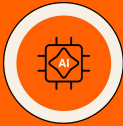


The MemberWise Webcast

Harnessing AI: Practical Insights and Actionable Steps
for Your Membership Organisation

In Partnership with:

 **PIXL8GROUP**



Agenda

- AI or not AI, that is the question?
- Where are we with AI now? (Individual vs Utility AI)
- The art of the possible – what we can do now (demos)
- Getting your data ready
- Utility AI – from assistance to decision making
 - closed knowledge systems
 - possible use cases (demos)
- Where do I start?
- Business challenges – risks & implementation plan
- Conclusion
- Q&A





About Pixl8



Founded in
2001



200+ membership clients



Privately owned
and managed



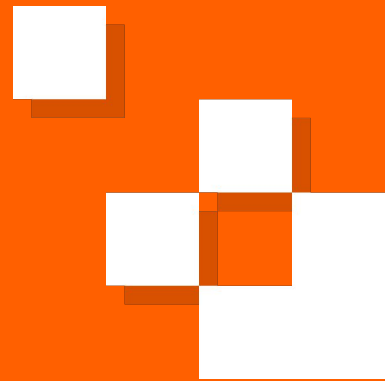
Client led
roadmap



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



What is AI?





ChatGPT says...

"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."



Artificial Intelligence (AI)

Enables machines to perform tasks that usually require human intelligence, such as decision-making, problem-solving, and pattern recognition.



Machine Learning (ML)

A type of AI where systems improve their performance over time by analysing data, helping predict trends e.g. behaviours in membership activities



Natural Language Processing (NLP)

Allows machines to understand and respond to human language, powering chatbots e.g. automating member communication.



Predictive Analytics

Uses historical data to forecast future outcomes, e.g. helping you anticipate member needs and engagement.



Generative AI (GenAI)

Systems that create quasi-original content, such as text, images, or music, using machine learning models trained on data and guided by human text prompts.



Supervised vs Unsupervised Learning

AI that is trained on labelled data to predict outcomes (e.g. member renewals) vs AI that learns by finding patterns in data on its own, without any labelled examples to guide it.

AI

Cognitive computing

AI that mimics human thinking to improve decision-making and solve complex problems - e.g. analysing vast quantities of data to enhance member engagement with personalised experiences, automate customer support, predict retention risks, and make data-driven decisions.



Open vs closed AI

Open AI promotes collaboration and transparency by being accessible to all, while Closed AI restricts access, keeping technology and data proprietary.



Recommendation systems

AI that predicts and suggests content or services - e.g. to members based on their past behaviour.

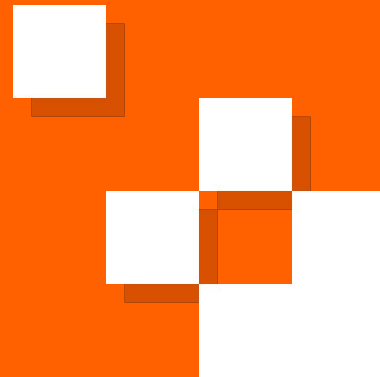


Individual vs utility AI

AI tools that individuals use to enhance their specific role (e.g. note taking, data sorting) vs utility-level solutions that focus on broad organisational needs (e.g. automating admin processes, data analytics).



What is AI? - essential terms





Poll: Is your organisation currently using any of the following types of AI?

(Select all that apply)

Poll 1

1. Is your organisation currently using any of the following types of AI? (select all that apply) (Multiple choice)

We aren't using AI (14/44) 32%

Exploring AI options, but not implemented yet (19/44) 43%

Individual AI tools (e.g. chatbots, recommendation engines, virtual assistants) (18/44) 41%

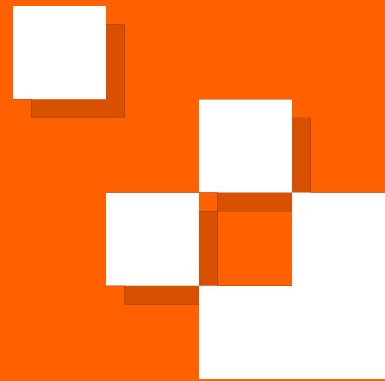
Utility AI systems (e.g. AI for data analytics, membership management automation, fraud detection) (0/44) 0%

Custom-built AI solutions (tailored to specific needs or processes within your organisation) (2/44) 5%





