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TRIPS Role Task Decomposition Report

AI Exposure & Productivity Analysis

Meridian Trades Alliance —
Deliverable 2 of 4

Prepared for Meridian Trades Alliance (synthetic) by Trust Insights

Scope: Per-role AI exposure matrix across all in-scope Membership, Communications, Events, Data, Member Services, and Finance roles — the analytical basis for productivity-versus-reduction decisions.

Coverage: 6 roles • 144 tasks • Trust Insights TRIPS Framework • July 2026 (illustrative sample)

This is a fully synthetic sample built for a fictional company — not a real Trust Insights client engagement.

Executive Summary

Trust Insights decomposed 6 in-scope Meridian Trades Alliance roles into 144 discrete tasks and scored each one on the TRIPS framework (Time, Repetitiveness, Importance, Pain, Sufficient data) and on AI capability likelihood — the confidence that today's AI can perform the task at roughly 80% of a skilled human's quality. This report rolls those scores up to the organization level, then breaks them down role by role.

The headline is one of **capacity, not headcount**. Roughly 57% of the hours this staff spends sit in tasks that AI can largely carry today. That is reclaimable capacity — time that can be redirected toward member relationships, strategy, and the judgment-driven work that only people can do. Whether Meridian converts that capacity into *productivity* (more output and higher-value work from the same team) or into *reduction* (fewer people doing the same output) is a leadership decision. This report is built to inform that decision; our strong recommendation is to lead with productivity and redeployment.

6

IN-SCOPE ROLES
ANALYZED

144

DISCRETE TASKS
SCORED

7.2

WEIGHTED AI
EXPOSURE /10

57%

OF WORKWEEK IN
8+/10 TASKS

What the data says

Across the organization, **72 of 144 tasks (50%)** score 8 or higher out of 10 for AI capability. The workweek-weighted AI exposure is **7.2/10**, and **57% of the collective workweek** is spent on those high-confidence tasks. At the other end, 18 tasks score 4 or lower — the human-essential core of member relationships, judgment, and leadership that should be protected and prioritized.

The opportunity clusters consistently: **reporting and dashboards, membership data hygiene, templated member/donor communications, and event/CE administrative tracking**. The work that stays human is just as consistent: **chapter and sponsor relationship management, escalated member issues, board and executive judgment calls, and on-site event troubleshooting**.

ONE PREREQUISITE GATES EVERYTHING

The highest-value automation targets — dashboards, reporting, and AI-drafted member communications — all depend on clean data in the association management system (AMS). AMS data integrity is both a top opportunity and the dependency for every other opportunity. It must be addressed first, or downstream automation will simply produce wrong answers faster.

How to read the rest of this report

The **Cross-Role Rollup** establishes the organization-wide picture and the decision lens. The **Per-Role Exposure Matrix** ranks every role by AI exposure. The **Role Breakouts** give each role its specific

automation opportunities, its protected human-essential work, and a recommended play. The **Action Plan** closes with a 30/60/90-day sequence.

The Decision Lens: Productivity vs. Reduction

An AI-exposure score answers "can a machine do this?" It does not, by itself, answer "what should we do about it?" To turn exposure into a decision, sort every task into one of four responses. Meridian's reclaimed capacity is large enough that the first two — Augment and Redeploy — are where the value lives. Reduction is a lever leadership *can* pull, but it is the last and most cautious option, not the default.

AUGMENT — LEAD HERE

Tasks where AI produces the first draft or the analysis and a person directs and validates. This covers most **Data/Analytics** and **Creative/Content** work — the two largest pools of high-AI tasks. The result is the same people producing materially more, at higher quality, in less time.

REDEPLOY

Routine **Administrative** and **Operations/Execution** tasks that AI can run end-to-end — status reports, data entry, scheduling, dashboard upkeep. Automate them and move the reclaimed hours to member-facing and strategic work.

PROTECT

The human-essential core: chapter and sponsor relationships, escalated member issues, executive presentation, and on-site event judgment. Do not automate these — this is precisely where reclaimed capacity should be reinvested.

