



MARKETING
CONSULTANCY

A CMO CHECKLIST FOR AI

HOW SENIOR MARKETERS CAN
MAXIMISE THE BENEFITS OF AI,
STARTING TODAY

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INTRODUCTION

No doubt by now you will have personally used ChatGPT or Microsoft's Co-Pilot (also powered by Open AI) and realised the power that it can bring to your team and organisation. It is important to note that this technology did not appear overnight and was already on its third release when it came to market. New updates and alternatives are being launched on a weekly basis, with accelerated functionality and more precise applications to solve new problems. This pace of change is creating an entirely new paradigm.

Bill Gates once said that we tend to over-estimate the impact of technology in the short-term, and under-estimate its impact in the long term. While this is often true, there are already tangible applications of AI that can create value today and there will be seismic leaps in how it enables and changes the way organisations operate over the next five years.

Marketers should learn the lesson from the slow pace with which the industry engaged with cookieless and martech evolution and ensure the same mistake is not made with AI. With enough data and server power, the prospects for leveraging AI in the coming years are endless. A culture of reimagination around team structure, talent responsibilities and workflows are paramount.

To harness the power of AI – whether via a Large Language Model (LLM) or other formats – there are many steps an organisation must take. As with all technologies, the evolution of AI is about understanding and imagining “the art of the possible.” What can be automated will be automated, enabling marketing teams to focus on higher value, strategic growth efforts.

AI will become a “companion” set of tools for marketers to augment and expedite tactics and experimentation. Personalisation at scale, coupled with more granular reporting, is fast becoming an achievable reality, which was not the case just six months ago.

The velocity with which gen AI is progressing presents challenges for any department to maintain pace; therefore, **it is critical to build an intentional strategy and culture around engagement, experimentation and evaluation.** Leading organisations already have an AI Council and SteerCo in place, supported by Tiger Teams or Guilds to rapidly discover, review and experiment with new AI tools. They also have a clear plan on how they are pushing AI strategy both top-down and bottom-up and have established commitments and partnerships to enable this strategy.

CvE Marketing Consultancy has created this checklist for CMOs to address observed challenges to AI adoption and execution. As senior marketers feel the pressure to implement generative AI technologies, it is critical to ensure teams stay focused on building smart, not just building first. The examples provide actionable ways for CMOs to keep pace with technological advances and make substantive marketing improvements without danger of customer experience nor corporate reputational risk. The guide has also importantly been designed to consider how best to build a culture of innovation and a learning mindset around generative AI.



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BUSINESS CASE & SUCCESS FACTORS

1. Establish Clear Guidelines & Use Cases

Principle: Provide specific guidelines on what common AI tools can, and equally cannot be used for. Define and document detailed use cases and the desired outcomes that are approved for marketing use. Ensure there are clear lead and lag success measures for these use cases and that there is tolerance for experimentation and failure given the nascency of AI applications or more advanced use cases.

Example: Marketing teams using AI to simulate different consumer responses to targeted ad campaigns before actual implementation, ensuring results are consistent and strategies optimised based on predictive analytics.

2. Define Measurable Objectives and KPIs

Principle: Establish specific, measurable goals for AI implementation, such as increasing personalisation, improving customer engagement, or enhancing content creation efficiency. Be sure to apply appropriate deadlines by which results expect to be realised as adoption of new processes, and model training, will take time.

Example: Enabling inhouse teams to use gen AI tools for new marketing content can be measured by cost savings from outsourcing fees, speed to market of new campaigns, higher velocity learning, improved engagement rates from personalised customer journeys.

HYGIENE & INFRASTRUCTURE

3. Do or Die on Data Infrastructure

Principle: Data structure, strategy and hygiene have no doubt been in progress in your organisation for years, but now it is business critical to have a clear acceleration plan with firm completion dates. Without this, companies will be left behind in their march towards an AI enabled future. Data hygiene and harmonisation, along with detailed documentation, are critical to leveraging the value from AI models.

Example: Investing in cloud storage solutions and robust data management systems.

4. Commit to a Future-Proofed Data Privacy and Compliance Plan

Principle: Data privacy must be front and center in your IT and marketing strategies, along with ensuring a clear roadmap for solving digital identity. Specifically, there must be zero tolerance adherence to data privacy laws and consent, as well as clearly defined ethical guidelines for using AI for marketing purposes to prioritise positive customer experience.