**AI or not AI?
That is question.**



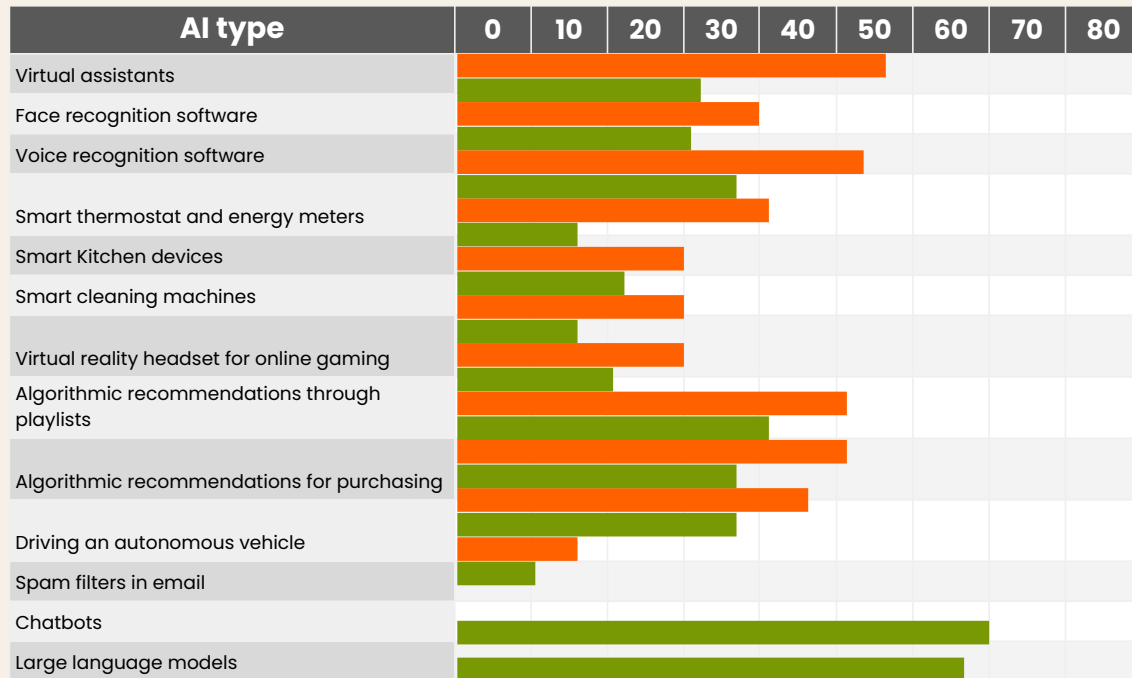


AI or not AI that is the question?





Where are we now?



AI Use (%)

Personal Use

In the workplace

Individual AI dominates – for now

- We are seeing more use of AI assistive technology – allowing people to things more with less
- Risk is accuracy of results and reliance on quality of the prompts you give
- All these things are to assist productivity on an individual level

[Source: AIPRM survey data](#)



- AI technology is rapidly accelerating and expanding
- 500+ generative AI tools available
- LLMs you need: OpenAI, Claude, Perplexity, LLAMA, Gemini, Azure ML
- Over 400,000+ Models available now

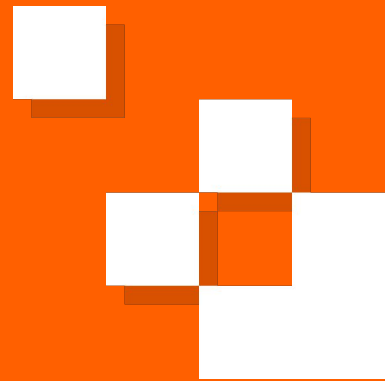
<https://huggingface.co/>





The Art of the Possible

– what we can do now





The Art of the Possible

- **Problems to be solved**
 - accessibility, manual tasks, time
- **Outputs**
 - content creation (copy, images), data analysis, reports, decisions, recommendations
- **Limitations**
 - can hallucinate/make up answers
- **Inherent bias**
 - when based on open data sources





```
ollama run llava
09:41:56 alexskinner@Alexs-MacBook-Pro-M3-Max ~/Desktop/MemberWise AI demo material
$ ollama run llava
>>> provide a short description of the following image for a visually impaired person ./tellmewhatitiserror.jpg in less than 100 characters
The image is a photo of a book with text on it, but I'm unable to provide specific details about the contents of the text because the image is blurry and low-resolution.

>>> provide a short description of the following image for a visually impaired person ./tellmewhatitiserror.jpg in less than 100 characters
The image is a photo of a book, but it's not clear enough to make out any text or specific details about the content of the book.

>>> provide a short description of the following image for a visually impaired person ./tellmewhatitis.jpg in less than 100 characters
Added image './tellmewhatitis.jpg'
The image is a cute photo of a small hamster sitting on a skateboard.

>>> Send a message (/? for help)
```

