



Informing . Educating . Inspiring
Associations & Membership Bodies Leaders Collective

This Institute's mission is to foster the successful adoption of Generative AI technologies within associations and membership bodies.

V1.3 AI-CAE Module 3: AI & Member Engagement

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The AI Institute's mission is to foster the successful adoption of Generative AI technologies within associations and membership bodies.

AI-CAE Course Overview

Module	Key Topics
1. AI Readiness & Strategy for Leaders	AI strategy development, leadership role, sector trends.
2. AI Use Cases & Implementation Roadmaps	Prioritising AI projects, AI self-assessment tools, overcoming barriers.
3. AI & Member Engagement	Personalisation, automation, predictive analytics.
4. AI Governance & Ethical Leadership	Risk management, AI policies and governance.
5. AI Adoption in Operations & Finance	AI for efficiency, cost-savings, automation, AI-assisted decision-making.
6. Cultural Impact of AI Adoption	Leading change, overcoming resistance, aligning AI with professional standards.
7. Capstone: AI Strategy Development Project	Participants develop and present an AI strategy for their association.

V1.3 AI-CAE Module 3: AI & Member Engagement



Module 3

AI & Member Engagement

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"Welcome to Module 3 on AI and Member Engagement.

The Learning Objective is: Establishing AI's strategic relevance for member engagement in associations and membership bodies, positioning it as an executive leadership opportunity to address engagement challenges and improve member value.

By the end of this module, you will be able to:

- Explain how AI can address common member engagement challenges and unlock measurable value in retention, satisfaction, and personalisation.
- Identify and evaluate AI use cases that enhance member journeys, improve responsiveness, and strengthen community connection.
- Assess your association's readiness for member-facing AI, including data quality, team capacity, and cultural alignment.
- Apply a phased roadmap for implementing member-focused AI pilots, moving from data insight to practical service improvements.
- Develop strategic priorities for AI in engagement that align with mission goals, governance expectations, and member trust.
- Prepare to integrate member engagement insights into your association's broader AI strategy through the Module 7 Capstone project.

AI empowers associations to improve member engagement from fragmented, resource-intensive activity into strategic, data-driven value delivery—directly supporting goals, organisational mission and sustainability.

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AI empowers associations to improve member engagement from fragmented, resource-intensive activity into strategic, data-driven value delivery—directly supporting goals, organisational mission and sustainability.

Key Strategic Considerations

- From General AI Strategy to Member-Specific Value
- Strategic Resource Allocation for Measurable Returns
- From Data Collection to Member Intelligence
- Differentiation Through Digital Relevance

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There are Key Strategic Considerations

Let's briefly walk through the four key leadership considerations:

From General AI Strategy to Member-Specific Value.

You've seen how AI supports overall strategic leadership and roadmap development. Now we focus on applying AI to improve your most important asset—your member relationships. AI enables new levels of personalisation, responsiveness, and relevance that directly supports your goals and mission.

Strategic Resource Allocation for Measurable Returns.

AI isn't about new tools for their own sake—it's about impact.

With limited budgets and competing priorities, leaders must prioritise initiatives that deliver visible and measurable returns.

AI improved engagement supports improved retention, deeper participation, and increasing satisfaction—making the case for strategic investment.

From Data Collection to Member Intelligence.

Most associations already collect a great deal of member data—but it's underused.

AI transforms that data into actionable insights. This means you can move from manual reporting to real-time intelligence that guides better member centric decisions and interventions.

Differentiation Through Digital Relevance.

As digital services become standard, they no longer differentiate you.

AI-enabled experiences—such as proactive content delivery or predictive member guidance and support allows you to stand deliver better member experiences that feels and are personalised, timely, and valuable.

AI can and should be a tool that delivers both improved experiences and operational efficiency.

Reflection

Reflection *"What measurable improvements in member value would justify investment in AI over the next 12 months?"*

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Let's begin by reflecting on where AI could help address specific engagement challenges in your own organisation.