Example: Implementing protocols to anonymise personal data before it is processed by AI models.

5. Develop a Content Governance Framework

Principle: Establish guidelines to ensure that all AI-generated content aligns with brand values and messaging. Given content production is a real, viable use case today, ensure that brand guidelines and guardrails are defined in greater detail so that an AI model can be compliantly trained.

Example: Creating a content review committee involving marketing, legal, and compliance teams.

STAKEHOLDER ALIGNMENT & ROADMAPPING

6. Promote Always-On Collaboration Between Marketing and IT

Principle: Today's best marketing organisations have shared strategies and stand-ups anchored to revenue or market share growth objectives. A key aspect of collaboration should be around the development of a sandbox environment for experimentation and technical support to deliver on high value marketing use cases.

Example: Holding regular meetings between marketing and IT teams or creating a taskforce to discuss AI projects and focus on identified, valuable actions.

7. Align AI with Marketing Strategy

Principle: Ensure AI initiatives aren't executed in isolation but rather, complement and augment existing marketing strategies and business objectives. Align the utilisation of AI tools with individual or collective use cases and ensure there are clear lead and lag measures of success.

Example: Deploying AI tools to target highly personalised campaigns to target growth customer segments.

EXPERIMENT, ITERATE AND SCALE

8. Upskill and Train Teams

Principle: Provide training on AI applications in marketing and any specific tools your organisation adopts. Develop multiple format learning and development; e-learning, mentoring and pairing opportunities.

Example: Investing in or building best-in-class training programs to help marketing staff effectively use predictive analytics tools.

9. Experiment with Tools and Monitor Performance Carefully

Principle: Start with pilot projects to assess the effectiveness of AI applications, and associated data sharing, in controlled environments before wider deployment. Assess legal protections for your own organisation if testing internally, or that of customers. Once implemented, regularly review the performance of AI against set KPIs and adjust strategies, as necessary.

Example: Selecting a particular marketing channel, like email, to launch a proof of concept set of campaigns in a specific region. Using dashboards that provide real-time metrics on AI performance.

10. Adapt Strategies for Enhanced Creativity and Innovation

Principle: The best organisations are exploring ways to use AI, not just for automation, but to unlock new creative potentials in marketing campaigns. Gen AI tools that allow concept origination from key insights and machine-based 'brainstorming' should be experimented with early to understand the "art of the possible."

Example: Implementing AI-driven tools for A/B testing different creative elements in advertisements.

CONCLUSION

The integration of AI into marketing strategies is a necessity and is no longer a futuristic concept. Efficiencies for the enterprise, as well as value creation for customers, require thoughtful preparation and accountability from multiple stakeholders. Our goal is to help CMOs strategically integrate AI to enhance marketing efforts, improve CX and drive business growth whilst managing risks effectively. The key lies in establishing clear guidelines, measurable objectives, and robust data infrastructure, while fostering a test-and-learn culture of collaboration and continuous learning.

ABOUT THE AUTHORS

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Paul Frampton is the global president of CvE Marketing Consultancy. Having previously served both as CEO of a tech scaleup, Tink Labs (handy and hi inc), and as CEO of Havas Media Group UK and Ireland, Paul's experience makes him uniquely suited to deliver the CvE promise of helping global brands leverage marketing as a more effective growth engine. After running the agency group, Paul oversaw a sales and marketing team at TinkLabs which gave him a unique perspective on the advertising agency and vendor landscape. Taking this insight, in building CvE, Paul has prioritised customer centricity, value creation and trusted advice for brands on how to construct and optimise the optimal model, whether that be around in-housing or selecting the optimal technology stack for their business.

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Vanessa Miceli is the global data and tech practice lead at CvE. She is a data-driven marketing leader and practitioner, with experience dating back to when digital was "new media." As a solution architect and data strategist, she helps brands of varying maturity build bridges across marketing, IT and analytics to deliver optimal customer experiences. She has worked with several of the Fortune 100 to drive acquisition, efficiency, retention and transformation goals. She strives to make the innovative accessible, to use data intelligently and responsibly, and to promote women in tech.



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