Demo: Image alt-tag generation - [watch the presentation](#) on MemberWise Learn



Chat GPT

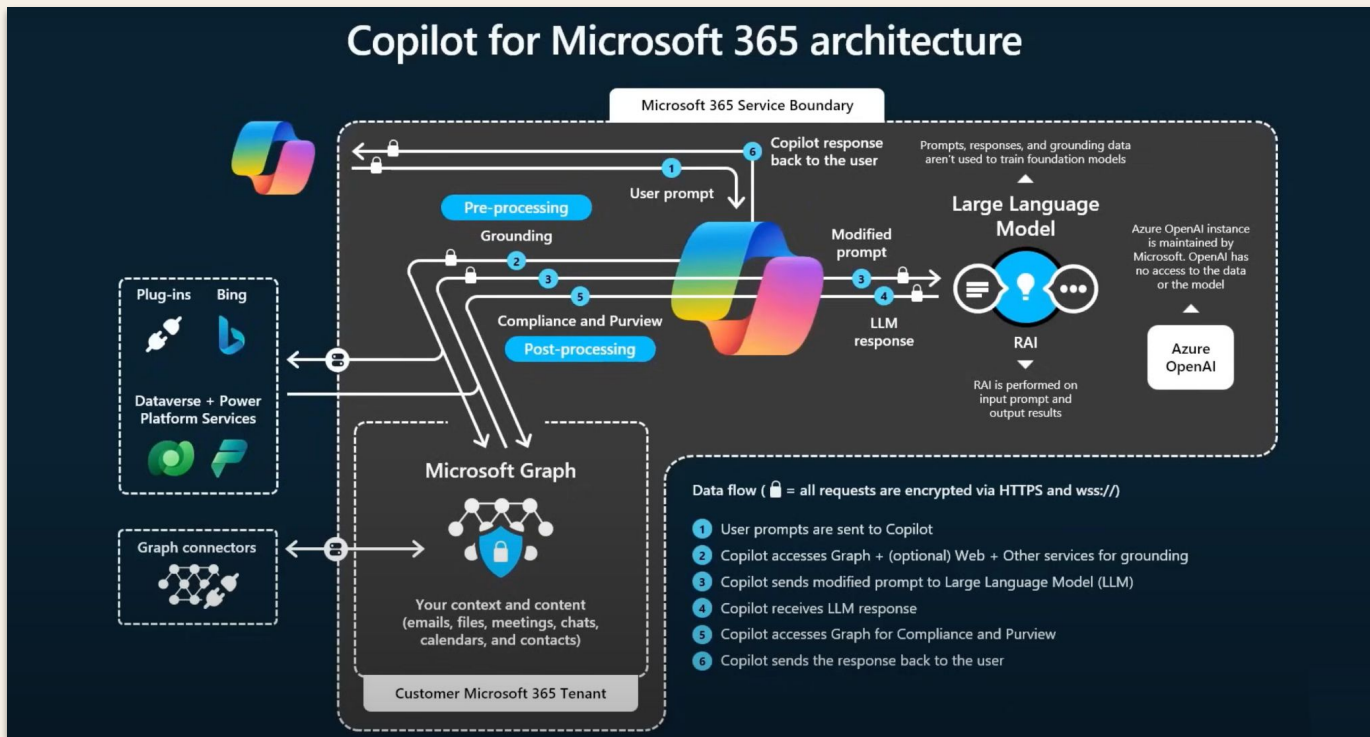


Prompt Engineering

- Prompts can be Huge
 - Context + question + grounding + output format
- Explain reasoning add
 - Let's go step by step
- Few shot prompting
 - Show examples e.g label
:negative
- Least to most
 - Question + "Break into subtasks"
- Try adding emotion

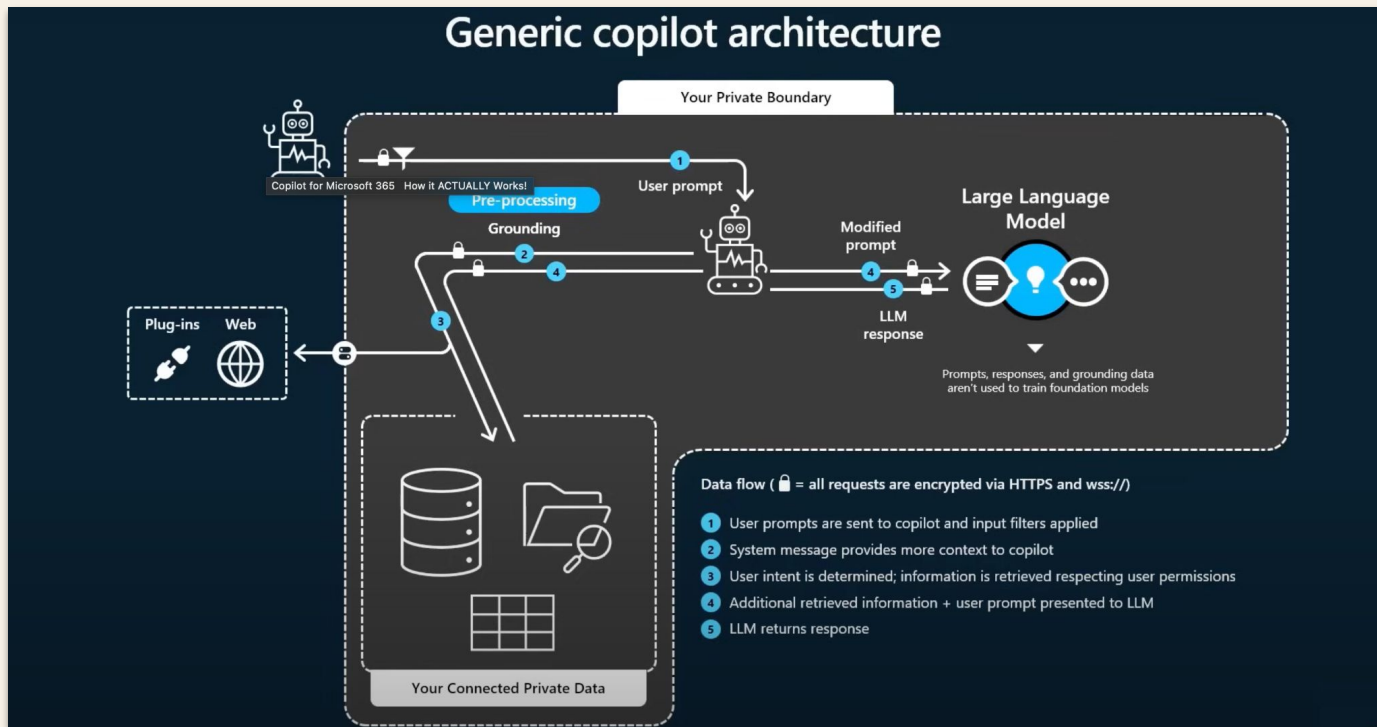


Retrieval Augmented Generation (RAG)





Retrieval Augmented Generation (RAG)





The Art of the Possible



- I can find it!

- AI can already solve common membership pain points
- E.g. you have decades of knowledge resources – difficult for members to quickly find info
- AI provides advanced search & improves findability of content



+ New Chat

TODAY

Discussing how unified pla...  

THIS WEEK

Discussing how unified pla...

Analyzing member engage...

Member engagement strat...

ChatGPT-4

1 LocalDocs

3. **Scalability:** A unified platform can make it easier to scale up AI operations. As the platform can handle more data and more complex AI algorithms, it can support the growth and evolution of AI applications.


4. **Efficiency:** A unified platform can streamline the development and deployment of AI systems. This can save time and resources, making AI more cost-effective.

5. **Consistency:** A unified platform can ensure consistency in the way AI systems are designed, trained, and used. This can enhance the performance and reliability of AI applications.


6. **Security:** A unified platform can provide robust security features, protecting AI data and systems from cyber threats. This can help maintain the integrity and confidentiality of AI operations.

7. **Interoperability:** A unified platform can promote interoperability among different AI systems, enabling them to work together seamlessly. This can enhance the versatility and effectiveness of AI applications.