"What measurable improvements in member value would justify investment in AI over the next 12 months?"



Downloadable Knowledge Tools

- AI Stakeholder Communication Planning Matrix (tailored for framing the member engagement narrative to boards and staff).
- AI Cultural Readiness Assessment (evaluate internal openness to member-facing AI initiatives).
- Leadership Alignment for AI Adoption (align executive and functional leaders on priorities and risks).

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These tools have been reviewed by you in previous modules.

It would be good idea to review them again. The tools to review now are:

AI Stakeholder Communication Planning Matrix tool, is tailored for framing the member engagement narrative to Board and staff).

AI Cultural Readiness Assessment tool, to evaluate internal openness to member-facing AI initiatives.

Leadership Alignment for AI Adoption tool, for align executive and functional leaders on priorities and risks.

Improving Member Engagement

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Improving Member Engagement

Our Learning Objective is Providing association leaders with researched-based AI use cases specifically for member engagement, enabling informed prioritisation of opportunities relevant to their organisational context.

AI is improving member engagement for a growing number of associations—offering clear use cases that deliver practical benefits while supporting strategic goals.

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AI is improving member engagement for a growing number of associations—offering clear use cases that deliver practical benefits while supporting strategic goals.

"Now let's explore four ways associations are using AI to improve member engagement.

Personalised Member Journey Improvement Use Case

- AI recommends content, learning, and events tailored to member interests and behaviours.
- Example: A professional institute used AI to personalise CPD resources, increasing completion rates and content relevance.

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Personalised Member Journey Improvement

AI allows you to tailor experiences to each member's persona—automatically recommending content or learning opportunities based on interests and behaviours.

One Institute increased CPD completions by matching members to an extensive range of resources—optimising and improving learner's experience and usage.

Proactive Member Support & Retention Use Case

- Predictive analytics flags disengaged members for early intervention.
- Example: A membership body improved early-career retention by 7% by targeting at-risk profiles with tailored outreach.

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Proactive Member Support & Retention.

With predictive models, AI can identify in advance members at risk of non-renewal based on declining engagement irrespective of CRM or AMS system you may be using.

A professional body using this insight reached out to early-career members with targeted support—raising retention where it had previously been weakest.

Community Intelligence & Connections Use Case

- AI helps map interests, expertise, and behaviours to enable member-to-member matching for mentoring, networking, committee invitations, initiatives or projects.
- Example: Associations reported greater peer-to-peer engagement where AI was used for intelligent community facilitation.

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Community Intelligence & Connections

Rather than treating members as passive recipients, AI can be used to connect them with each other.

By mapping preferences, interests and expertise, associations could be facilitating mentoring, networking, and collaboration at scale turning data into meaningful connections.

Conversational Member Service Improvements Use Case

- Chatbots and AI assistants handle routine questions significantly improving response time and freeing staff for higher quality complex support.
- Example: An industry body automated over 60% of member queries using a chatbot, increasing satisfaction and cutting staff hours.

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Conversational Member Service Improvements

AI-powered chatbots handle common to complex questions 24/7, improving responsiveness and freeing staff.

A membership body automated with chatbots over 60% of member queries while maintaining high satisfaction—redirecting staff to more complex or relational support.



Reflection

Reflection *"How would your members' experience improve if one of these capabilities were implemented?"*

- Personalised Member Journey Enhancement
- Proactive Member Support & Retention
- Community Intelligence & Connections
- Conversational Member Service Improvements

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A moment of Reflection for you

How would your members' experience improve if one of these capabilities were implemented?"

- Personalised Member Journey Enhancement
- Proactive Member Support & Retention
- Community Intelligence & Connections
- Conversational Member Service Improvements

As you reflect, think about where you might begin—what use case could deliver the most value quickly, and what foundations need to be in place to do that effectively.



