skills & Workforce Transformation

- The rise of AI will require associations to adapt their workforces and develop new skill/competency sets.
- Associations can play a vital role in providing AI-related training and education to help their members navigate the changing landscape also. I.e. Bring them with you.
- Likely to reduce – Basic HR / Finance / Operations / Logistical roles / Possibly Developer Roles (slightly controversial!)
- Likely to increase – Technical Membership / Sales / Marketing / Digital roles



Association AI Usage NOW

- Chatbots - 5% using them – We need more sophisticated software though
- A couple of Institute's are using AI to predict likely member attrition without intervention and those at risk are being targeted via member engagement marketing campaigns
- ChatGPT/AI Prompt usage - Many of us are doing this now/testing for responses but we need to be more specific with our requests. E.g. See our MemberWise Connect discussion on this.
- One interesting exercise is to enter assessment/examination questions into the likes of Chat GPT to see if they are answered correctly. E.g. for one Institute 8 out of 10 questions were answered correctly.
- AI generated key word search/suggestion suggestions within LMS (beta)
- Large blue-chip companies are investing. One's doing so from initiative to initiative are seeing less return than via organisation wide approaches (only 4-5% can quantify benefit)

12 Key Recommendations to Get You Started

1. Consider key member (and internal) requirements and where AI can optimise experience (and operations)
2. Ensure you are clear on related goals:
 - We want to create more targeted and personalised content
 - We want to reduce member response times by 30%
 - We want to increase engagement by 20% and reduce member attrition by 10%
3. Create an initial AI Use Business Case to get things off the ground
4. Consider creating a working group on the topic straddling departments/functions or add as a standing agenda item for cross organisation working groups
5. Consider integration requirements with internal systems and processes
6. Proposed AI related activity should then feature in Data Strategies, Digital Strategies and Member Engagement Strategies (and ideally refer back to an AI Strategy/Plan once in place)
7. Pilot AI usage in one area of the business to showcase success to internal stakeholders

Recommendations

8. Consider the risks involved (Risk Register / Update Policies & Procedures)
9. Your current suppliers – Query their AI related plans linked to their product roadmaps & how related risks are going to be mitigated. E.g. online assessment solution vulnerability
10. If concerns in a particular area – test the hell out of scenarios. E.g. Input 10 exam questions in to GPT4 and see what response comes back.
11. Pilot functionality with your advocate members so they can see the benefits
12. Test, test and test again once member facing AI opportunities/functionalities are available

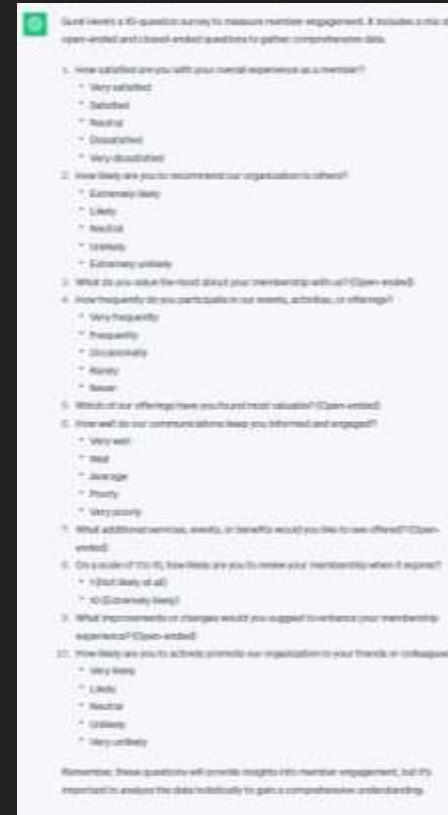
Now for some Generative AI Prompts for you to try out...

Examples of Association Specific AI Prompts (Generative AI)

Creating a Membership Survey

ENTER:

“My goal is to understand how engaged all of our members actually are. Write me a 10 question survey that will find out exactly how engaged they are. Questions should be open and closed. I don’t want to use net promoter score.”



Send them a 10-question survey to measure member engagement. It includes a mix of open-ended and closed-ended questions to gather comprehensive data.