In conclusion, a unified platform can significantly enhance the benefits of AI by providing a robust, scalable, and efficient infrastructure for AI operations. It can also foster collaboration and interoperability among AI systems, improving their performance and utility.

 You

Discuss how a Unified platform underpins AI advantage


 GPT-4

ChatGPT-4

A unified platform provides a significant advantage when it comes to AI implementation and usage. Here are a few reasons why:

1. **Comprehensive Data:** AI tools require a large amount of data to function effectively. A unified platform provides a single view of all data, eliminating the need to connect multiple systems to gather the necessary information. This comprehensive data can be easily referenced by AI tools, enhancing

...


Send a message... 

DEMO AI Docs

3 files – 19199 words

Memberwise Knowledge

10 files – 50335 words

 Pixl8 Guides and Knowledge

10 files – 30490 words

Productisation knowledge

1 file – 57710 words

+ Add Docs

Select a collection to make it available to the chat model.



Demo: Using owned knowledge - [watch the presentation](#) on MemberWise Learn




Hey John

How can we help today?

What personalisation capabilities does ReadyMembership have ?



 Search Articles

 Search Documents

ReadyMembership is a single composable member experience platform that is designed to supercharge member experiences. It is intelligent, flexible, upgradeable, right sized and hyper-personalised. It enables you to easily create personalised journeys across channels.

For example, it allows for personalisation in presenting a member with an event booking flow or joining journey. The messaging, flows and pricing can be personalised based on the member's preferences, making the journey more efficient and effective for both the user and the organisation.

Another feature is the ability to send a digest email of the latest activities within the organisation that is personalised to the member's interests.



Sources

A Guide to Intelligent, Personalised Membership Platforms

 Alex Skinner

Chapter 4: Personalising Member Journeys with ReadyMembership

 Collection: ReadyMembership

Other ReadyMembership Resources

09 July 2024

Maximising Member Engagement: The Role of Hyper-Personalisation in Modern Membership Platforms

 Whitepaper

09 July 2024

Transforming Member Experiences: A Deep Dive into Personalised Membership

Related

How does ReadyMembership support hyper-personalisation for member experiences?



Features of ReadyMembership for personalised event booking and joining journeys





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

(Select all that apply)

Poll 2

1. What are the most valuable applications you've seen (or expect) from AI? (select all that apply) (Multiple choice)

Personalised member engagement (e.g., customised content, recommendations) (27/36) 75%

Member support automation (e.g., chatbots, virtual assistants) (20/36) 56%

Data-driven decision-making (e.g., predictive analytics, trend forecasting) (25/36) 69%

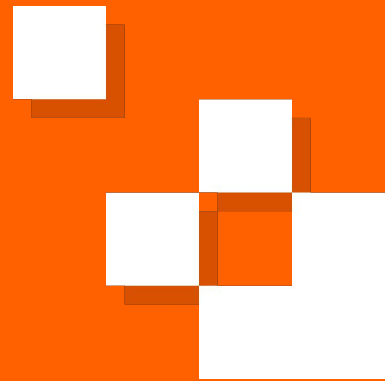
Process automation (e.g., membership renewals, event management) (24/36) 67%

Fraud detection and security enhancement (7/36) 19%





Getting your data ready





Getting your data ready

Open AI vs Closed AI



Open AI

- **Definition:** AI models and tools that are publicly accessible, allowing for modification and sharing.
- **Key Features:**
 - Transparent and community-driven development.
 - Encourages innovation and collaboration.
- **Example:** Early versions of GPT models.

Closed AI

- **Definition:** AI systems that utilise proprietary algorithms, owned knowledge, including company-specific CRM data, offering more reliable and precise insights than open data.
- **Key Features:**
 - Restricted access ensures control, security, and competitive advantage.
 - Leverages proprietary data for accuracy.
- **Example:** Apple's Siri, company-specific AI tools.



Getting your data ready

What CRM data can you use with AI?

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



Getting your data ready

What CRM data can you use with AI?

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



**So that's all the data
you need, right?**



Getting your data ready

What types of knowledge data can you use with AI?

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)

