



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



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01 Introduction: Harnessing AI for membership organisations

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 organisations. 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 streamline 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 organisation.

This guide is here to cut through the complexity and jargon, and provide you with practical, actionable advice tailored specifically to membership organisations. 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 organisation 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: Harnessing AI for membership organisations

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

- Identify areas within your organisation 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 organisation 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 organisations can leverage generative AI—not just for creativity, but to drive real value?



03 Understanding AI - essential terms for membership organisations

AI is transforming the membership sector, but understanding key terms is essential to harnessing 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 organisation.



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.



05 The art of the possible

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