Downloadable Knowledge Tools

- AI Use Case Evaluation Matrix
 - Helps assess alignment and feasibility for member engagement priorities
- AI Change Communication Templates
 - Helps support internal and member-facing communication of AI use case benefits
- From Pilots to Practice Implementation Guide
 - Helps move from small trials to scalable, governed initiatives

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Please ensure you have reviewed these tools.

AI Use Case Evaluation Matrix

AI Change Communication Templates

And From Pilots to Practice Implementation Guide tool

Using Member Data More Intelligently – Practical AI Starting Points

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Using Member Data More Intelligently – Practical AI Starting Points

Our Learning Objective is Enabling leaders to identify practical, low-barrier AI opportunities using data already available in their CRM, AMS, Events, Billing, CPD, Sales to Intelligently support member engagement.

AI allows associations to transform raw interaction data into a structured engagement index—empowering leaders to make data-informed decisions that improve retention and member value.

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AI allows associations to transform raw interaction data into a structured engagement index—empowering staff and leaders to make data-informed decisions that improve retention and member value.

"Most associations collect plenty of data, like event attendance, resource downloads, renewals, journals and products sales, —but struggle to quickly and simply translate that into actionable insights.

This is where AI-supported engagement measurement becomes valuable.

In the spirit of keeping things simple, Let's break it down using a simple Breadth–Depth–Loyalty model:

Content Personalisation Using Interaction Data

- If your CRM tracks clicks, logins, or event registrations, AI can use that data to recommend relevant resources, services, journals or events.
- No new systems are needed—just better use of existing digital records.

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Content Personalisation Using Interaction Data.

If your systems tracks linked clicks, downloads, logins, or event registrations, AI can use that data to recommend relevant resources, services, journals or events.

No new IT systems may be needed—just a far better use of existing database records.

Member Journey Mapping

- Analyse data from CRM or AMS systems to identify engagement drop-off points and target retention efforts.

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Member Journey Mapping.

Your CRM already shows when members join, renew, or lapse.

With a bit of analysis, you can pinpoint where engagement declines—and plan targeted interventions.

For many, often CRM reporting can be complex, but simple batches of anonymised data could be exported, and the AI tool could then be instructed to analyse and identify engagement drop-off points and target retention efforts. The process and AI Prompts could be reused.

Behavioural Segmentation

- Use registration, attendance, and activity patterns to develop predictive member segments.

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Behavioural Segmentation

Data on how members register, attend, and interact with your services can form engagement 'profiles'. Most associations have very many touch points with their constituents, almost all of it could be brought together for AI to produce Behavioural Segmentation.

AI helps surface patterns to guide decisions like who needs outreach or who is ready for deeper involvement enabling your staff to focus on personal and more meaningful engagements.

Trigger-Based Messaging

- Automate engagement nudges based on inactivity, milestones, or renewal windows using data already in your systems.

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Trigger-Based Messaging.

By Using database triggers—like a missed event or approaching renewal—you can automate timely, relevant messages. AI can optimise timing and message content based on past outcomes and interactions and communications.



Reflection

Reflection "Which existing member data fields are most underused for insight or segmentation?"

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“Which existing member data fields are most underused for insight or segmentation?”

Now, consider: what existing data might you be underusing—and how could AI help you do more with less?”

You could also use the AI tool to work out what data is missing that could improve building more effective engagement models and scoring for highly targeted outreach. This will enable you to make better use of data silos and avoid complex IT projects.

Member Engagement Index – Making Data Actionable with AI

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Member Engagement Index – Making Data Actionable with AI

Our Learning Objective is Introducing leaders to practical, AI-enabled approaches for scoring member engagement using existing behavioural and interaction data, enabling strategic prioritisation and personalisation.

AI allows associations to transform raw interaction data into a structured engagement index—empowering leaders to make data-informed decisions that improve retention and member value.

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AI allows associations to transform raw interaction data into a structured engagement index—empowering leaders to make data-informed decisions that improve retention and member value.

"Most associations collect plenty of data—event attendance, resource downloads, renewals—but struggle with using many spreadsheets and unable to translate that into actionable insights.

This is where AI-supported engagement measurements becomes valuable.

