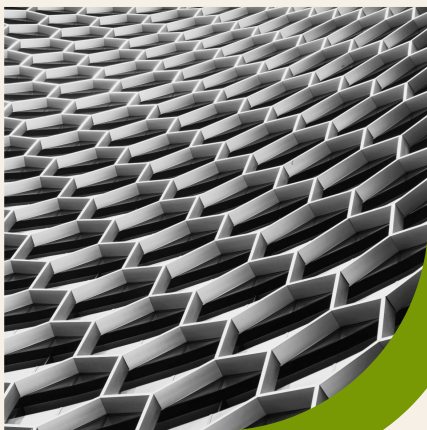# PIXL8GROUP

From Documents to Decisions – How AI is Transforming Membership Knowledge

Today's AI focus – what we'll cover

- Why AI-powered knowledge is the biggest opportunity in membership
- The limitations of traditional search and manual processes
- What AI can and can't do in knowledge retrieval
- Sneak peek: How ReadyMembership AI is changing knowledge access
- Lessons from early implementation—what works and what doesn't

About Pixl8

Founded in 2001

200+ membership clients

Privately owned and managed
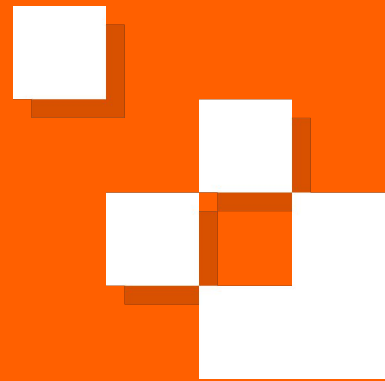
Client led roadmap

Pixl8MX

ReadyMembership

EventFolio

The specialist technology partner of choice for professional membership bodies, associations, chamber of commerce, charities and trade bodies.

The membership AI challenge – why knowledge is key

The membership AI challenge – why knowledge is key

- Knowledge is the heart of your membership value proposition
- Membership organisations produce vast amounts of knowledge across multiple formats
- This knowledge is often difficult to access, requiring manual searching or expert intervention
- The challenge of evolving terminology and classifications
- The balance between personalisation and privacy

Poll question 1:

How long does it typically take for a member to find key information?

Single choice poll

- Instantly – Less than 1 minute
- A few minutes – 2-5 minutes
- A while – 5-10 minutes
- Too long – More than 10 minutes
- We don't know – No tracking in place

Your knowledge

Essential CRM data

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

change to '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 Behaviour Data

Login Frequency, Pages Visited, Time Spent on Website, Downloads (whitepapers, reports), Search Queries, Content Interactions (blog posts, e-newsletters), Social Media Engagement

Your knowledge

Rich CRM data ...

Professional Development and Learning Data

CPD points/credits, Course Enrolled or Completed, Skills and Certifications Earned, Professional Goals and Interests

Feedback and Satisfaction Data

Member Surveys, Net Promoter Score (NPS), Complaints or Issues Raised, Satisfaction Scores (events, courses)

Advocacy and Influence Data

Petitions Signed, Lobbying or Advocacy Involvement, Policy Submissions, Campaign Contributions

Referral and Recruitment Data

Member Referral Programmes, 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

But more likely…

Your knowledge

Everything else...

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**	**Personalised Member Communications**

Poll question 2:

How does your team currently handle member knowledge access?

✅ *Multiple-choice poll (select all that apply)*

- We have a structured knowledge base that members can search
- Members rely on staff to answer their questions
- Members frequently submit support tickets/emails for help
- We provide FAQs, but members still struggle to find answers
- We don't have a clear system in place

Poll question 3:

What is the biggest challenge with your organisation's current search and knowledge system?

✅ *Multiple-choice poll (select all that apply)*

- Information is hard to find or buried in documents
- Members get inconsistent answers depending on who they ask
- We have a limited number of experts which can create bottlenecks
- Search results are too broad or irrelevant
- Search doesn't understand complex queries
- We don't track search effectiveness, so we don't know

?