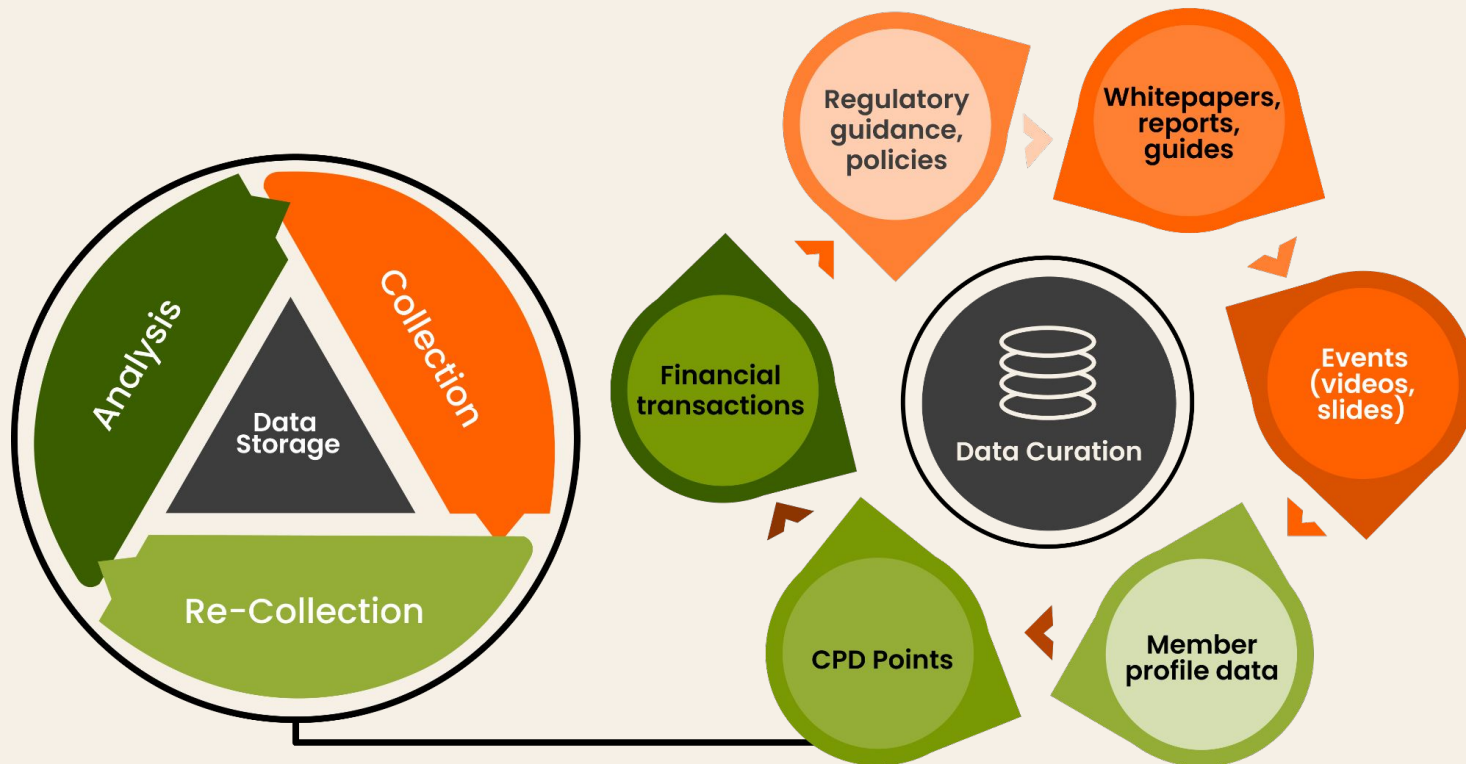
Market research: competitor
insights, industry trends

Personalised Member
Communications



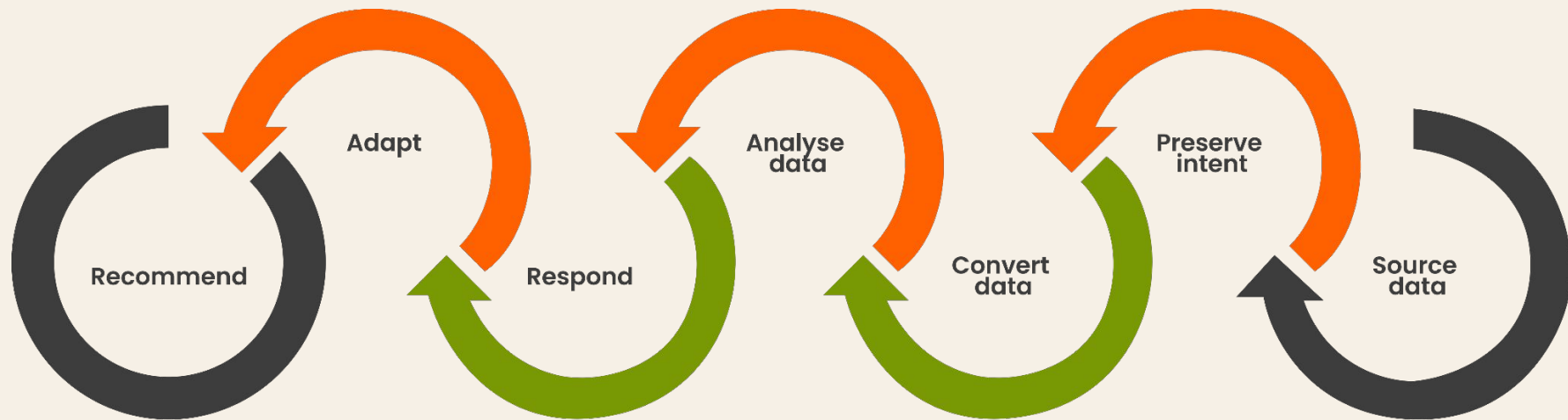
Steps of data curation

CRM & KNOWLEDGE





Steps of AI creation & curation



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



Getting your data ready – data maturity





Poll: Which stage of data maturity are you currently at?