REDUCE — OPTIONAL, LAST

If, after automating and redeploying, leadership still chooses to convert capacity into cost savings, the exposure data shows where that is defensible. We recommend treating reduction as a deliberate choice made *after* measuring redeployed productivity — not as the opening move.

Cross-Role Rollup

Aggregating all 144 tasks across 6 roles reveals where AI capability concentrates by type of work. Two categories — Data/Analytics and Creative/Content — account for 44 of the 72 high-confidence (8+/10) automation opportunities, just over 61% of them.

Average AI likelihood by task category

Mean AI capability score (0–10) across all tasks in each category; task counts in parentheses.



Where the high-confidence opportunities sit

CATEGORY	HIGH-AI TASKS (8+/10)	SHARE OF ALL HIGH-AI TASKS	CATEGORY AVG AI
Data/Analytics	32	44%	8.3
Creative/Content	12	17%	7.6
Operations/Execution	10	14%	6.8
Technical/IT	6	8%	7.1
Communication	6	8%	5.4
Administrative	6	8%	7.1

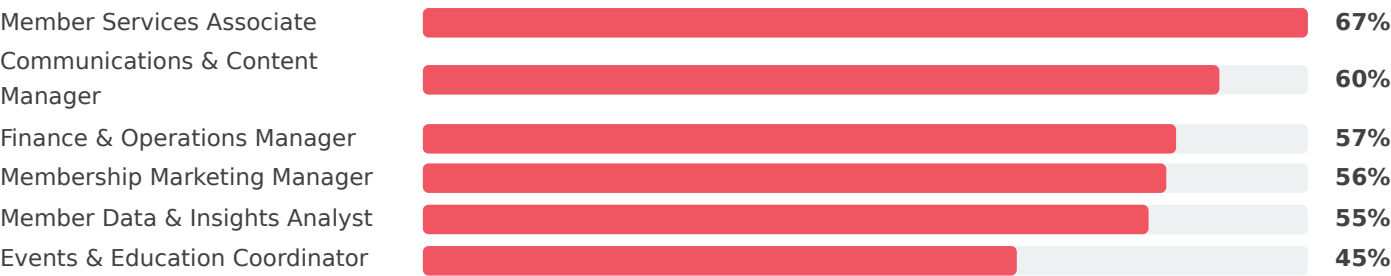
The practical reading: **reporting and member-data hygiene are the universal AI opportunities** at Meridian. Nearly every role spends meaningful time pulling reports, updating records, and drafting communications, and AI is highly capable at all three. A horizontal investment in AI-assisted reporting and data hygiene would touch all 6 roles, which is why the action plan treats these as the first pilots.

Per-Role AI Exposure Matrix

Every in-scope role, ranked by the share of its workweek spent on high-confidence (8+/10) automatable tasks. Exposure tiers: High 45%+ Moderate 35-44% Targeted below 35%.

ROLE	TASKS	WEIGHTED AI EXPOSURE /10	% WEEK IN 8+/10 TASKS	AVG TRIPS	EXPOSURE TIER
Member Services Associate	24	7.8	67%	3.00	High
Communications & Content Manager	24	7.1	60%	3.13	High
Finance & Operations Manager	24	7.2	57%	3.27	High
Membership Marketing Manager	24	7.0	56%	3.29	High
Member Data & Insights Analyst	24	7.1	55%	3.18	High
Events & Education Coordinator	24	6.7	45%	3.08	High

Exposure ranking



High exposure is an opportunity signal, not a verdict on the role's importance — the front-line and data-heavy roles score highest because their week is concentrated in high-volume, templated work; the coordination and relationship-heavy roles score lower because more of their time is protected, judgment-based work.

Role Breakouts

Each role below shows its exposure tier and key metrics, its strongest AI automation opportunities, the human-essential tasks to protect, and a recommended play. Roles appear in descending order of AI exposure.

