

# MatrixMaxx 24.2 Overview Session Summary

## Introduction and Logistics (00:00:21)

- **Speaker:** Tanya Kennedy Luminati welcomed attendees and provided a light-hearted intro referencing the opening slide.
- MatrixMaxx 24.2 launched recently with positive initial feedback.
- Session logistics:
  - The meeting is recorded and will be available in the Support Center for broader access.
  - Primary presenters: Joanna, Janet, and Tanya, with contributions from other MatrixMaxx team members.

## Key Release Focus: Insights and Engagement via AI (00:02:11)

- **Summary:** The release emphasizes insights and engagement tools, leveraging AI for enhanced user interaction.
- New features like AI-powered reports are introduced, aimed at utilizing membership data more effectively.
- Highlights:
  - Tools will be available on a trial basis with an opt-in approach.
  - Integration with OpenAI ensures data confidentiality and compliance.
  - Future pricing will reflect database size and user volume.

## AI-Powered Features in MatrixMaxx (00:11:13)

### Organization Engagement Summary (00:11:13)

- **Location:** Accessible via an AI button on the organization profile.
- **Functionality:**
  - Summarizes participation, financial contributions, and committee involvement.
  - Identifies trends like engagement increases or decreases.
  - Employs prompts engineered for accuracy and relevance.
  - Cache mechanism ensures refreshed insights without frequent API calls.

### Individual Engagement Summary (00:32:41)

- **Location:** Available on individual profiles.
- **Functionality:**
  - Provides a concise view of a person's engagement, including memberships and committee roles.

- Highlights key contact changes and their impact on engagement.

## Meeting Insights (00:38:12)

- **Location:** Meeting profiles under "Tell Me About This Meeting" (AI-generated summary).
- **Functionality:**
  - Summarizes attendance, registration patterns, and financial data.
  - Feedback-driven iterations will improve report utility over time.

## Non-AI Enhancements Inspired by AI Brainstorming (00:20:00)

### Staff Engagement Report (00:20:00)

- **New Feature:** Identifies the top 10 most engaged staff members at an organization.
- **Scoring Metrics:** Committee roles, meeting attendance, and digital engagement.
- **Future Plans:** Potential for customizable scoring mechanisms and export features.

### Committee Participation Insights (00:26:00)

- **Enhancement:** "Stats at a Glance" added to the Committee Participation report.
  - Highlights gaps in participation and counts of unique individuals engaged.
  - Allows quick assessment of organizational representation.

### Substitution Summary Report (00:41:00)

- **New Report:** Tracks registration substitutions for events, showing replacements in one consolidated view.
- **Use Case:** Addresses client needs for detailed tracking of attendee changes.

## Additional System Enhancements (00:45:00)

- **Membership Module:**
  - Override options added for invoice fine print, company name, and address.
- **Sponsorship Module:**
  - Total raised amount displayed prominently at the top of sponsorship profiles.
- **Integration:**
  - New integration with Axios HQ, an AI-driven communication platform.
- **Organizations with Similar Names Report:**
  - Clearly flags inactive or out-of-business organizations to streamline record merging.

## Looking Ahead: AI Expansion and Workshops (00:48:39)

- **Future of AI in MatrixMaxx:**
  - AI-powered chatbots trained on client data for improved customer interactions.
  - Exploration of data supplementation for deeper membership insights.
- **Workshops:**
  - AI Readiness Workshops: Introduce teams to AI tools and policies.
  - Custom GPT Creation: Tailored solutions for specific tasks like note-taking.
- **AI Cohort:**
  - A 10-week program designed to help teams integrate AI tools into their workflows effectively.

## **Closing and Next Steps (00:53:00)**

- Attendees encouraged to trial the AI features and provide feedback.
- MatrixMaxx team remains open to enhancement suggestions and custom feature requests.
- Monthly Q&A sessions with Jana provide opportunities for further learning and exploration.

**Thank you for participating in the MatrixMaxx 24.2 session!**