

# Virtual Volunteers: Scaling Chapter Member Support with AI—Without Losing the Human Touch

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PMI Culture Value: Aim Higher

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# Learning Objectives

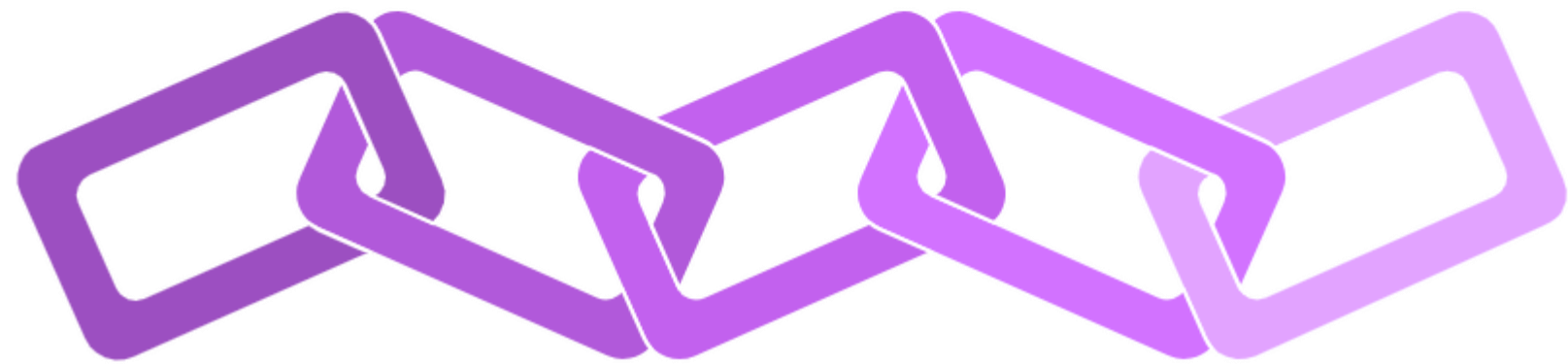
At the conclusion of the session, attendees will be able to:

- Describe how “Virtual Volunteers” (AI-supported chatbots) can improve chapter operations and member support while preserving appropriate human escalation and oversight;
- Draft a lightweight knowledge-based chatbot architecture using a structured information repository (e.g., a maintained FAQ/knowledge sheet) to enable accurate, consistent responses; and
- Create a straightforward multi-channel rollout plan (website + messaging platforms such as WhatsApp/Telegram) that improves response time, accessibility, and member satisfaction.

# What You'll Leave With

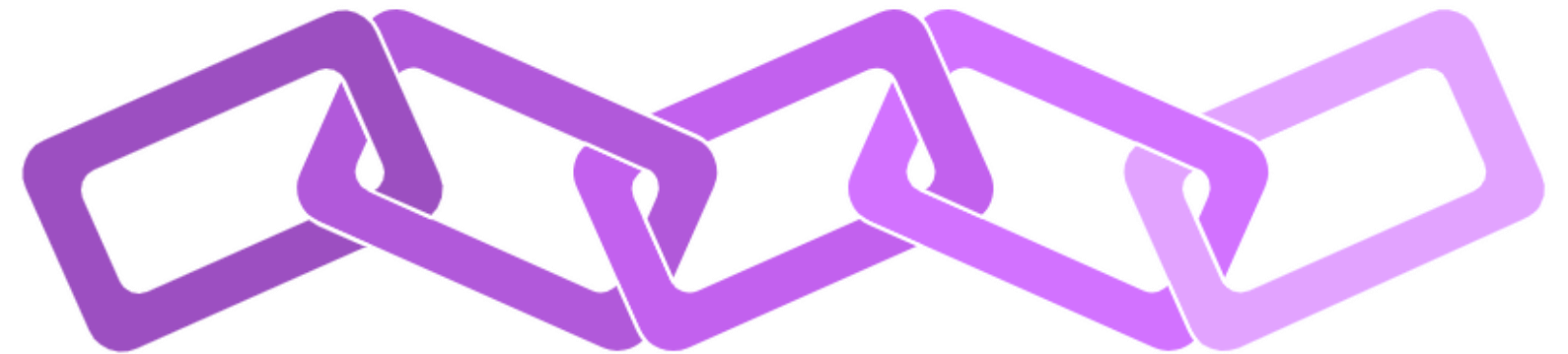
## What This Session Covers

First-Response Layer  
Volunteer Workload Reduction  
Chatbot Architecture  
Multi-Channel Pilot  
Governance and Metrics



## What This Is *Not*

Technical Session  
Human Volunteers  
Enterprise Transformation  
Safeguarded Automation  
Chapter Mandate



# Why This Topic Matters Now

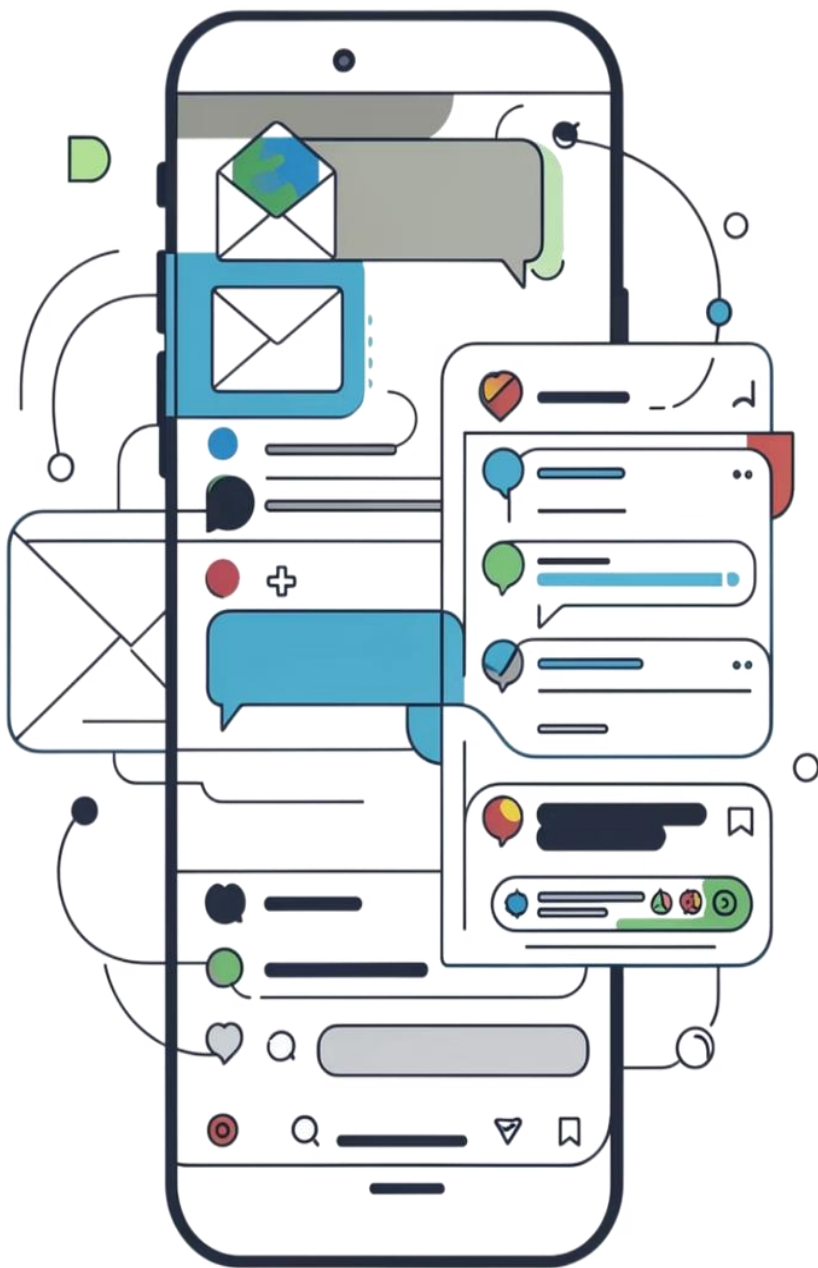


Chapters are growing — more events, trainings, and member activities. Member queries arrive across email, website, WhatsApp, LinkedIn, and event platforms. **Volunteer capacity does not automatically grow at the same pace.**