Poll 3

1. Which stage of data maturity are you currently at?
(Single choice)

Manual data management (4/38) 11%

Multiple data silos (3/38) 8%

Partial integrated (22/38) 58%

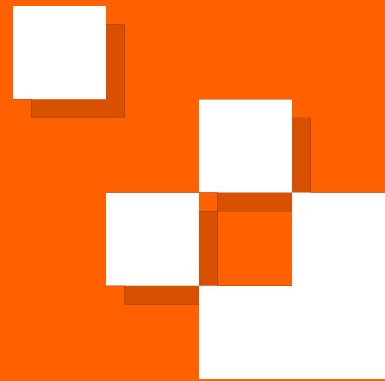
Mostly integrated (8/38) 21%

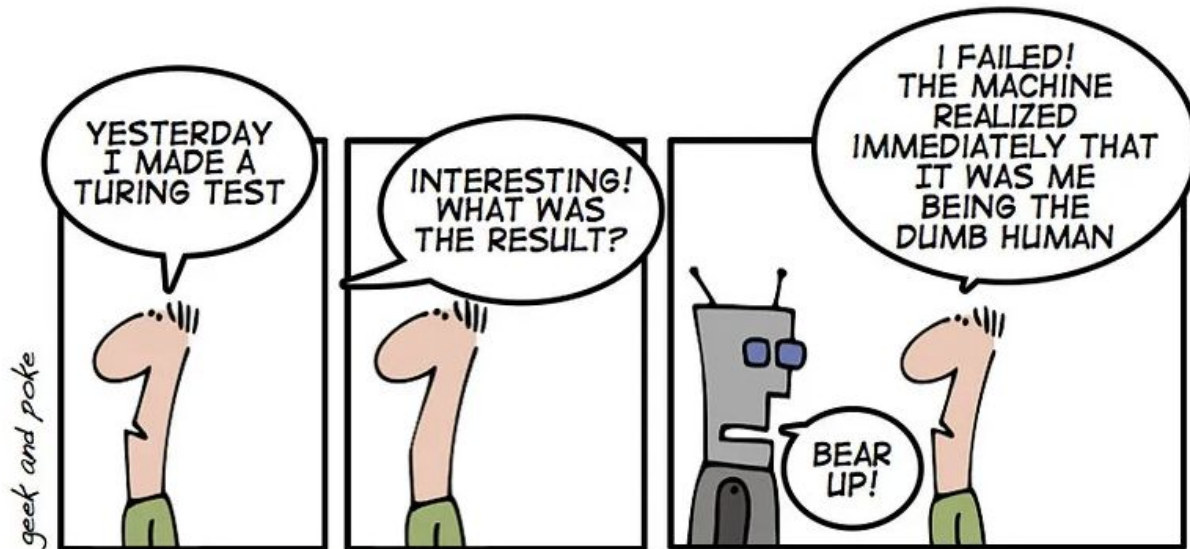
Fully integrated - trusted single view of data (1/38) 3%



Utility AI

From assistance to decision making



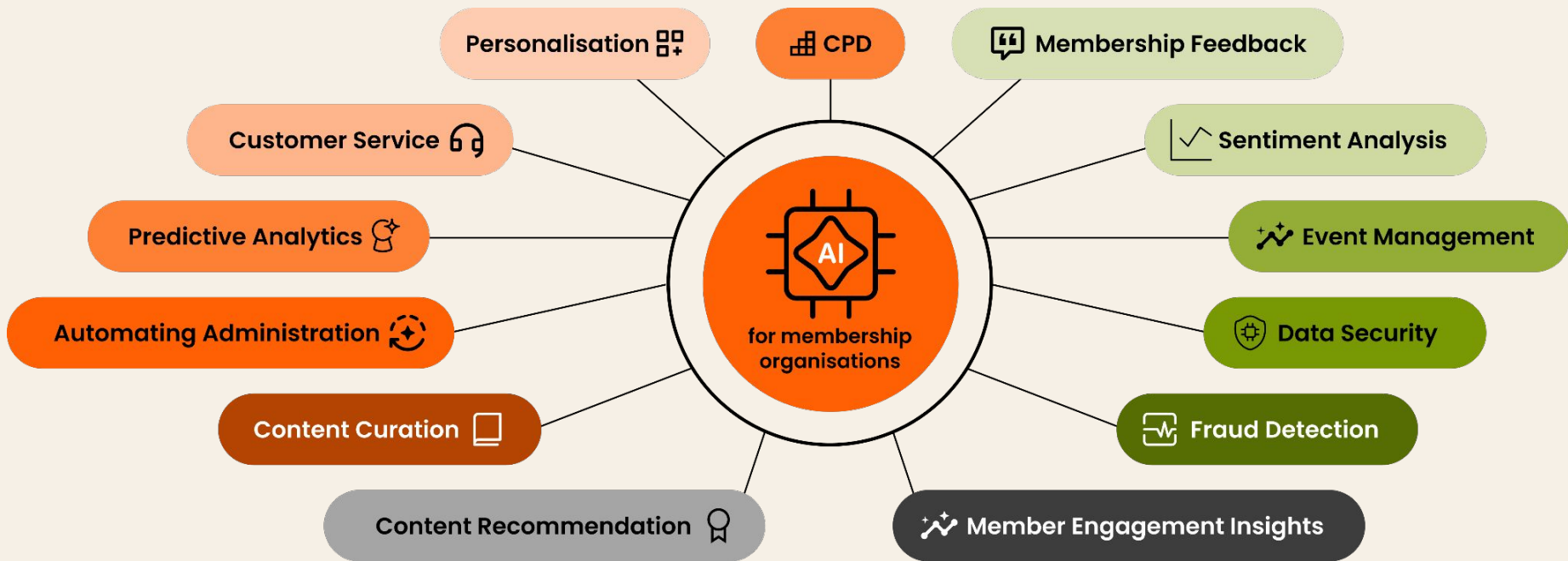


TURING TEST 2208



Utility AI in membership – potential use cases

Your closed knowledge superpower





+ New Chat

TODAY

New Chat

Analyzing member data with

Analyzing membership dat...

THIS WEEK

Inquiring about personalis...

Discussing how unified pla...

Discussing how unified pla...

Analyzing member engage...

Member engagement strat...

You

Given the following data
Member numbers Associates 2000 Members 5000 Fellows 1000
Renewal rates Associates 94% Members 96% Fellows 98%
Engagement score Associates 42% Members 88% Fellows 26%
Provide me insights on the member data

GPT4AI Llama 3.1 8B Instruct 128k

Based on the provided data, here are some insights:

Membership Structure:

- The majority of members (5000) are categorized as "Members", followed by "Associates" (2000), and then "Fellows" (1000).
- This suggests that the organization has a strong base of general membership with a smaller subset of more senior or dedicated individuals ("Fellows").

Renewal Rates:

- The renewal rates for each category are high, indicating a good level of engagement from members.
 - "Associates" have a 94% renewal rate, suggesting they find value in their membership and choose to continue it at a relatively low

Send a message...