Search vs findability

Traditional non-semantic search

- Relies on keywords
- Returns too many or irrelevant results
- Often struggles with interpreting complex documents
- No semantic support
- Time-consuming for staff and members

AI-powered knowledge retrieval

- Understands natural language & intent
- Provides direct, accurate answers
- Can process multiple formats
- Models in constant state of improvement
- Recognises terminology changes over time
- Saves time for members and staff
- Quick, context-driven results

Knowledge navigation

Understands structured content
(FAQs, articles, policies)

Finds answers based on meaning, not just keywords

Can process multiple formats –
text, transcripts, structured data

Learns and adapts –
recognises changes in terminology over time

Saves staff time by automating repetitive knowledge retrieval

Improves consistency –
provides the same answer across teams

Works at scale –
handles large datasets quickly

Struggles with complex data tables
(e.g., financial reports)

Requires well-structured data –
messy or outdated content affects accuracy

Cannot always interpret context correctly –
may need human oversight

Limited ability to manage evolving classifications without updates

Not a replacement for human expertise –
supports decision-making, doesn't replace it

AI-generated responses need validation –
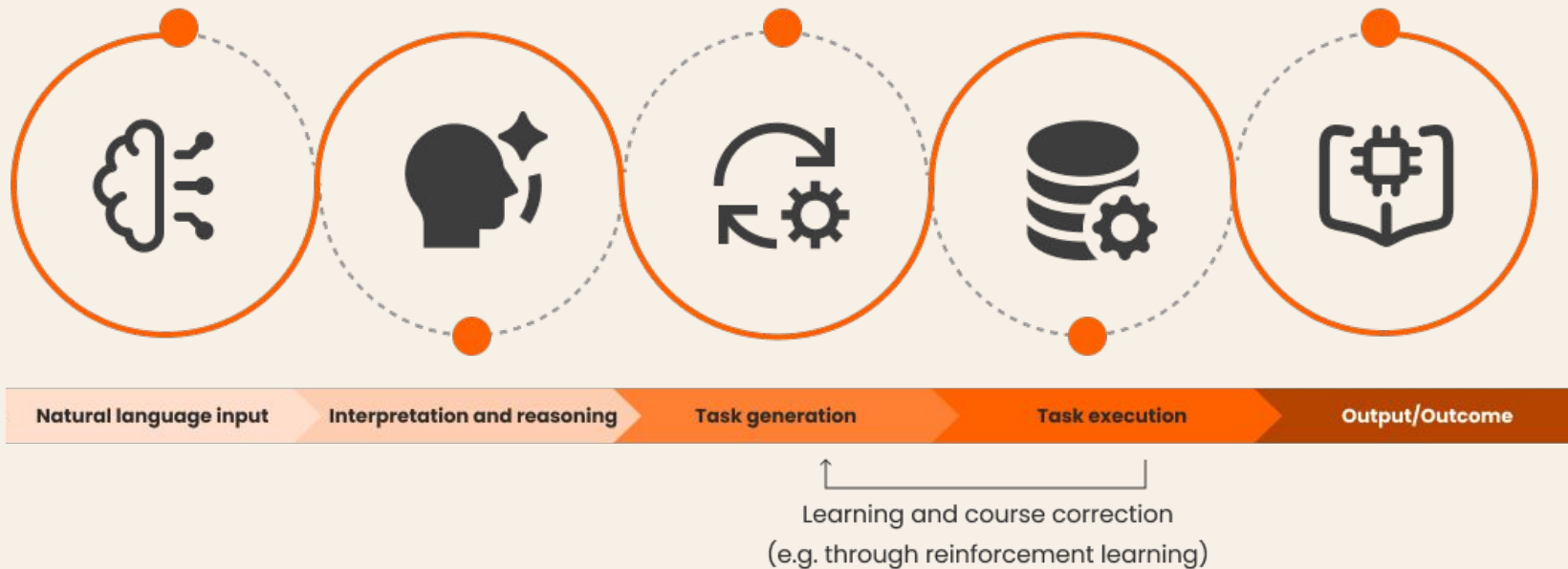incorrect answers can occur