# The Chapter Support Challenge

## Member Queries Come From Everywhere

## Operational Impact



Email and Forms

WhatsApp Groups

LinkedIn Messages

Event Platforms

Board Messages

Personal Calls

No Single Source of Truth

Repeated Answers

Delayed Replies

Inconsistent Answers

Hesitant Volunteers

Board Member Helpdesks

# Volunteer Burnout Is Often Invisible

## Burnout Symptoms in Chapter Environments



## Root Causes to Solve



**Burnout does not happen because volunteers do not care — it happens when systems do not support their care.**

# The Hidden Workload Behind Member Support

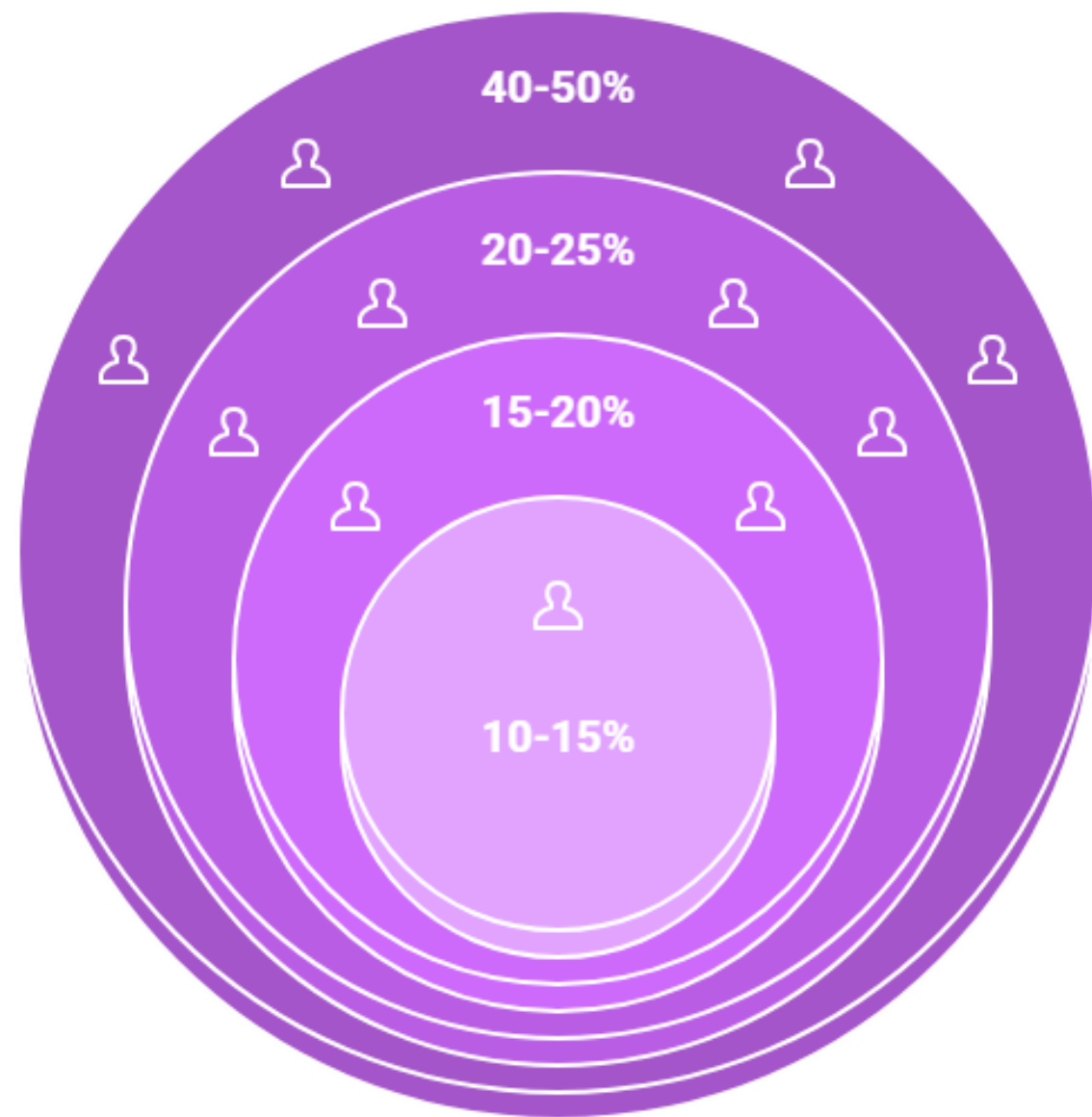
## Where Volunteer Time Goes

Illustrative workload pattern for a support-heavy volunteer portfolio.

- 40–50% — Answering repetitive queries
- 20–25% — Coordination & follow-ups
- 15–20% — Event execution support
- 10–15% — Strategic initiatives



The Volunteer Management Progress Report notes that volunteer leaders wear many hats across policy, training, recruitment, supervision, data, partnership, and change management. Of 21 tasks, **17 were the responsibility of at least half of respondents.** Reducing repeated support questions can release scarce volunteer time for leadership and engagement.



