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From “We Want AI” to a Real Use Case

Scope — and commit to measuring — your first AI use case before you build anything.

FOLLOWING THE WEBINAR

Measuring the Impact of AI in Associations: [Moving from Experimentation to Organizational Value](#)

The organizations that get the most out of AI don't start with the technology — they start with a problem worth solving. Work through this as a team: the conversation matters as much as the answers.

HOW TO USE IT

Pick one pain point and answer all four questions for it. If you can't answer a question yet, that's a finding — note it, and decide who will get the answer.

THREE AREAS OF IMPACT

First, decide what you're trying to impact

Most teams can move the needle in one of three areas. Start where you can actually measure today.

1

Operational Efficiency

The most concrete starting point. If you can't measure anything else yet, start here.

PROBLEM	Staff spend significant time answering repetitive member questions.
SUCCESS	Fewer inbound emails and calls on topics the AI can handle — staff deflection.
MEASURE	Volume of repeat queries before vs. after deployment; staff hours saved.
OWNER	Operations, member services, or the team managing the AI tool.

50%

fewer support tickets — a first for the organization

1 hr vs. 12

to draft a set of exam questions

2

Member Experience & Retention

Harder to measure, but increasingly vital — engagement is the sector's #1 challenge.

PROBLEM	Members can't find what they need; staff can't tell who's engaged and who's at risk.
SUCCESS	Members self-serve successfully; engagement signals improve.
MEASURE	Session depth, search-to-answer rate, return usage, survey feedback on ease of finding information.
OWNER	Membership team, digital team, or customer success.

KEY INSIGHT — DX DATA

Only **10%** of associations currently use AI to enhance member experience, and just **3%** offer member-facing AI tools — a real early-mover advantage for those willing to connect AI to member-facing surfaces.

3

Revenue

Often what leadership cares about most — and more measurable than it seems.

PROBLEM	Limited visibility into what drives conversions; hard to connect engagement to revenue outcomes.
SUCCESS	AI surfaces high-intent users and prompts timely, informed follow-up; you begin tying engagement to conversions.
MEASURE	Conversions attributed to Betty interactions (GTM/UTM); engagement-to-conversion rate; influenced revenue.
OWNER	Marketing, sales, or membership — ideally with shared visibility across teams.

KEY MESSAGE

You don't need a fully mature AI strategy to start seeing revenue impact. Even early on, you can track and attribute real outcomes by connecting user engagement to conversion signals.

Once you know what you're trying to impact, the question becomes: where do you start — and what's standing in the way?

SCOPE ONE USE CASE

Now pin down a single use case

01 Start with the pain, not the technology

Not “we want to use AI” — what is the actual pain point you’re trying to solve?

Which fits? Tap to select, then describe it in your own words.

Staff capacity

Member self-service

Content findability

Something else

Describe the pain concretely: who feels it, how often, and what it costs you today.

02 Define what success looks like

In plain language, what’s the outcome? Finish the sentence: “We’ll know this worked when...”

“Members find answers faster.”

“Staff spend less time on repetitive questions.”

“Renewal rates improve among digitally engaged members.”

03 Decide how you’ll measure it

If you can’t measure it, you can’t tell whether it worked. Fill in all three columns.

WHAT’S THE METRIC?	WHERE DOES IT LIVE?	BASELINE TODAY?

Tip: if the baseline is “we don’t track that today,” your first task is to start capturing it.

04 Name who owns it

Measurement without ownership dies. Not a committee — a person.

Owner (name)

Who tracks and reports on this?

Backup

Who covers when the owner is out?

Reports to — and how often

Who do they share progress with?

First check-in date

When will you first look at the numbers?



✓ Pull it together

Use your four answers to complete one clear sentence you can carry into a kickoff or leadership conversation:

We're solving [pain point] so that [success outcome], measured by [metric], and owned by [name].

YOUR SENTENCE

Write yours here...

Scoped your use case and want a second set of eyes? We'll help you pressure-test the metric and baseline before you build.



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