There are best practice-based ways of measuring engagement.

But, Let's break it down using a very simple Breadth–Depth–Loyalty model if you are not already using an engagement model and scoring system.

The Member Engagement Index (MEI)

Based on weighted metrics aligned with the Breadth–Depth–Loyalty model:

- **Breadth:** Number of engagement types (e.g. events, downloads, committee activity)
- **Depth:** Frequency and recency of those engagements
- **Loyalty:** Indicators of commitment (e.g. renewal history, events, volunteering)

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The Member Engagement Index is a simple and quick top-level view. It helps leaders to turn data into direction, consensus and momentum.

The Member Engagement Index does not compete nor replace formal Engagement Scoring Models and Methodologies.

Breadth – is the Types of Engagement

- Think of this as ‘how many kinds’ of different interactions or touch-points a member has, this will vary based on Member Personas.
- Obviously, a member who attends events, joins committees, and downloads resources is more engaged than one who only attends webinars.
- AI models can identify members by types of membership who could increase their engagement by responding to specific call-to-action messages or invitations.

Depth – is the Recency and Frequency

- This tells you how often and how recently members engage.
- AI models can weight a recent action higher than one from last year, and track consistency over time.
- AI models can factor in the ‘decay scoring’ measuring engagement making the results more accurate.

Loyalty – is the Long-Term Signals

- This includes metrics like how many times a member has renewed, referred others, or volunteered.
- These are commitment indicators and correlate with higher retention and value.
- AI models can use correlational models making the results more meaningful.

You could also instruct the AI tool to build the Member Engagement Index model and then use the AI to use your real anonymised data for analysis. AI applies pattern recognition to refine weights over time based on impact correlations.

Simple Member Engagement Index (MEI)

Dimension	Metric	Sample Weight
Breadth	No. of activity types	25%
Depth	Event attendance recency	30%
Loyalty	Consecutive renewals	45%

AI applies pattern recognition to refine weights over time based on impact correlations.

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AI can use your real anonymised data, learning which combinations best predict retention or satisfaction.

A sample engagement score might weight these areas
say, 25% for breadth,
30% for depth,
and 45% for loyalty.

AI can refine those weights using your real data, learning which combinations best predict retention or satisfaction.

A scoring framework provides structure to change that—turning data into direction and targeted action.



Downloadable Knowledge Tools

- AI Use Case Evaluation Matrix

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Please review the AI Use Case Evaluation Matrix tool.

Pulse Check – Member Engagement Readiness

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Pulse Check – Member Engagement Readiness

Our Learning Objective is Helping leaders consolidate learning and reflect on your organisational readiness to apply AI in member engagement,

At the midpoint of this module, this pulse check offers a structured moment for leaders to reflect on their current engagement approach, data capacity, and AI readiness.

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At this midpoint of the module, the pulse check offers a structured moment for you to reflect on your current engagement approach, data capacity, and AI readiness.

You've seen few example of how AI can support member engagement through personalisation, using data silos, and engagement measurement.

But the key question is—how ready is your organisation to apply these tools?

We're now halfway through this module, and it's a good point to pause and reflect.

This pulse check is a good activity; it helps you assess your current position and consider practical next steps.

Pulse Check (select one per row)

Area	Readiness Level
Engagement Clarity	☐ We have a clearly defined member engagement strategy. ☐ We have a general approach but lack precision. ☐ Our engagement activities are mostly reactive.
Use of Member Data	☐ Our data is well organised and supports engagement planning. ☐ We collect a lot of data, but it's underused. ☐ Our data is fragmented and hard to use.
AI Awareness in Teams	☐ Staff are aware of how AI could support member engagement. ☐ Some awareness, but limited understanding of applications. ☐ There is little to no awareness of AI use in this area.
Leadership Alignment	☐ Our leadership team supports investment in AI for engagement. ☐ Leadership is open but not yet aligned on priorities. ☐ There is limited executive focus on this area.