Repetitive  
Queries

Coordination &  
Follow-ups

Event Execution  
Support

Strategic  
Initiatives

# Top Repetitive Member Queries

## Events & Logistics



Register for the Event



Find Joining Link



Determine Event Format



Check Session Start Time



Inquire About Certificate



Locate Recordings/Resources

## PDUs & Certification



Renew Membership



Join Chapter



Chapter Benefits



Volunteer



Open Roles



Contact Information

## Membership & Volunteering



PDU Quantity



Claiming PDUs



Upload Timing



Activity ID

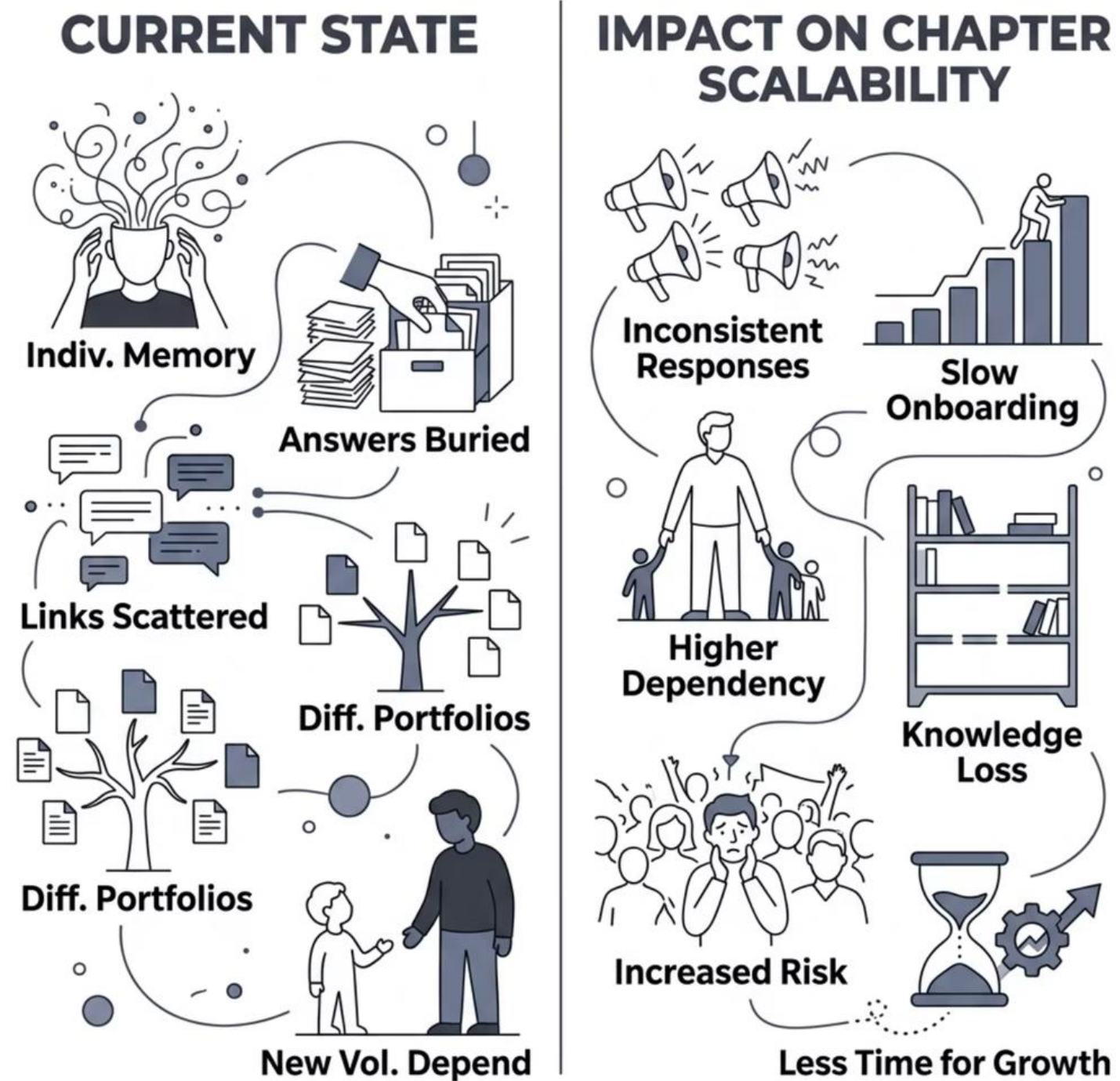


Guidance Location



Training Contact

# Knowledge Gap: When Answers Live in People



## The Core Problem

When chapter knowledge lives only in people, scale is limited. Board transitions, volunteer turnover, and event pressure expose the fragility of undocumented processes.

If knowledge lives in a system, scale becomes possible — and new volunteers can contribute confidently from day one.

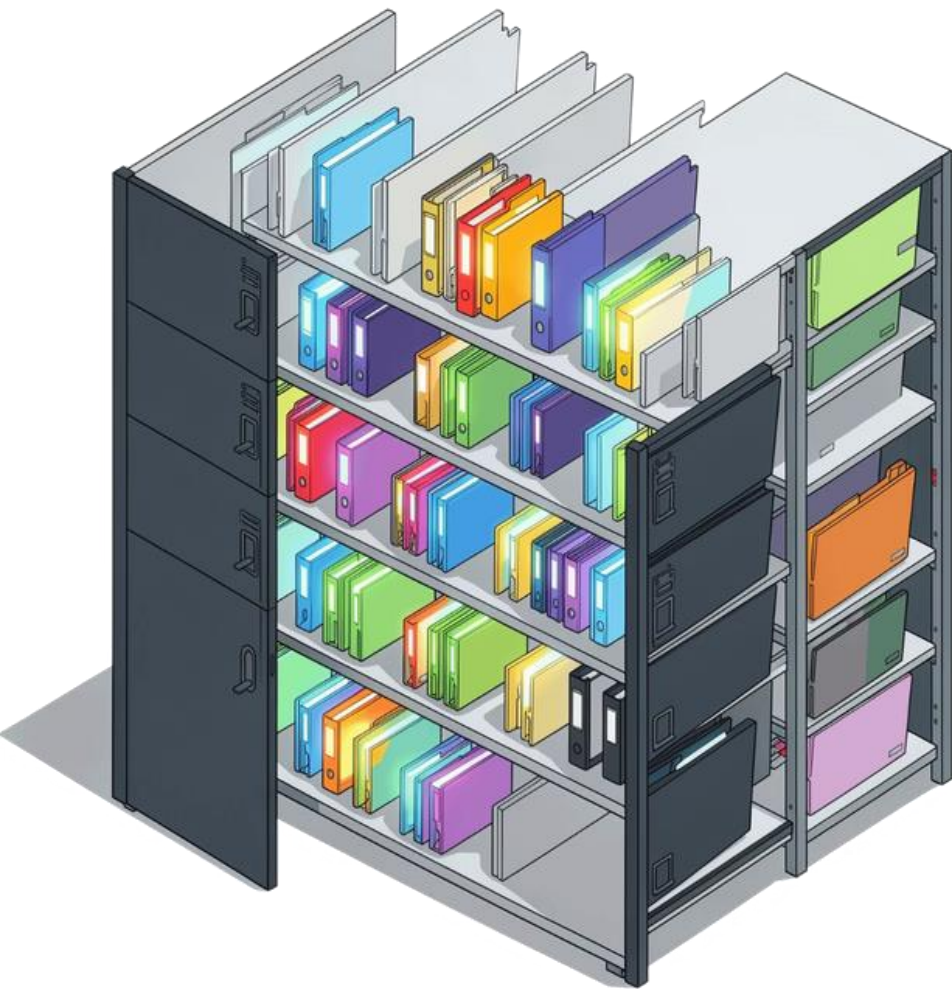
# Member Experience Impact

Member experience is shaped by every small support interaction, not only the event itself. When support is slow or inconsistent, trust erodes — and volunteers spend time clarifying instead of leading.

**Research insight:** 68% of teams using AI chatbots saw reduced call/email volume. 64% of agents with chatbots focus mostly on complex issues — versus 50% without. *(Salesforce State of Service)*



# The Opportunity: Standardize, Support, Scale



This is the moment to shift how your chapter operates — from reactive, person-dependent support to a structured, governed system that scales.

**From "who can answer this?"**

To "where is the approved answer?"