Member Services Associate

High exposure

24

tasks analyzed

7.8

weighted AI exposure /10

67%

of week in 8+/10 tasks

Augment & Redeploy

recommended play

This is the most AI-exposed of the six Meridian roles: roughly two-thirds of the associate's week is spent on high-volume, templated work — renewals, profile updates, FAQ answers, certificate issuance, and interaction logging — that AI can handle with light oversight. The opportunity is not to eliminate the role but to redeploy reclaimed capacity toward the smaller but critical set of judgment calls — escalated complaints, ambiguous billing disputes, and renewal-season planning — that still require a human. Getting AMS/CRM data quality and knowledge-base content in order is the prerequisite that unlocks most of this automation. Meridian should pilot AI-assisted renewal processing and email drafting first, since they carry the highest combined TRIPS-and-AI-likelihood scores and touch the largest share of weekly volume.

TOP AUTOMATION OPPORTUNITIES

AI	WK%	CATEGORY	TASK
9	7%	Operations/Execution	Process membership renewals and payment updates
9	8%	Data/Analytics	Log member interactions in the CRM ticketing system
10	5%	Communication	Answer FAQ-driven questions using the knowledge base
9	9%	Communication	Respond to member emails (general inquiries)
9	6%	Administrative	Update member profile records in the AMS
10	4%	Operations/Execution	Issue membership certificates and digital badges

HUMAN-ESSENTIAL (PROTECT)

AI	TASK
3	Handle escalated or emotional member complaints
4	Troubleshoot AMS/CRM data sync, login, and system access issues
3	Support annual dues renewal season planning

Communications & Content Manager

High exposure

24

7.1

60%

Augment & Redeploy

tasks analyzed weighted AI exposure /10 of week in 8+/10 tasks recommended play

For Meridian's Communications & Content Manager, roughly seven in ten weekly hours sit in tasks -- daily social posting, media monitoring, blog drafting, newsletter assembly, and press release first drafts -- that generative AI can already handle at a strong first-draft standard, provided a human reviews for voice and accuracy. The play here is not replacement: it is freeing this person from the content-production treadmill so they can spend more time on the judgment-heavy work only they can do -- fielding sensitive media inquiries, managing spokesperson relationships, and drafting board and crisis messaging where trust and nuance matter most. Expect the biggest early win from media monitoring and social content, where volume is high and templates are abundant. Longer term, redeploying reclaimed hours toward strategic media relationships and crisis-readiness planning will do more for Meridian's reputation than squeezing out the last hour of drafting time.

TOP AUTOMATION OPPORTUNITIES

AI	WK%	CATEGORY	TASK
9	10%	Creative/Content	Draft, schedule, and publish daily social media posts (LinkedIn, X, Facebook)
9	7%	Data/Analytics	Monitor industry news and social media for Meridian and policy mentions
8	8%	Creative/Content	Write and publish weekly blog articles and industry updates
8	7%	Technical/IT	Update website content (event pages, resource libraries, staff bios, policy statements)
9	4%	Data/Analytics	Compile the weekly media monitoring digest
9	4%	Data/Analytics	Track social and website analytics and produce the monthly performance report

HUMAN-ESSENTIAL (PROTECT)

AI	TASK
3	Respond to inbound media inquiries
4	Draft talking points and briefing documents for the CEO and board chair
2	Coordinate spokesperson availability for media requests
3	Draft crisis communication holding statements

Finance & Operations Manager

High exposure

24

7.2

57%

Augment & Redeploy

tasks analyzed weighted AI exposure /10 of week in 8+/10 tasks recommended play

The Finance & Operations Manager role at Meridian Trades Alliance is concentrated in templated, data-rich back-office work: 57% of the workweek falls into reconciliations, AP/AR processing, and recurring report preparation that AI can already handle at high confidence with oversight. This creates a strong case for augmenting the monthly close, dues/fee reconciliation, and CFO/board reporting cycles with AI-assisted matching, coding, and drafting tools, while protecting judgment-heavy work like vendor contract negotiation and ad hoc budget guidance to department heads. Because reconciliation accuracy depends entirely on clean AMS, bank, and GL data, fixing data integrity in those source systems is the prerequisite before any automated matching or reporting workflow can be trusted. The recommended play is Augment & Redeploy: compress the mechanical close and reconciliation cycle with AI, then redirect the reclaimed capacity toward budget strategy, audit readiness, and higher-value stakeholder communication.

