

AI for CMOs:

The Real-World Playbook
for Digital Transformation



[PERSADO]

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For today's CMO, true digital transformation demands a level of personalization unparalleled in modern marketing. While personalization drives tremendous value, existing approaches often fall short. Personalized offers and incentives commonly fail to address the most important factor driving conversion: motivation. We need to "speak" to each customer or prospect as if our brands know the individual personally and know exactly what motivates and inspires them...while speaking in the brand's voice.

That means that CMOs and their teams are tasked with creating unforgettable customer experiences across a multitude of channels and touchpoints. This customer experience must be always authentic, always frictionless, and always on.

This endeavor is too daunting for humans alone—and we see that truth play out every day. Despite having more data than ever, we fail to create the experiences our customers demand and deserve. In the process, we struggle to prioritize and perform in a noisy marketing world.

Artificial intelligence possesses the power to change all of this.

AI personalizes marketing and unlocks business data in ways that were previously impossible. Using AI, brands can now serve millions of consumers with individually relevant touchpoints in real time. We've seen this first-hand in our work at Persado, where our clients are using Motivation AI to personalize communications at scale by generating content and messages that motivate each individual to engage and act.

Early AI adopters are using the technology to power personalization in marketing communications that are massively more effective, more personalized, and even more human.

Engaging customers and increasing conversions are the heart of driving growth. The biggest driver of conversion (70%) is inspiring a want for your product above others, which requires understanding what will motivate a customer to act. Discovering the language that will motivate engagement and action, and then generating that language to hyper-personalize communications, will unlock tectonic business growth. AI is the technology that can deliver those transformative results.

That's why we've teamed up with Marketing AI Institute, the leading provider of AI education for marketers, to create AI for CMOs: The Real-World Playbook for Digital Transformation.

The guide is designed to help CMOs understand and seize the AI opportunity as quickly as possible, by providing a highly practical playbook to understand and adopt AI across marketing use cases. Once you read it, you'll be prepared to begin your AI journey.

And the guide is just the beginning.

As part of our larger AI for CMOs initiative with Marketing AI Institute, we're telling the story of AI and digital transformation through the eyes of real CMOs from diverse backgrounds who are leading the understanding and adoption of AI in their organizations.

Using a variety of mediums, we'll be sharing the personal journeys of these leaders, exploring their hopes, struggles, truths, and aspirations. In the process, we hope to inspire marketing leaders around the world to grow smarter through the responsible application of AI.



Asma Stewart,
VP of Marketing, Persado

About the Authors

This *AI for CMOs* ebook is written by Paul Roetzer and Mike Kaput of [Marketing AI Institute](#). Paul and Mike are the co-authors of [Marketing Artificial Intelligence: AI, Marketing and the Future of Business](#) (Matt Holt Books, 2022). Portions of this ebook are adapted from the *Marketing Artificial Intelligence* manuscript.



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The AI Opportunity for Every CMO

Digital transformation is now the core strategic priority for CEOs, with the past 24+ months only accelerating the market shift. In a survey by IBM, 3,000 CEOs said technological factors were the number one concern for their enterprises over the next two to three years. As a result, 60% say they're accelerating digital transformation efforts.¹

This should be good news for CMOs. According to research from The CMO Council, the majority of the C-suite says the essential role of a CMO is to be a digital transformation leader. As companies go all-in on digital transformation driven from the top, CMOs should stand to benefit.

So why are CMOs being sidelined?

That's right. Instead of leading digital transformation, CMOs are watching their budgets and influence shrink. According to Gartner's CMO Spend Survey,² marketing budgets (as a slice of company revenue) have gone from 11% in 2020 to 9.5% in 2022. However, that's up from just over 6% in 2021—the lowest level in the history of the survey. A full 83% of CEOs told Gartner that they intend to increase spending on digital, but **less than half intend to increase marketing spend.**³

What's going on?

CMOs should be at the center of company-wide digital transformation initiatives, working hand-in-hand with CEOs and C-level executives to transform the business. Instead, they're being underfunded and overlooked as the organization moves forward.

There's a worrying reason why.



60%
of CEOs say they're
**accelerating
digital
transformation
efforts**

¹ [C-suite Series: The 2021 CEO Study](#)

² [The State of Marketing Budget and Strategy in 2022](#)

³ [Leadership Vision for 2021: Chief Marketing Officer](#)

The Ugly Truth

CMOs have fallen behind.

It's uncomfortable, but it's true. The data shows that CMOs have failed to adapt to new technologies and deliver the performance expected of marketing.

In a survey conducted by Rackspace of over 1,400 enterprise leaders and employees, CMOs were ranked second-to-last out of the entire C-suite in their understanding of technology.⁴ That sentiment is echoed by the C-suite. C-suite executives surveyed by CMO Council say marketing leadership's number-one gap is the modernization of the marketing organization, its systems, and its operations.⁵

As a result, CEOs are relying on others to lead digital transformation.

Their words, not ours. IBM asked CEOs which members of the C-suite would play the most crucial role in their organizations over the next two years. CIOs and CTOs were mentioned more than twice as often as CMOs. CFOs and COOs also beat out marketing as digital transformation leaders.