**From scattered messages**

To a governed knowledge system

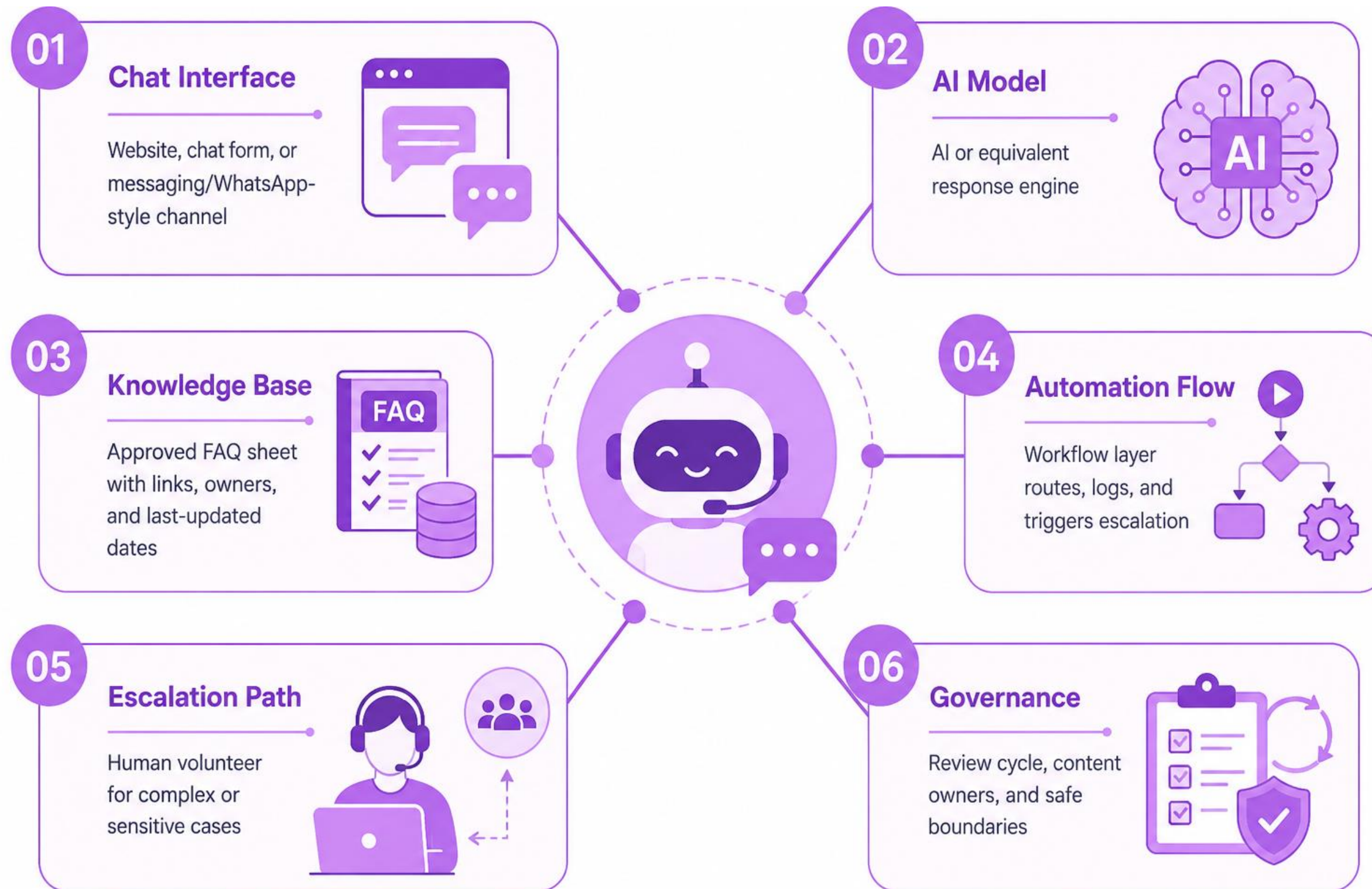
**From always-on dependency**

To a structured first-response layer

# What Are Virtual Volunteers?

SOLUTION

A Virtual Volunteer is an AI-supported chatbot connected to a structured chapter knowledge base that provides instant answers to common member questions and escalates complex or sensitive needs to human volunteers.



HUMAN  
TOUCH

# Human-Led. AI-Supported.

The bot becomes the first-response layer. Human volunteers remain the trust layer.

**Escalation is not a failure of automation — it is responsible design.**

## Bot Handles

*Routine, factual, repeatable questions*



Event FAQs



PDU Guidance



Membership  
Direction



Volunteer  
Forms



Contact  
Points

## Human Volunteers Handle

*Judgment, empathy, and authority*



Conflict  
Resolution



Financial  
Matters



Data Privacy



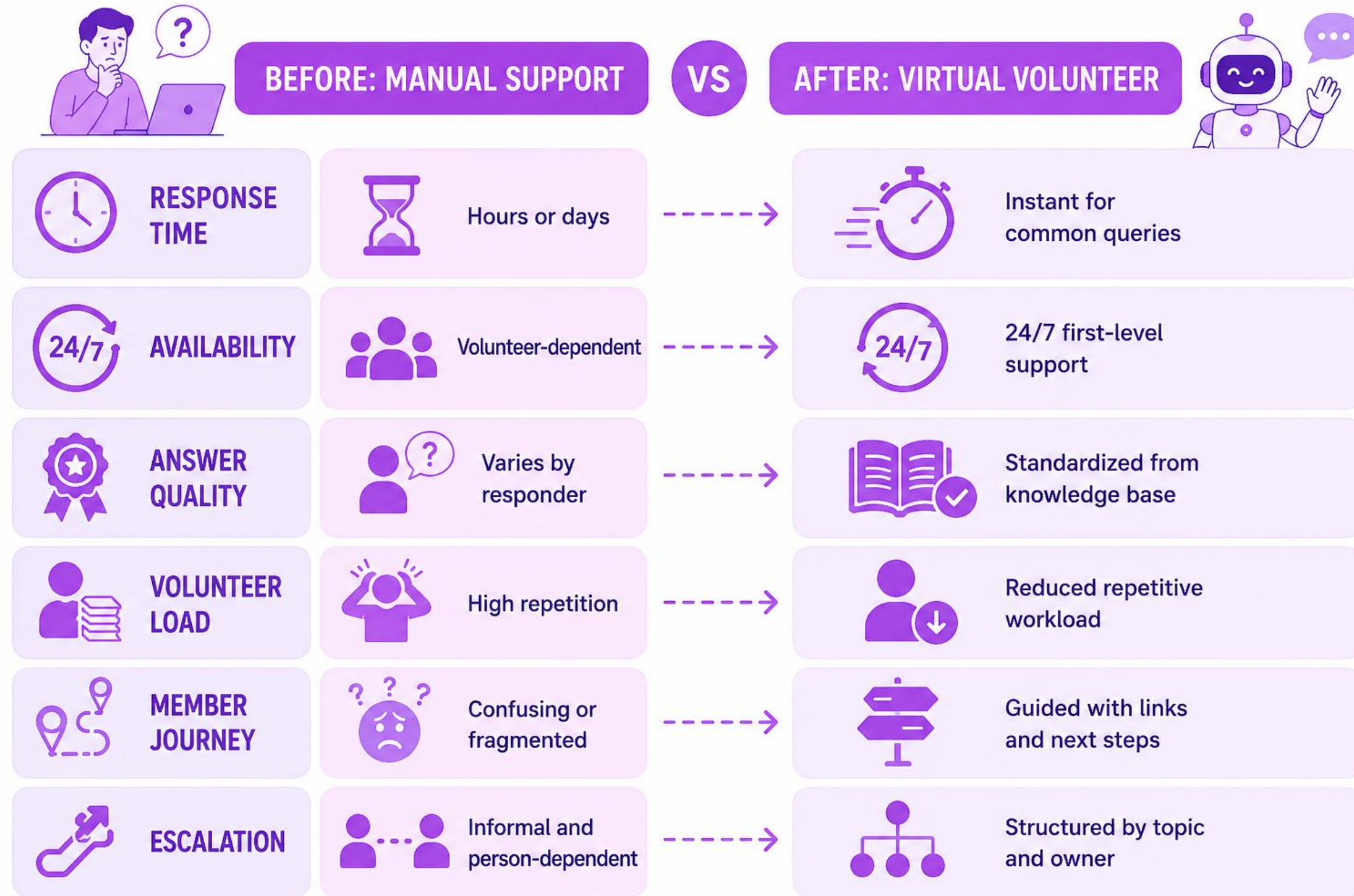
Partnership  
Discussions



Leadership  
Development

# Before vs. After Transformation

The goal is not to automate the chapter. The goal is to automate repeated friction.