1. How satisfied are you with your overall experience as a member?
 - Very satisfied
 - Satisfied
 - Neutral
 - Dissatisfied
 - Very dissatisfied
2. How likely are you to recommend our organization to others?
 - Extremely likely
 - Likely
 - Neutral
 - Unlikely
 - Extremely unlikely
3. What do you like best about your membership with us? (Open-ended)
4. How frequently do you participate in our events, activities, or offerings?
 - Very frequently
 - Frequently
 - Occasionally
 - Rarely
 - Never
5. Which of our offerings have you found most valuable? (Open-ended)
6. How well do our communications keep you informed and engaged?
 - Very well
 - Well
 - Average
 - Poorly
 - Very poorly
7. What additional services, events, or benefits would you like to see offered? (Open-ended)
8. On a scale of (1) to (5), how likely are you to renew your membership when it expires?
 - 1 (Not likely at all)
 - 5 (Extremely likely)
9. What improvements or changes would you suggest to enhance your membership experience? (Open-ended)
10. How likely are you to actively promote our organization to your friends or colleagues?
 - Very likely
 - Likely
 - Neutral
 - Unlikely
 - Very unlikely

Remember: These questions will provide insights into member engagement, but it's important to analyze the data individually to gain a comprehensive understanding.

Examples of Association Specific AI Prompts (Generative AI)

Ideas for Marketing Membership to Young healthcare professionals

"Create a list of 10 creative content suggestions for social media posts aimed at boosting membership among young healthcare professionals in the association. Emphasize the benefits of ongoing education, CPD, and other compelling incentives."

(Prompt inspired by BlueSky eLearn)

1. **Infographic:** Share an eye-catching infographic highlighting the top reasons why ongoing education and CPD are crucial for career growth in the healthcare field. Include statistics and success stories from members who have benefited from these opportunities.
2. **Success Stories:** Feature real-life success stories of young healthcare professionals who have advanced their careers and achieved personal growth through the association's educational programs and CPD offerings. Highlight specific achievements and the impact on their professional lives.
3. **Testimonials:** Publish short video testimonials or written quotes from current association members, emphasizing how ongoing education and CPD have helped them stay ahead in their field and opened doors to new opportunities.
4. **Webinar Previews:** Tease upcoming webinars or online training sessions by posting short video clips or sneak peeks of the valuable content that members can expect. Highlight the relevance, practicality, and industry-leading experts involved.
5. **Q&A Sessions:** Conduct live Q&A sessions on social media platforms, featuring industry experts or renowned professionals who can answer questions related to ongoing education, CPD, and the association's resources. Encourage engagement by soliciting questions from young healthcare professionals.
6. **E-Books or Guides:** Create downloadable e-books or guides that offer in-depth insights into emerging trends, new technologies, or specialized areas of healthcare. Showcase the association's expertise and the value it provides to members seeking knowledge expansion.
7. **Member Spotlights:** Showcase outstanding achievements of young healthcare professionals who are association members through engaging posts, interviews, or videos. Highlight their career progression, recognition, and the role the association played in their success.
8. **Virtual Conferences:** Promote upcoming virtual conferences or events with a focus on engaging young healthcare professionals. Highlight keynote speakers, interactive sessions, networking opportunities, and the chance to earn CPD credits.
9. **Exclusive Resources:** Offer a preview or limited-time access to exclusive educational resources, research papers, or industry reports available only to association members. Create a sense of exclusivity and demonstrate the association's commitment to staying at the forefront of healthcare knowledge.
10. **Social Media Contests:** Organize contests or challenges that encourage young healthcare professionals to showcase their expertise or share their experiences related to ongoing education or CPD. Offer prizes such as discounted membership, free access to educational materials, or mentorship opportunities.

Remember to tailor the content to suit each social media platform and engage with the audience through comments, likes, and shares to foster a sense of community and encourage participation.

Further Examples of Association Specific AI Prompts (Generative AI)

- Save time generating reports – “Summarise the key points in our AGM Minutes”
- “ “ writing press-releases – “Write a press release on the launch of our new technology conference”
- “ “ proposals – “Write a submission for a funding grant for a more sustainable association”
- “ “ writing policies – “Write a policy focused on member facing staff adherence to data protection legislation”
- “ “ proof reading – “Proof read this document for spelling errors and grammatical errors”
- “ “ responding to specific customer complaint letters – “Respond to this customer complaint appropriately and ensure the tone is sympathetic”



Thank You for Listening.



Over to Alan & Kerrie to discuss what the Institution of Mechanical Engineers (IMechE) is doing on this topic...