TOP AUTOMATION OPPORTUNITIES

AI	WK%	CATEGORY	TASK
9	6%	Data/Analytics	Monthly bank & GL account reconciliations
9	8%	Operations/Execution	AP vendor invoice processing & coding
9	5%	Data/Analytics	Credit card statement reconciliation & expense coding
8	5%	Data/Analytics	Membership dues & certification fee reconciliation vs AMS
8	5%	Data/Analytics	Monthly financial reports & dashboards for CFO/board
9	3%	Data/Analytics	Fixed asset register & depreciation schedule maintenance

HUMAN-ESSENTIAL (PROTECT)

AI	TASK
4	Ad hoc budget Q&A for department heads
3	Vendor contract review & negotiation support

Membership Marketing Manager

High exposure

24

7.0

56%

Augment & Redeploy

tasks analyzed weighted AI exposure /10 of week in 8+/10 tasks recommended play

This role's AI exposure runs hot: a weighted average likelihood of 7.1 out of 10, with 56% of the workweek sitting in tasks we'd score 8 or higher. The biggest cluster is data plumbing and templated content — AMS dedupe and bounce cleanup, weekly newsletter drafting, renewal reminder copy, and campaign metrics review — all high-frequency, well-documented, low-judgment work that AI can take a first pass at today. What stays firmly human is anything relational or genuinely strategic: chapter-leader calls, cross-team coordination with Communications and Events, and quarterly campaign strategy, where the value is in trust and judgment, not throughput. Our recommendation is Augment & Redeploy — layer AI drafting and data-cleaning agents under the manager's existing workflow to reclaim the 15-20% of the week currently lost to list hygiene and templated copy, then redeploy that time into chapter relationships, board storytelling, and campaign strategy where a human's judgment actually moves the renewal number.

TOP AUTOMATION OPPORTUNITIES

AI	WK%	CATEGORY	TASK
9	6%	Technical/IT	Cleaning and deduplicating membership records in the AMS
9	6%	Creative/Content	Drafting the weekly membership newsletter
9	5%	Data/Analytics	Reviewing weekly email campaign performance metrics
9	5%	Technical/IT	Updating bounced email addresses and contact info
9	5%	Creative/Content	Drafting renewal reminder emails (90/60/30/10-day cadence)
9	5%	Data/Analytics	Segmenting the member/prospect list for targeted campaigns

HUMAN-ESSENTIAL (PROTECT)

AI	TASK
2	Attending monthly chapter-leader calls
4	Planning the quarterly membership acquisition campaign strategy
4	Coordinating with Communications on member-facing announcements
4	Coordinating with Events on conference registration promotion

Member Data & Insights Analyst

High exposure

24

7.1

55%

Augment & Redeploy

tasks analyzed weighted AI exposure /10 of week in 8+/10 tasks recommended play

As the most data-intensive, systems-driven role in the association, the Member Data & Insights Analyst position shows the highest AI exposure of any Meridian Trades Alliance role analyzed, with over half the workweek concentrated in dashboard refreshes, data-quality audits, and templated reporting that AI can largely automate today. The play here is not headcount reduction but capacity redeployment: freeing the analyst from repetitive extraction and QA work to spend more time on churn-driver investigation, benchmarking judgment calls, and the live stakeholder interpretation that still requires a human in the room. A small set of tasks — presenting findings to leadership and shaping strategic retreat input — remain firmly human-essential because they depend on organizational context and real-time judgment AI cannot supply. Meridian should pilot automation on the top five tasks first, using the time savings to expand the analyst's role toward higher-value strategic analytics rather than cutting the position.