46 tokens/sec · Metal

LocalDocs

DEMO AI Docs

3 files – 19199 words

Memberwise Knowledge

10 files – 50335 words

Pixl8 Guides and Knowledge

10 files – 30490 words

Productisation knowledge

1 file – 57710 words

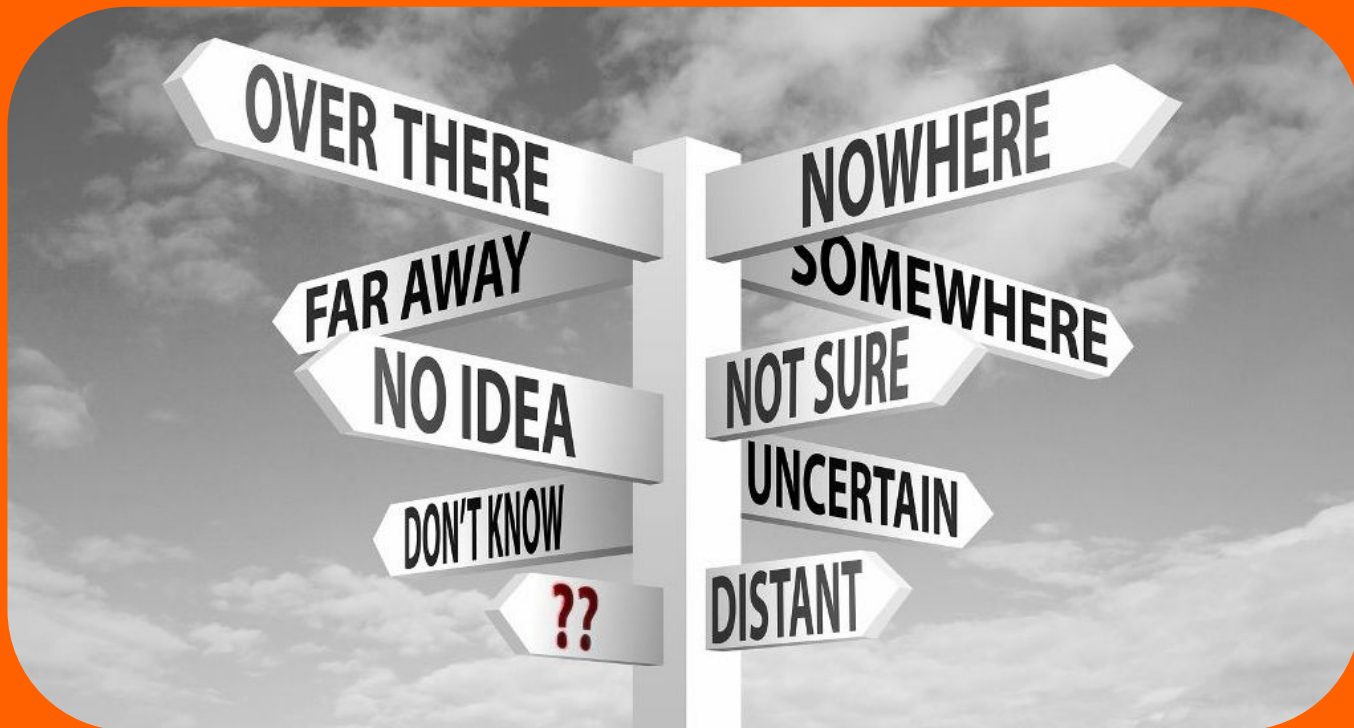
+ Add Docs

Select a collection to make it available to the chat model.

Demo: Getting insights from your data - [watch the presentation](#) on MemberWise Learn