Potential privacy risks – requires clear rules for
handling personal or sensitive data

Agentic AI simplified

Human intervention/review can happen at multiple points, as needed or deemed necessary

| Natural language input | Interpretation and reasoning | Task generation | Task execution | Output/Outcome |

Learning and course correction
(e.g. through reinforcement learning)

Agentic AI applies reasoning to determine **what's the most meaningful response** rather than just presenting everything available.

Poll question 4:

## What are your biggest concerns when it comes to AI and data privacy?

Single choice poll

- AI accidentally exposing personally identifiable information (PII)
- AI providing inaccurate or misleading answers
- Lack of control over what data AI accesses
- AI relying on external sources that may not be secure
- We don't know enough about AI privacy risks to say
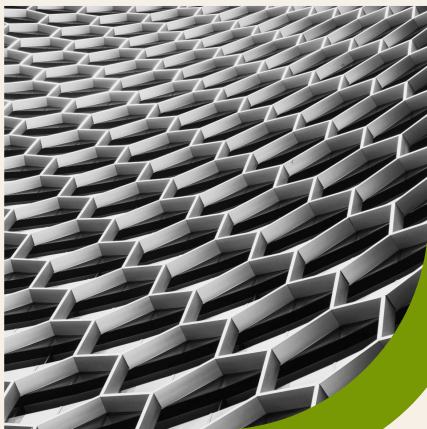
AI and Privacy – Protecting Member Data

- Why Privacy Matters in Membership AI
    - Members expect secure, responsible data handling.
    - AI must enhance services without exposing sensitive data.
    - Trust and compliance impact engagement and retention.
- What AI in Membership Needs to Protect:
    - Personally Identifiable Information (PII) → Names, contact details, financial records.
    - Member Data → Membership status, renewal history, CPD tracking.
    - Regulatory & Policy Information → AI must pull from trusted internal sources to ensure accuracy.
- Closed vs Open AI Models – Which is Safer?
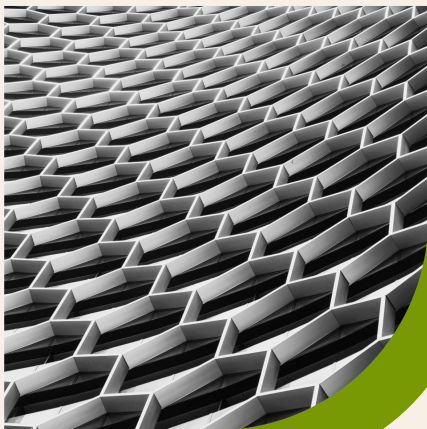
AI and Privacy – Protecting Member Data

- AI Data Access Controls
  - AI should only retrieve information from verified sources—not open web searches.
  - Membership organisations must define access permissions for AI tools.
  - Staff oversight ensures that AI-generated responses align with governance policies.
  - Regulatory Compliance – Aligning AI with GDPR & Data Policies
- AI must follow GDPR regulations—ensuring member data is not stored, exposed, or misused.
- Anonymising sensitive data before AI processes it.
- Restricting external integrations that could expose internal knowledge.
- Allowing human review of AI-generated responses for sensitive queries.
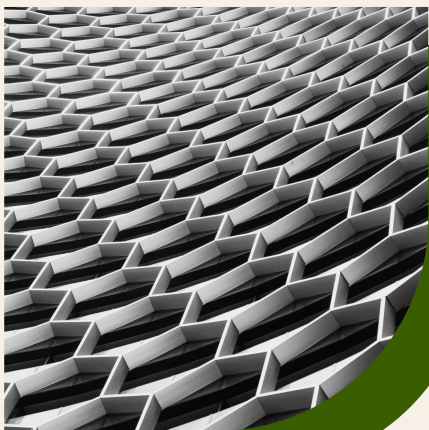
In summary