# Use Cases for PMI Chapters



## MEMBERSHIP SUPPORT



Renewal guidance and joining process



Member benefits and profile updates



Standard membership contacts



## EVENT SUPPORT



Registration links, dates, venue



Speaker details and joining links



Certificates and recordings



## PDU SUPPORT



PDU eligibility and how to claim



Activity ID and CCRS guidance



Escalation to PDU support lead



## VOLUNTEERING SUPPORT



Interest forms and role categories



Time commitment and onboarding



Contact to volunteering lead



## TRAINING & CERTIFICATION



PMP session info and learning resources

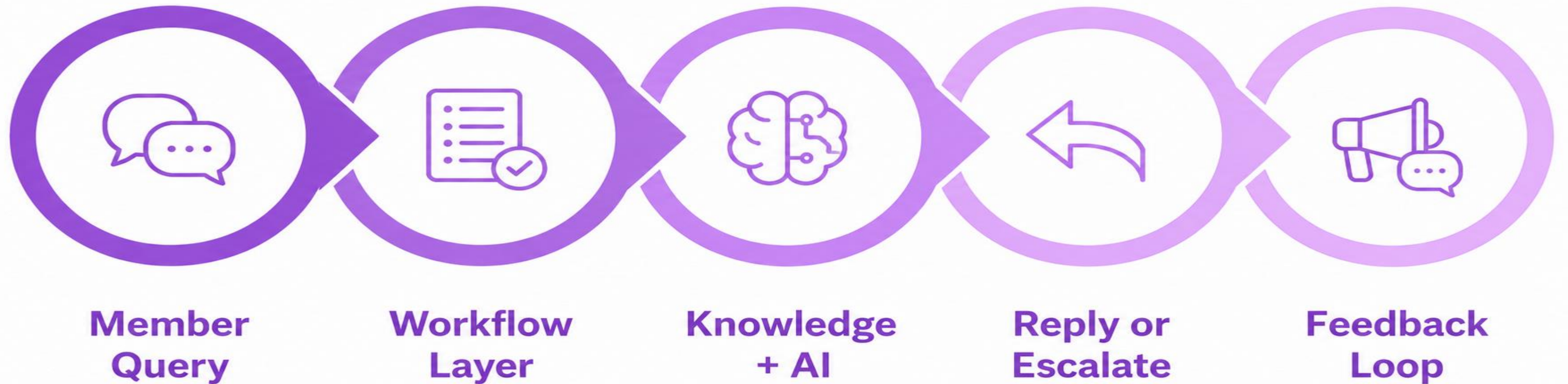


Training portfolio contact



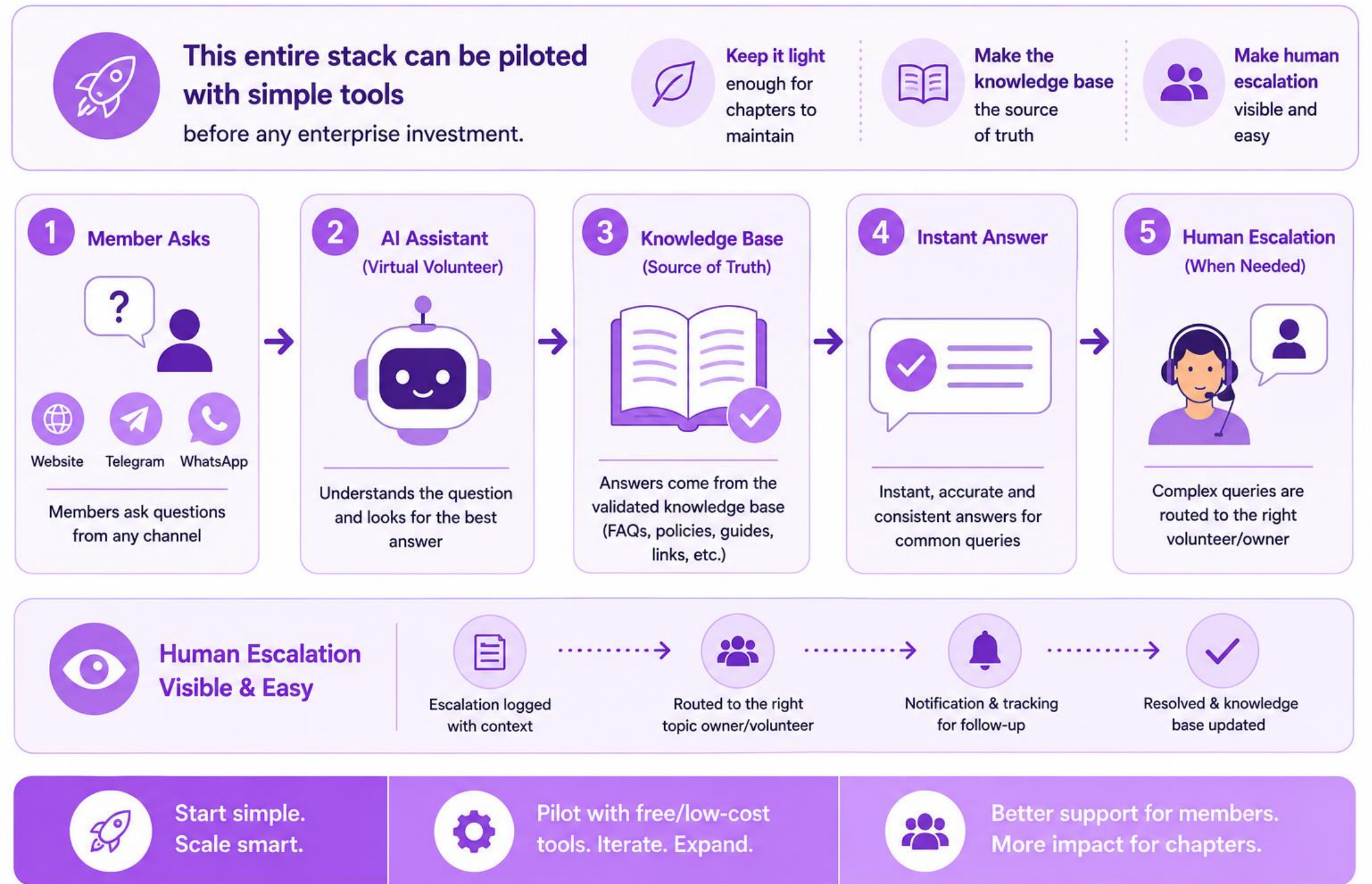
Mentoring direction and session alerts

# Operating Model: From Query to Resolution



The chatbot uses approved content from the knowledge base — it doesn't "know everything." the workflow layer acts as the conductor, connecting input, knowledge, AI, logging, and escalation. Unanswered questions become new FAQ entries, making the system smarter over time.