TOP AUTOMATION OPPORTUNITIES

AI	WK%	CATEGORY	TASK
9	9%	Data/Analytics	Refresh and QA the monthly board membership dashboard
9	7%	Data/Analytics	Run recurring AMS data-quality audit scans
8	5%	Data/Analytics	Produce the quarterly renewal and churn trend report by segment
8	10%	Data/Analytics	Field and fulfill ad hoc data-pull requests from department heads
8	5%	Data/Analytics	Update and refresh the member engagement scoring model
8	4%	Technical/IT	Build and maintain self-service reporting templates and dashboards

HUMAN-ESSENTIAL (PROTECT)

AI	TASK
4	Present dashboard and analysis findings in internal meetings
3	Participate in strategic planning retreat prep, advising on membership data implications

Events & Education Coordinator

High exposure

24

6.7

45%

Augment & Redeploy

tasks analyzed weighted AI exposure /10 of week in 8+/10 tasks recommended play

The Events & Education Coordinator role carries a high concentration of repetitive, template-driven communication and data-tracking tasks -- attendee inbox responses, registration confirmations, CE transcript maintenance, and post-event reporting -- that together account for roughly a third of the workweek and score 8-9 on AI likelihood given their volume and abundant historical examples. At the same time, the role's highest-stakes moments -- live on-site troubleshooting during the annual conference, sponsor relationship negotiation, and ongoing speaker relationship management -- remain firmly human-essential due to real-time judgment, negotiation, and interpersonal trust that AI cannot replicate. With a weighted AI exposure of 6.66/10 and 57% of the workweek touching AI-suitable tasks, Meridian Trades Alliance should pursue an Augment & Redeploy strategy: deploy AI to draft attendee communications, maintain CE transcripts, and auto-generate post-event and budget reports, then redeploy the reclaimed hours toward sponsor cultivation, speaker relationships, and chapter support that drive member value.

TOP AUTOMATION OPPORTUNITIES

AI	WK%	CATEGORY	TASK
9	6%	Data/Analytics	Maintain member CE credit transcripts and process CE issuance
9	10%	Communication	Respond to attendee inbox questions
9	3%	Data/Analytics	Build post-event reports
9	8%	Communication	Draft and send registration confirmation emails
8	4%	Data/Analytics	Reconcile events budget actuals against budget
8	4%	Data/Analytics	Process and track vendor invoices and deposits

HUMAN-ESSENTIAL (PROTECT)

AI	TASK
2	Troubleshoot on-site conference logistics in real time
2	Manage ongoing speaker relationships
2	Negotiate and manage sponsor relationships

Action Plan & Next Steps

The analysis points to a clear sequence. Stabilize the data foundation, pilot the two universal opportunities in the highest-exposure roles, measure the reclaimed capacity, and only then decide how to spend it.

DO THIS FIRST — THE PREREQUISITE

Audit and fix AMS data integrity. Deduplicate member records, standardize fields, and repair sync errors between the AMS, email platform, and event registration system. Every high-value automation depends on it.

Days 0-30 — Validate & stabilize

- **VALIDATE** Review this exposure matrix with each role owner; confirm task inventories reflect how the work is actually done.
- **PRIORITIZE** Confirm the two pilot roles — the highest-exposure roles from the matrix above.
- **FOUNDATION** Run the baseline AMS data-integrity audit and scope the cleanup.
- **GOVERNANCE** Define the human-in-the-loop review standard for AI-assisted member communications.

Days 30-60 — Pilot

- **BUILD** Stand up AI-assisted workflows for the two universal opportunities in the pilot roles.
- **FIX** Execute the top data-integrity fixes so pilot reporting draws on clean data.
- **ENABLE** Create prompt libraries, templates, and review checklists for the pilot roles.
- **MEASURE** Instrument the pilots: track hours reclaimed, output volume, and quality against the pre-AI baseline.

Days 60-90 — Scale & decide

- **REVIEW** Quantify reclaimed capacity from the pilots and confirm quality held under human-in-the-loop review.
- **DECIDE** For each role, make the explicit productivity-vs-reduction call.
- **EXPAND** Roll proven workflows out to the remaining roles in exposure-rank order.
- **SUSTAIN** Establish a quarterly cadence to refresh the task inventory and re-baseline.

Methodology note: AI capability likelihood reflects confidence that current AI can perform a task at approximately 80% of skilled-human quality with appropriate human oversight; it is not a measure of unattended automation or guaranteed time savings. Source: Trust Insights TRIPS role analyses, 6 roles, 144 tasks — synthetic illustrative sample, July 2026.