- **Your content structure and sources are crucial** – AI works best with well-organised data
- **Terminology changes must be accounted for** – AI needs updating to stay accurate
- **AI should enhance, not replace, human expertise** – AI supports decision-making, not replaces staff
- **Data security and accountability matter** – AI must be transparent in its data sources and processing

ReadyMembership AI in action

Timeline

Available as a module in ReadyMembership or standalone April 2025
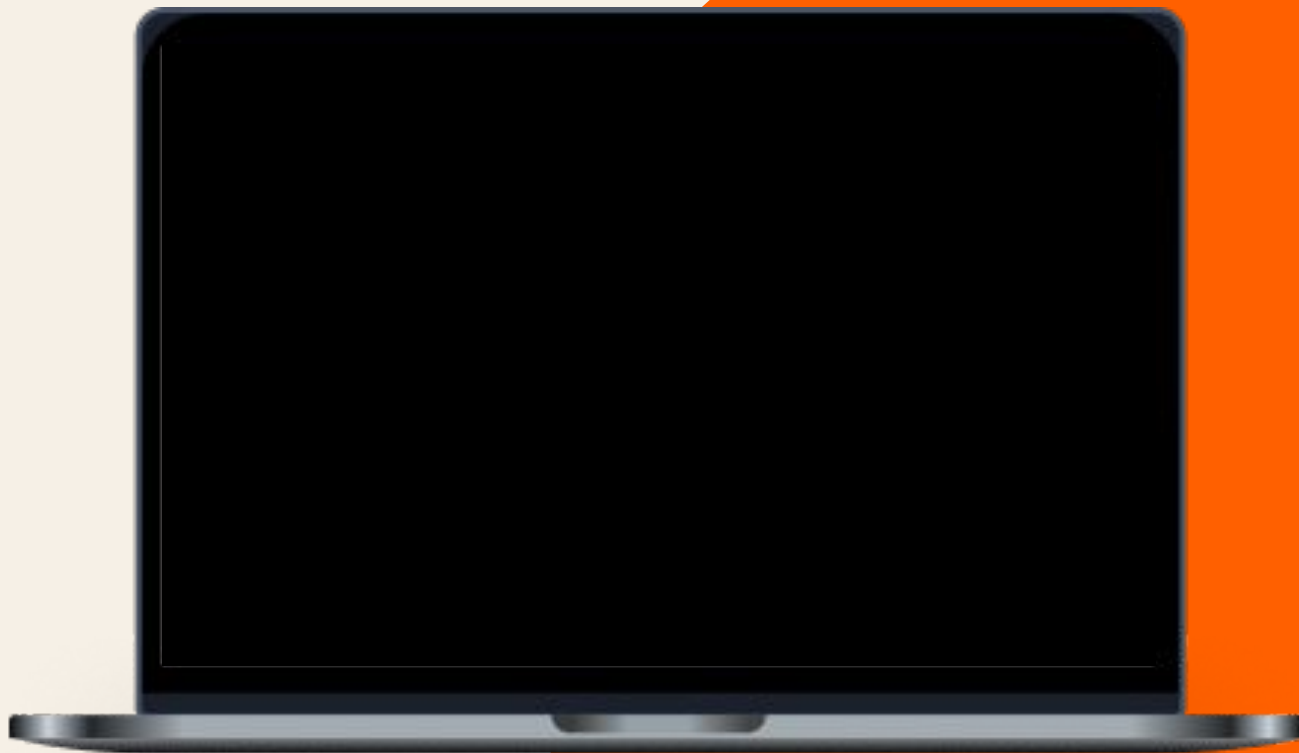
Early adopters are using it now

Further suite of products launching May 2025

Next steps and Q&A

- We'll send you our AI Guide
- Upcoming ReadyMembership AI launch at MemberWise
- Opportunities to be part of early AI testing, register your interest!