# Category- Generic Pilot Architecture



## User Access

Website · QR Code · Messaging Bot

## Human Escalation

Portfolio owner · Volunteer lead · Board contact

## Automation Layer

Workflow layer: routing, logging, escalation

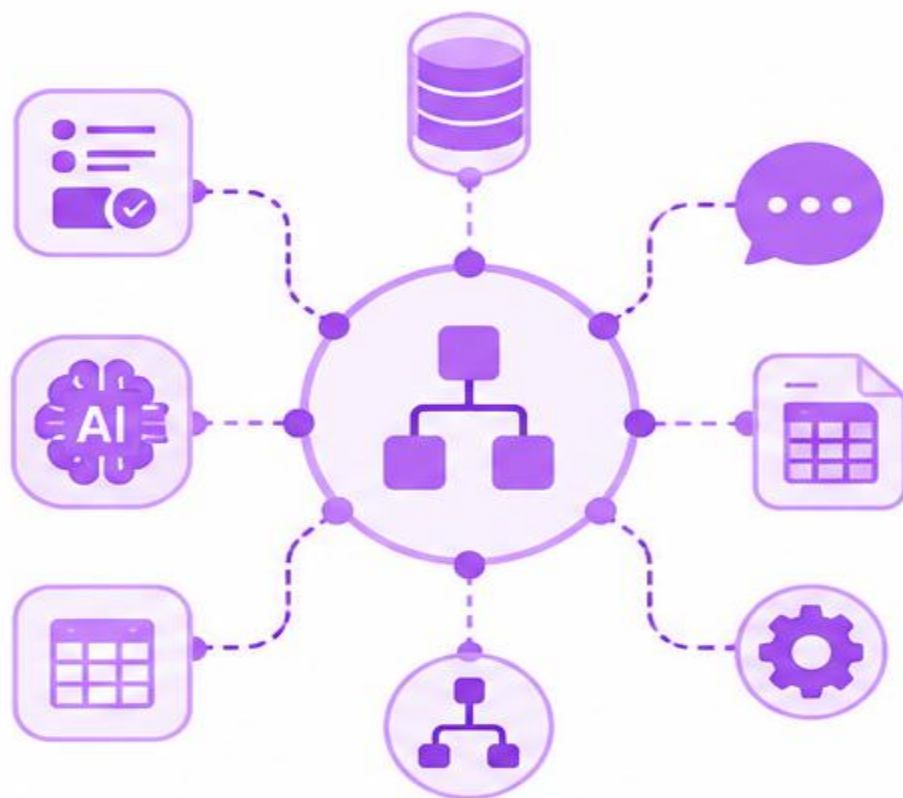
## Knowledge Layer

FAQ Sheet / Notion / SharePoint

## AI Layer

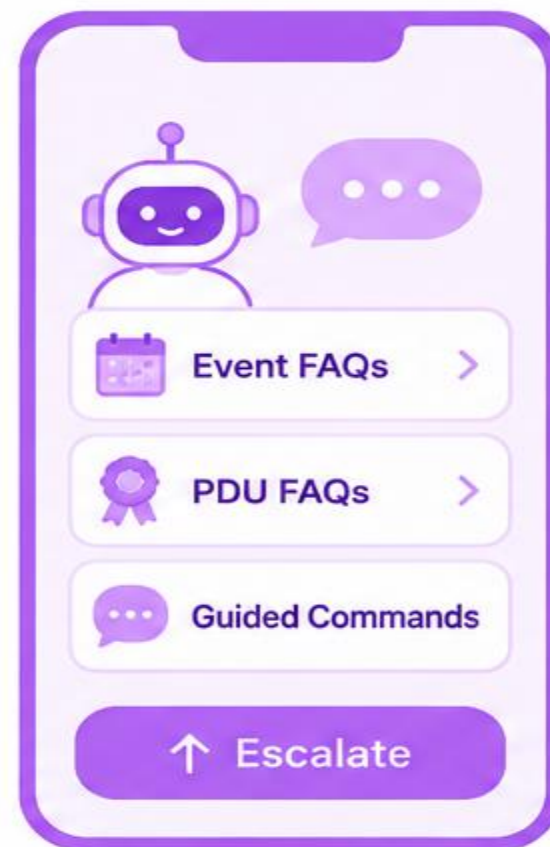
AI response engine — controlled, governed response

# Why This Tool Stack?



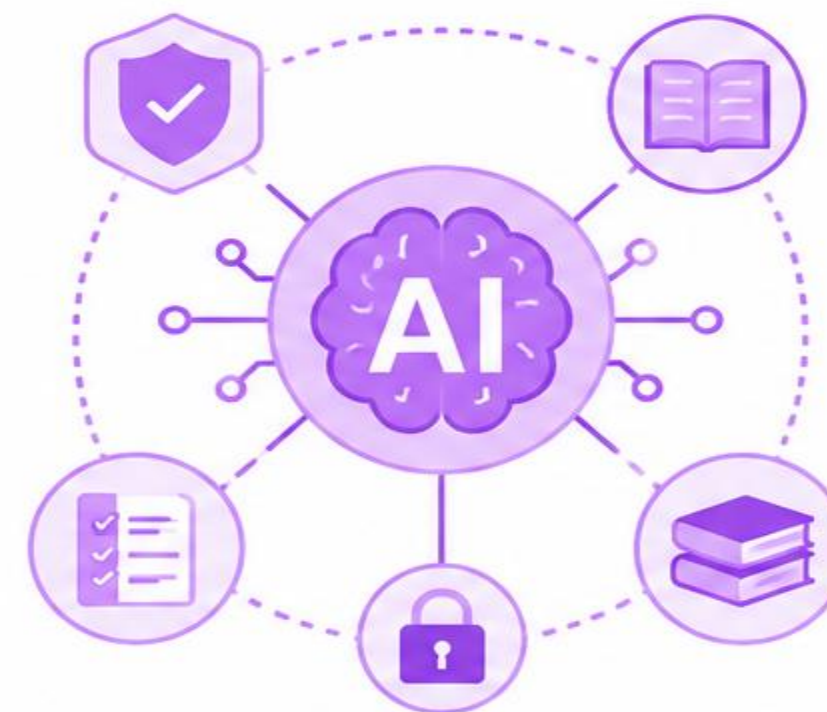
## Workflow Automation Layer

Workflow platform connecting forms, AI, spreadsheets, and messaging. Handles routing, logging, branching, and debugging.



## Messaging or Web Bot — Member Interface

Mobile or web interface for event/PDU FAQs, guided commands, and escalation triggers.