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We will review four areas:

- engagement strategy clarity,
- use of member data,
- the awareness level of AI among your staff,
- and how well aligned your leadership is around AI opportunities.

Select one option per row and jot down what stands out.

Where are you confident?

Where is there more work to do?

This isn't about being perfect—it's about being clearer. As we all know, clarity is the foundation of smart strategy.

take 2–3 minutes to reflect. Jot down your responses and identify initial thoughts on action areas.

When you're ready, we'll move on to the second half of the module—starting with prioritising the right AI initiatives for your member engagement goals.

Reflection

Reflection "How well is your current engagement strategy supported by usable data?"

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Another moment of Reflection for you

How well is your current engagement strategy supported by usable data?



Downloadable Knowledge Tools

- Member Engagement Pulse Check Worksheet

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Please review the Member Engagement Pulse Check Worksheet.

Use the worksheet to capture your selections for each readiness statement and reflect on what they reveal about your current position. Then, use the space provided to identify **one practical action** you can take to move forward in each area.

Member-Focused AI Initiatives

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Member-Focused AI Initiatives

The Learning Objective is Equipping leaders with a framework to evaluate and select AI initiatives that deliver meaningful member engagement improvements, while addressing feasibility, impact, and governance maturity.

Not all AI opportunities are equal. Leaders focus on high-impact, feasible projects aligned with member priorities and organisational readiness.

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Not all AI opportunities are equal.

Successful Leaders focus on high-impact, feasible projects aligned with member priorities and organisational readiness.

Strategic pilots serve as crucial bridges between exploratory AI initiatives and structured implementation.

For many leaders it's about, moving from experimentations into a meaningful implementation.

Having started to explore how AI can support member engagement, it's now time to decide where to focus your efforts.

This prioritisation framework helps leaders identify the right initiatives by balancing two factors: value to members, and feasibility within their organisation.

Let's break it down:

Key Leadership Focus Areas

- Value to Members First
 - Prioritise AI initiatives that directly enhance member experience, personalisation, satisfaction, or value creation.
- Mission Alignment
 - Ensure AI projects strengthen your organisation's core mission and strategic objectives — not just operational convenience.
- Feasibility and Risk Assessment
 - Balance potential member benefits with realistic resource requirements, technology readiness, and ethical risk considerations.

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"When evaluating AI opportunities, its best to start with member value outcomes.

Successful associations pilot small, strategic initiatives that directly improve member experience, personalisation, and engagement.

Avoid investing heavily in operational AI projects that members never see or benefit from.



Reflection

Reflection *"What small-scale, high-impact AI initiative could you pilot within the next 6–19 months to deliver immediate member value?"*

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What small-scale, high-impact AI initiative could you pilot within the next 6–19 months to deliver immediate member value?

Perhaps you could Reflect now about which member-focused challenge could your organisation tackle with AI — and how might you prioritise your next steps?

Designing AI-Driven Member Experiences

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Designing AI-Driven Member Experiences

The Learning Objective is Introducing practical examples of how AI can enhance member-facing services and experiences, with an emphasis on improving satisfaction, responsiveness, and perceived value.

AI allows associations to move from generic member services to adaptive, responsive, and proactive experiences—without increasing staff workload.

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AI allows associations to move from generic member services to adaptive, responsive, and proactive experiences—without increasing head count or staff workload.

Key AI-Enabled Member Experience Areas

- **Conversational AI for Member Support**
 - Chatbots or AI assistants handle common queries (e.g. renewals, event FAQs), providing 24/7 availability and freeing up staff time. Example: A professional body deployed a chatbot to handle 68% of member enquiries, reducing staff email traffic and increasing resolution speed.
- **Personalised Learning and CPD Pathways**
 - Based on members' profiles, career stage, and interests, AI can recommend CPD or learning modules. Example: An institute increased course completions by 22% using AI recommendations triggered by profile data.
- **Event and Resource Recommendations**
 - AI suggests events, webinars, or content based on past engagement, sector interests, and peer behaviour.
- **Sentiment and Feedback Analysis**
 - AI analyses member feedback from surveys or emails to identify dissatisfaction early—allowing faster intervention.