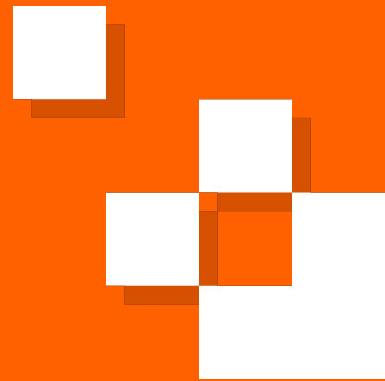
Where do I start





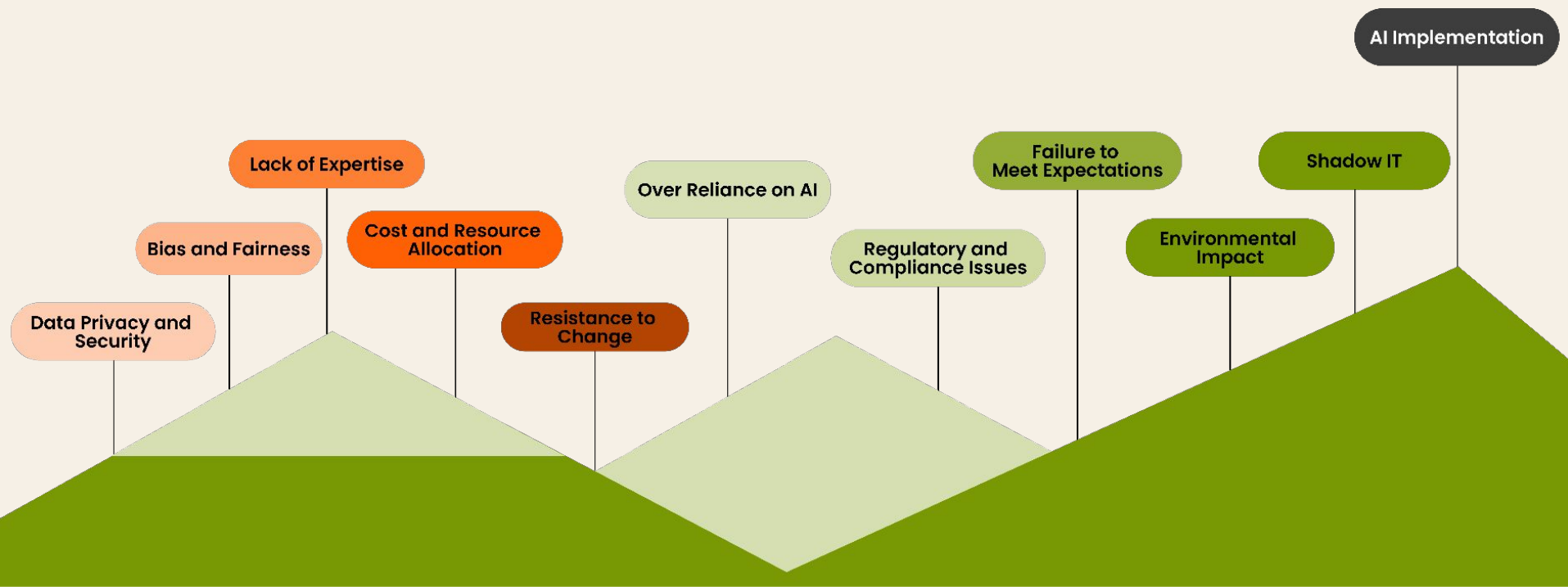
Business challenges

- risks and implementation



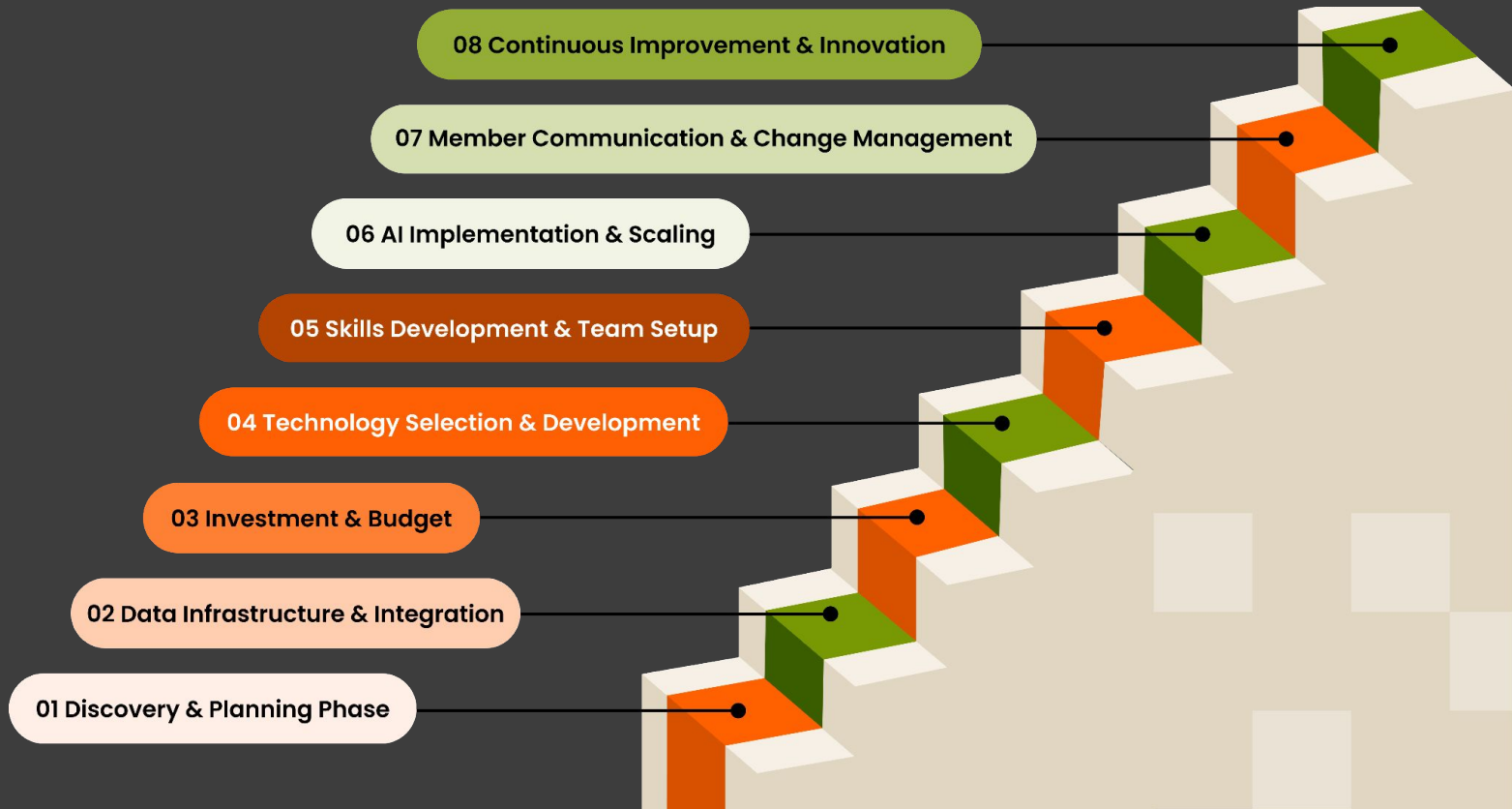


Business challenges – risks





AI implementation plan





Conclusion

- Have a clear business problem that needs solving
 - don't do AI for AI's sake
- Review data
- Review your technology and internal processes
- Review your internal culture
- Be brave, be excited! There's a lot of opportunity



Get Ready for AI with Pixl8



AI Prep: Data-Driven Groundwork for Membership Excellence

11:50 AM – 12:20 PM GMT, Thurs 14 Nov 2024
Room 5

Getting ready for AI series – readymembership.com #readyforAI



Alex Skinner

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ReadyMembership



Julian Davis

COO, World Commerce and
Contracting World (WorldCC)

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Q&A