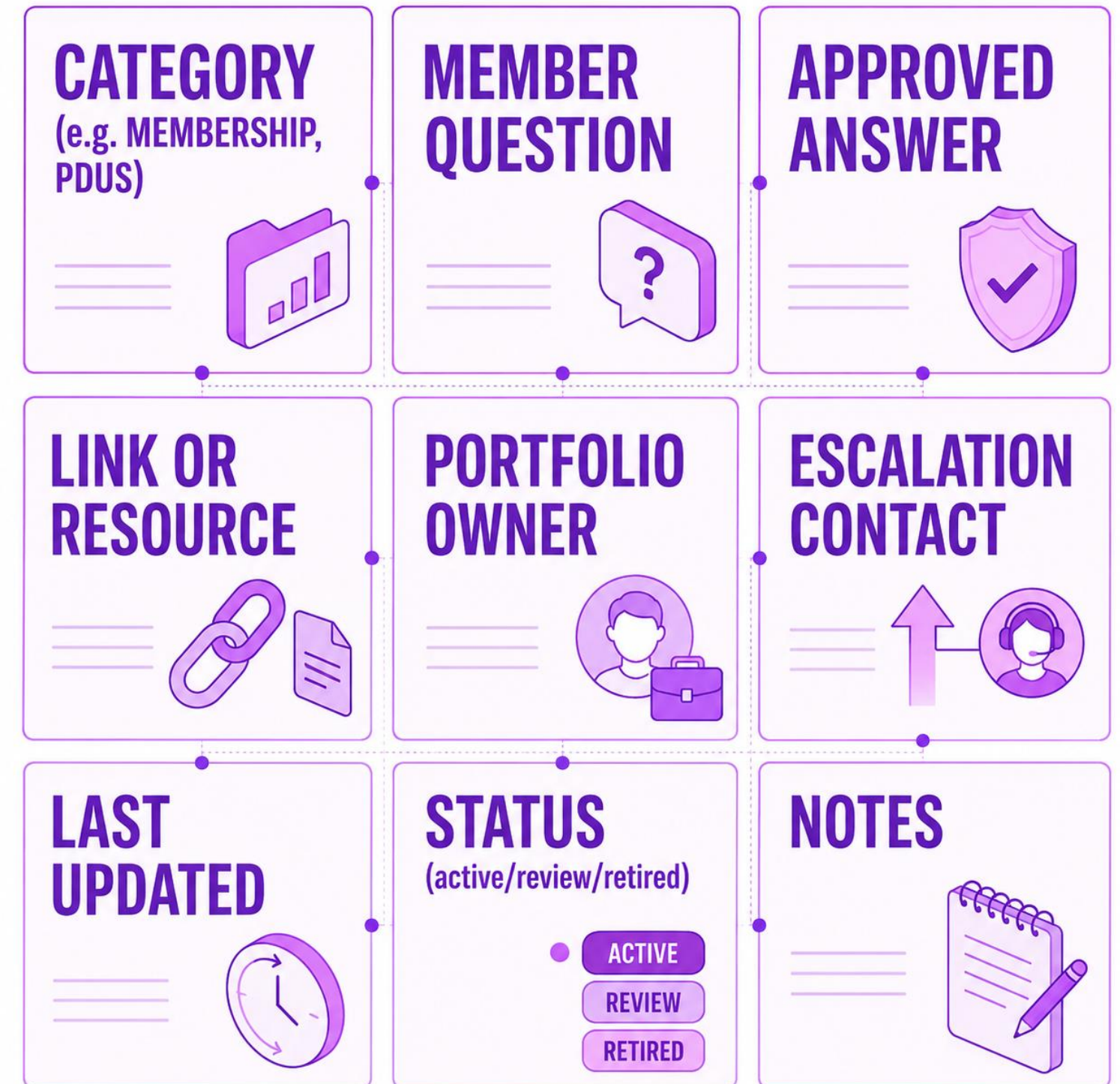
## AI Response Engine

A selected AI or rules-based response engine using approved FAQ guardrails and chapter-owned knowledge.

# Knowledge Base Is the Heart

The chatbot is only the access layer — the **knowledge base is the real chapter asset**. AI without structured knowledge creates risk. AI with governed knowledge creates scale. Start with a spreadsheet before investing in advanced tools.


 The quality of the chatbot depends directly on the quality and freshness of the knowledge base.




# Sample Knowledge Base Entries


Convert repeated member questions into approved, owned, and reviewable answers.


## PDU Query

 **Q:** How do I claim PDUs after a chapter event?


 **A:** PDUs may be auto-reported for eligible chapter events. If manual reporting is needed, use the activity details shared in the event communication.


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 **Owner:**  
Training or Events portfolio


 **Escalation:**  
PDU support volunteer


## Volunteer Query

 **Q:** How can I volunteer with the chapter?

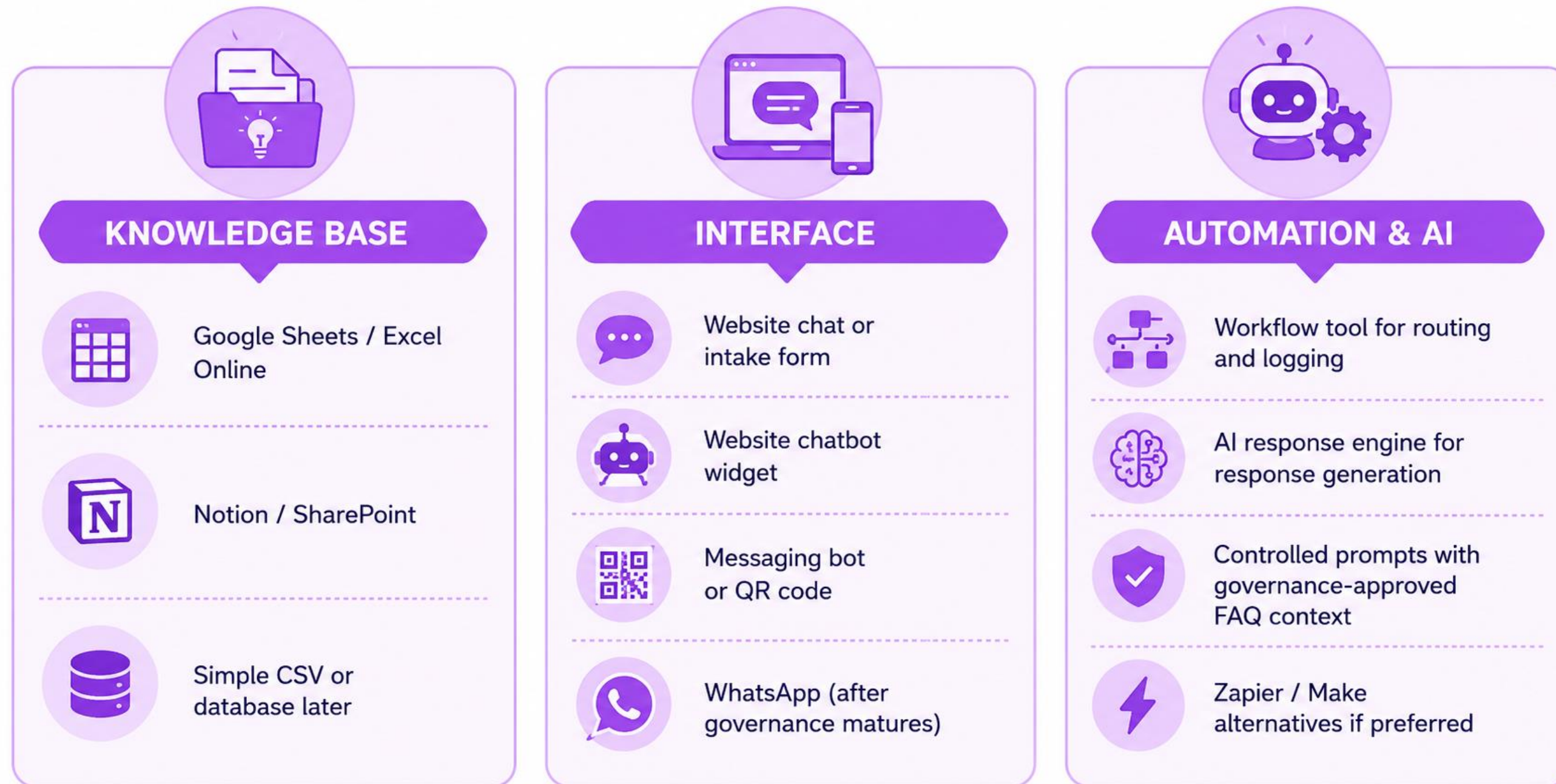
 **A:** Express interest through the chapter volunteer form. Opportunities may include events, communications, training, outreach, technology, and member engagement.