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”Here we explore how AI can improve the member experience—not just by speeding things up, but by making services feel more relevant and responsive.

First could be Conversational AI for Member Support

Trained smart Chatbots can handle routine queries—like details portal login issues, about an event, use of a service or learning about a training course with FAQs—freeing up staff for more complex or relational support.

One professional body saw over two-thirds of member queries resolved without staff intervention.

Next are; Personalised Learning and CPD Pathways

AI can recommend learning pathways and content based on a member’s profile, persona and history.

An Institute saw a 18% improvement in CPD adoption by enabling AI recommendations.

Then there are the Events and Resource Recommendations

Instead of one-size-fits-all emails, AI can suggest the most relevant events or resources for each member, or a cohort of members—based on what other similar members have found useful that led to more engagement.

Making good use of Sentiment and Feedback Analysis has been out of reach for many

associations – that is, until now.

AI tools can use feedbacks, comments, and survey data to surface trends in satisfaction—or spot dissatisfaction before it grows, or how to support an initiative or campaign.



Reflection

Reflection *"What would success look like if a member-facing AI tool were introduced within the next 6-9 months?"*

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"What would success look like if a member-facing AI tool were introduced within the next 6-9 months?"

As you reflect, ask yourself: where could your member experience feel more personal, more responsive, or more valued — with the help of AI?



Downloadable Knowledge Tool

- AI Use Case Evaluation Matrix

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Please consider using the AI Use Case Evaluation Matrix when thinking about member facing AI tools.

From Strategy to Value – AI Implementation Roadmap for Member Engagement

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From Strategy to Value – AI Implementation Roadmap for Member Engagement

Our Learning Objective is Providing leaders with a manageable phased roadmap to implement AI initiatives that deliver measurable improvements in member engagement, scaled to organisational capacity.

AI implementation doesn't require a complete digital overhaul. This roadmap offers a practical structure to phase in member-facing AI based on your current readiness and capacity.

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AI implementation doesn't require a complete digital overhaul. This roadmap offers a practical structure to phase in member-facing AI based on your current readiness and capacity.

Implementing AI successfully is not an IT project and does require a structured and measurable approach.

This roadmap offers four phases that allow you to build confidence, reduce risk, and increase impact — without needing to do everything at once.

Phased Roadmap

Phase	Focus Area	Typical Actions.
Phase 1 – Foundation	Assess and prepare	Audit existing data, identify quick wins, build awareness
Phase 2 – Pilot	Test a specific use case	Small-scale chatbot, engagement score trial, or recommendation engine
Phase 3 – Consolidate	Evaluate and stabilise	Monitor outcomes, gather member feedback, refine processes
Phase 4 – Scale & Sustain	Expand impact	Integrate successful tools, train staff, develop policy and governance model

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Implementing AI successfully requires a structured approach.

This roadmap offers four phases that allow you to build confidence, reduce risk, and increase impact—without needing to do everything at once.

Phase 1: Foundation

This is where most associations start — reviewing and if possible, auditing their data, identifying the best use case, and building awareness across the leadership team.

Phase 2: Pilot

Test one practical use case. It might be a chatbot that answers event queries, or a scoring model that flags at-risk members. Keep it small, but it must be measurable.

Phase 3: Consolidate

Here you evaluate results. How did members respond? What needs improvement? This is where you strengthen the process before wider adoption and rollout.

Phase 4: Scale and Sustain

Expanding successful tools, embed training, and introduce light but focused governance with clear guardrails.

Create continuity — this is so the value doesn't depend on one person or pilot budget.

Also consider your organisation's size.

Smaller associations often can move faster.

Larger bodies may take longer—but have greater reach and ROI once implemented.



Reflection

Reflection *"Which phase of the roadmap is your organisation currently in—and what needs to happen to get started or to move the needle forward?"*

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"Which phase of the roadmap is your organisation currently in—and what needs to happen to get started or move the needle forward?"



