



CASE STUDY:

Large Healthcare Association Translates Customer Commentary into Industry Leadership, Renewals & Revenue

GOAL

Gain a 360° view of members and customers to enable data-informed decision making across departments to meet strategic industry, membership, and revenue goals.

A >20,000-member healthcare professional organization serving a diverse membership base wanted to examine open-ended feedback in educational course evaluations and various surveys to uncover insights to guide future programming and improve its offerings.

CHALLENGE

Insight-rich data was spread across multiple sources and departmental siloes, requiring a **systematic and efficient** method to examine a wide variety of data holistically across the organization. Senior leadership wanted to better understand the diverse needs of members and customers in order to deliver high-quality content and demonstrate industry leadership—particularly to appeal to a key segment that had grown unresponsive.

SOLUTION

Leverage ORI's cutting-edge *Insights2Action* advanced text analytics to quickly mine, segment, and analyze open-ended customer commentary to detect themes, sentiment, and effort to strengthen understanding of member and customer behavior and preferences.

- In a matter of weeks, ORI analyzed large volumes of open-ended survey feedback (text) that had previously required months of manual coding by numerous association staff members. We used **AI-driven natural language processing (NLP)** technology with:
 - **Strategy and goal-mapping** to integrate the questions that needed to be answered with the data needed to answer them.
 - **Omni-source capabilities** to conduct analysis across multiple data sources (educational course evaluations, research survey on industry professional practices, membership survey with responses to new industry guidelines, and annual convention survey).
 - **Theme detection** to identify primary conversation topics regarding member wants, needs, interests, and pain points.
 - **Sentiment and level of effort (LOE) analysis by segment** to understand member and customer needs at various stages in their relationship with the client and according to different demographic criteria.

Analyzed Data to Achieve Association Goals:

- Boost non-dues revenue
- Strengthen membership value
- Increase retention
- Incorporate member feedback to improve offerings
- Inform education strategy
- Grow convention attendance
- Develop valuable thought leadership materials



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- **Behavior analysis** to assess industry practices among professionals and understand the “why” and “how” behind them—laying the foundation for future research and programming.

OUTCOMES

ORI translated member and customer commentary into actionable insights, enabling quick response to reduce member frustration, inform decision making for new and existing offerings, boost retention, enrich member experience, and strengthen the association’s position as an industry thought leader.

- Surfaced participant frustrations and desired content topics to **guide development of educational resources and adjust courses to drive enrollment** in the association’s largest source of non-dues revenue.
- Uncovered concern within a key member segment regarding how to approach a sensitive but critical medical situation for high-risk patients, prompting the client to **produce an educational video to unveil at the annual convention** to address the issue and raise awareness.
- Identified factors unique to various segments that **drive annual convention attendance and participant retention**, enabling the client to engage in targeted outreach and strategic convention design.

“AI seemed overwhelming at first, but getting bogged down in the ‘old way’ of doing things was truly challenging. Working with ORI allowed us to gain the insights we needed quickly.”

- Vice President

FREE EVALUATION

Is *Insights2Action* a fit for your association?

Schedule a 15-minute ROI evaluation—no obligation

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