---

 **Owner:**  
Volunteering portfolio

 **Escalation:**  
VP / Director of Volunteering

# Low-Cost Implementation Options



**Selection principle:** Start with the simplest tool your volunteers can maintain. Do not over-engineer the pilot. Scale only after response quality is stable.

# Multi-Channel Rollout Plan



**i** Keep the same approved answers and escalation rules across all channels.

# 30–60–90 Day Pilot Blueprint

## Days 1–30: Prepare

Identify top 20–30 repeated questions. Build FAQ sheet. Assign portfolio owners. Select one pilot channel. Design the workflow route. Define escalation criteria.

1

2

3

## Days 61–90: Scale

Launch messaging or web bot. Add QR codes to events. Track usage and unresolved questions. Review escalation logs. Decide go/no-go for wider rollout.

## Days 31–60: Pilot

Deploy Website chat or intake form. Connect a governed response engine. Test with board and volunteers. Refine inaccurate answers. Log escalations.

**Do not start with a perfect bot. Start with a governed pilot.** Governance is what makes the system trustworthy — monthly FAQ reviews, clear escalation paths, and version-controlled knowledge are non-negotiable.














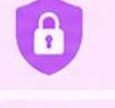





# Governance Model

**i** Good governance isn't red tape — it's the foundation of a system people can trust.



CORE PRACTICES	
	01 Review and refresh FAQs every month
	02 Conduct a quarterly governance health check
	03 Maintain a version-controlled knowledge base
	04 Define a clear escalation path for every category
	05 Never store sensitive data without explicit approval
	06 Test all workflows before every event

























# Escalation Matrix: Bot vs. Human

  <b>BOT CAN ANSWER</b>	  <b>ESCALATE TO HUMAN</b>
 Event date, time, and location	 Complaints or grievances
 Registration and joining links	 Refund requests
 Standard PDU guidance	 Sponsorship proposals
 Volunteer form links	 Partnership discussions
 Public membership info	 Personal data issues
 General chapter contacts	 Policy exceptions
 FAQ-based directional support	 Conflict or member dissatisfaction
	 Anything requiring empathy or authority

"I can provide general guidance, but this request needs a chapter volunteer."

# Risk-Aware Implementation

## AI SYSTEM RISKS & SOLUTIONS

1		<p><b>Wrong AI Answer</b></p>		<p>Restrict to approved KB; review samples monthly</p>																					
2		<p><b>Outdated Answer</b></p>		<p>Monthly content review with last-updated field</p>																					
3		<p><b>Automation Error</b></p>		<p>Test workflows before launch; use logs</p>																					
4		<p><b>Data Exposure</b></p>		<p>Avoid collecting personal data; limit storage</p>																					
5		<p><b>Bot Hallucination</b></p>		<p>Use controlled prompts and FAQ context</p>																					
6		<p><b>Low Adoption</b></p>		<p>Promote via QR codes, events, newsletters</p>																					
7		<p><b>Volunteer Resistance</b></p>		<p>Position as support, not replacement</p>																					
8		<p><b>Poor Escalation</b></p>		<table border="1" style="font-size: 8px;"> <thead> <tr> <th>Data Set</th> <th>Owner</th> <th>SLA</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>Customer PII</td> <td>Sarah T.</td> <td>&lt; 4 hrs</td> <td>Met</td> </tr> <tr> <td>Financial Data</td> <td>John O.</td> <td>&lt; 2 hrs</td> <td>Warning</td> </tr> <tr> <td>Product Info</td> <td>Marketing</td> <td>&lt; 8 hrs</td> <td>Met</td> </tr> <tr> <td>System Logs</td> <td>IT Ops</td> <td>&lt; 1 hr</td> <td>Critical</td> </tr> </tbody> </table>	Data Set	Owner	SLA	Status	Customer PII	Sarah T.	< 4 hrs	Met	Financial Data	John O.	< 2 hrs	Warning	Product Info	Marketing	< 8 hrs	Met	System Logs	IT Ops	< 1 hr	Critical	<p>Define owner and SLA per category</p> 
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AI governance does not need to be complicated — but it must be intentional.

# What Not to Automate

## AI USE POLICIES: BEST PRACTICES

### ⊗ Do Not Fully Automate

Complaints and grievances



Complaints and grievances

Financial disputes and refund decisions



Financial disputes and refund decisions

Sensitive personal



Sensitive personal details

Sponsorship negotiation



Sponsorship negotiation

Board decisions and policy exceptions



Board decisions and policy exceptions

Conflict handling and ethical concerns



Conflict handling and ethical concerns

### ✓ Use AI For

Standard answers and FAQs



Standard answers and FAQs

Directional guidance and useful links




Directional guidance and useful links

First-level triage and status routing



First-level triage and status routing

First-level triage and status routing




First-level triage and status routing

Escalation preparation



Escalation preparation

Capturing repeated questions



Capturing repeated questions


Responsible AI is about knowing what should be escalated — not answering everything.


# Interactive Demo: Test the Idea





# Sample Chatbot Conversations


## PDU Support Example

 How do I claim PDUs for yesterday's session?


 PDUs may be auto-reported for eligible chapter events. 🔄 If manual reporting is required, please is the activity details shared in the event email. ✉️.


 I don't have the activity ID.


 I can connect you to the PDU support volunteer. 🎧. Please share the event name and date.  📅.


 → **Escalation:** route to Training / Events portfolio


## Volunteering Example

 I want to volunteer with the chapter. What should I do?

 Wonderful. 🙌 You can express interest through the chapter volunteer form. 📄. Opportunities may include: 📅 events 🗣️, communications 🧑‍🎓, training 🏠, outreach 📱, technology 🖥️, and member engagement 👥.

 How much time is required?

 Time commitment varies by role. Short-term roles may need a few hours around an event. 📅. Ongoing roles may need regular weekly involvement. 📅. Would you like role categories? 📋.

 → **Escalation:** route leadership role questions to volunteering portfolio

# Minimum Viable Virtual Volunteer

Start narrow. Learn fast. Scale responsibly.

## Minimum Pilot Scope

- 20 approved FAQs + one knowledge sheet
- One channel, one workflow tool workflow
- AI response engine with controlled prompt
- One escalation route
- One monthly review meeting
- One dashboard or tracking sheet

## Avoid in First Pilot

- Sensitive complaints, refunds, disputes, or policy exceptions
- Complaints or financial disputes
- Complex policy interpretation
- Personal member data
- Board-level decisions
- Scenarios requiring empathy or authority

# Key Takeaways + APA References

## Takeaways



### Virtual Volunteers Improve Efficiency

Virtual volunteers enhance speed, consistency, and accessibility



### Knowledge Base is Crucial

The knowledge base is more important than chatbot tools



### Human Escalation Protects Trust

Human escalation maintains trust, empathy, and governance



### Practical Pilot Stack Creation

A knowledge base, workflow layer, and response engine form a pilot stack



### Start Small and Scale

Begin with a small pilot, govern well, measure impact, and then scale

## APA References

- 1.Center for Effective Philanthropy. (2024). State of nonprofits 2024: What funders need to know.
- 2.Independent Sector & Do Good Institute. (2025). Value of volunteer time.
- 3.Salesforce Research. (n.d.). State of service: Third edition.
- 4.Salesforce. (2022). What is a chatbot and how is it changing customer experience?
- 5.References support the cited CEP, volunteer-value, and chatbot/service data.
- 6.Use the QR/demo assets from the session to localize the pilot.

**Scale support with technology. Preserve trust with people. Human-led. AI-supported. Member-focused.**

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