Downloadable Knowledge Tools

- AI Roadmap Planning Template (create your own phased plan tailored to member engagement outcomes).
- From Pilot to Practice: Scaling Tips for Associations

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Please review these tools

AI Roadmap Planning Template

And From Pilot to Practice tool

Planning for Evolving AI Capabilities in Member Engagement

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Planning for Evolving AI Capabilities in Member Engagement

The Learning Objective is Preparing leaders to incorporate short term emerging AI developments into future strategic planning, ensuring sustainable and adaptive approaches to member engagement.

AI will continue to evolve—so must your member engagement strategy. This slide helps leaders future-proof decisions, build flexibility, and prepare for continuous value delivery.

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AI will continue to evolve quickly with many ‘vertical’ solutions based on a handful of Generative AI Models — so must your member engagement strategy.

It's important for leaders to future-proof decisions, build flexibility, and prepare for continuous value delivery.

"As we close Module 3, it's important to look forward.

AI is not static. The tools and techniques we've explored will evolve—and so will your members' expectations, but the principles we've covered remain valid and important.

Future AI-CAE content updates will keep you well informed, educated and ready as AI evolves.

Four Strategic Planning Areas:

- Multiple AI Agents
- Adaptive Member Engagement Strategy
- Emerging AI Capabilities Watchlist
- Capability and Governance

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AI Watchlist – What's Emerging in near future?

Multiple AI agents will collaborate and automate tasks with other AI agents to process and complete them.

Adaptive Engagement Strategy is about Keeping your engagement plans flexible. Member's needs and behaviours will change faster, as do the digital platforms they use. Make space in your strategy to revisit assumptions, metrics, and tools regularly.

Several capabilities are especially relevant for associations:

- Natural language understanding could help you read sentiment at scale.
- Generative content tools can automatically craft personalised responses, messages or content suggestions.
- Digital twins may allow you to model experiences based on member profiles and personas.
- Explainable AI will grow in importance—especially when members ask: 'How did you make that decision?'

Capability and Governance Planning for AI success won't just depend on tools—it'll depend on people and policy.

So, it become very important to Upskill your teams.

Involving cross-functional voices in governance.
And adding to your procurement planning.

The AI Adoption Report reveals that only 14% of organisations actively monitor new AI capabilities. That's a gap in future-readiness—and an opportunity for leadership.

Take time to define one future-facing AI initiative you could begin to explore now. Because the best way to prepare for change—is to start planning for it."

Capstone Preparation

AI will continue to evolve—so must your member engagement strategy. This slide helps leaders future-proof decisions, build flexibility, and prepare for continuous value delivery.

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So, AI will continue to evolve—so must your member engagement strategy.

Future-proofing decisions, building flexibility, and preparing for continuous value delivery.

"As you prepare for Module 7 and the final Capstone Strategy, it's good to step back and connect what you've learned about AI and member engagement to your overall organisational strategy.

You've seen examples of how AI can personalise services, flag disengagement, and score engagement behaviours.

Now, think about which of these ideas or may be another idea has the clearest path to impact in your context.

Look for 1–2 use cases that:

- Improve member value
- Align with your systems and priorities
- Could realistically be piloted or expanded over the next 6–12 months without IT efforts and complexities

You'll also want to note any governance, risk, or communication considerations that should be included in your final Capstone plan helping you carry forward the strategic, ethical, and

operational thinking needed to make member engagement a core part of your AI-enabled future."

End of Module 3

V1.3 AI-CAE Module 3: AI & Member Engagement



Well done and congratulations on completing module 3

Be sure to review the tools which also contain additional important information. Each can be tailored by you as and when needed, but each will save you time, money and helps use best practices.

Over the next few months, you can come back and revisit the content here and all the tools.

You've done a great job so far investing in yourself to lead with greater confidence and clarity, see you in Module 4 looking into AI Governance & Leadership.