CMOs are failing to adapt to this reality. Just 38% of marketing leaders told Gartner they wished to increase their digital know-how over other professional capabilities like branding and messaging.⁶

This puts CMOs in a perilous position. They're still on the digital transformation team, but their clout and resources are waning. As a result, they risk being benched while companies run with their digital transformation playbooks.

That's the bad news.



38%
of leaders wish to
**increase digital
know-how**

86%
of surveyed
professionals say
**AI is going
mainstream at
their company**

⁴ [How Applications Impact Customer Experience](#)

⁵ [C-Suite Scorecard](#)

⁶ [Strategic Priorities for CMOs](#)

The Good News

This wake-up call is a massive opportunity for CMOs to transform their organizations and careers.

CMOs now have a once-in-a-career opportunity to play a starring role in digital transformation. In the process, they can also revolutionize their marketing operations.

How? With artificial intelligence.

AI is increasingly seen by CEOs as absolutely critical to making company-wide digital transformation successful. AI technologies—such as chatbots, voice technologies, and natural language processing (NLP)—are championed by a whopping 82% of CEOs at companies that outperform their peers, says IBM. A full 86% of professionals surveyed by PwC (71% of them C-suite) say AI is going mainstream at their company.⁷

AI gives CMOs a massive opportunity to become indispensable digital transformation change agents.

That's because AI is now highly accessible to non-engineers and non-technical leaders.

It's already being deployed by forward-thinking companies to grow revenue, make smarter decisions, and improve customer experiences. And it's getting results.

An increasing number of firms surveyed by McKinsey say at least 5% of earnings before interest and taxes (EBIT) are attributable to AI.⁸

This is where the opportunity for CMOs comes in.

In the eyes of CEOs, AI is the foundation of true digital transformation—and its top use cases are in marketing.

AI is projected to create \$1.4 to \$2.6 trillion of value in marketing and sales alone, says McKinsey.⁹ Today, there are hundreds of accessible AI applications across analytics, content, customer experience, digital, ecommerce, personalization, and other core marketing operational areas.

Savvy CMOs are already taking advantage. In a survey from Dentsu, CMOs who felt most prepared for the future are using AI and AI-powered technologies like voice interfaces and chatbots to improve customer experience.¹⁰



Marketers expect
**AI usage to
triple
over the next
3 years**

⁷ [AI Predictions 2021](#)

⁸ [The state of AI in 2021](#)

⁹ [Most of AI's business uses will be in two areas](#)

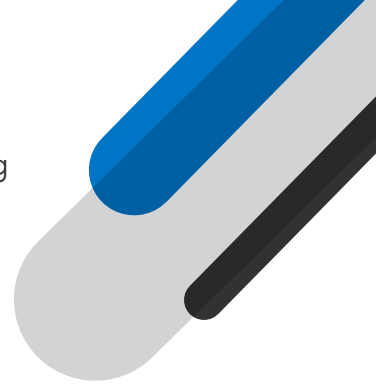
¹⁰ [CMO survey 2020](#)

Yet, much of the current value of AI in marketing remains untapped. According to The CMO Survey 2021 from Deloitte, marketers say they only use AI about 12% of the time, but that they expect usage to triple over the next three years.¹¹ The timing couldn't be better. As companies look to organization-wide digital transformation, marketing leaders have a unique opportunity to lead AI adoption.

More than any other company function today, marketing has both immediate applications and quick-win opportunities to use AI to drive incremental revenue.

Any CMO can understand AI. Any CMO can apply AI. And any CMO can position themselves as the AI champion at their organization, increasing their performance, influence, and relevance.

The time for AI + CMOs is now.



AI is
the science
of making
machines
smart

Practical Applications of AI for CMOs

You don't have to have a computer science or machine learning background to take advantage of the opportunities that AI provides.

You just need to have a solid understanding of how AI can help you—and an appreciation of possible use cases in marketing. This section is designed to give you both in a short amount of time.

First, we'll walk through an easy-to-understand non-technical definition of AI, then show you exactly how forward-thinking marketers are using it today.

¹¹ [The CMO Survey Highlights and Insights Report](#)

What Is AI?

Artificial intelligence is “the science of making machines smart,” according to Demis Hassabis, co-founder and CEO of DeepMind, and one of the top minds in AI.

We like that definition, but would add to it:

Artificial intelligence is the science of making machines smart—and these machines enhance human knowledge and capabilities.

On a practical level, AI is an umbrella term for all the technologies and techniques that make machines smart. It includes terms you may have heard like **machine learning, deep learning, natural language generation, natural language processing, image recognition, and neural networks**. These AI technologies power machines that can be taught to be human-like: they hear, talk, write, see, move, and understand language.

For example, Alexa and Siri are machines that have the ability to listen, understand, and respond using AI applications including natural language processing, natural language generation, and machine learning.

By acting as an extension of our brains, AI enhances our knowledge by helping us make better predictions and decisions. It also enhances our capabilities by scaling the human-like capabilities mentioned above. What’s more, AI can get smarter over time. It can learn and improve without direct human intervention.

And this is where the magic happens.

Why AI Is Totally Different from Your Current Martech

Many marketing technologies you use today are elementary, and limited in capability.

Traditional martech tools are programmed entirely by engineers. They can perform feats of automation. But they can't do anything they're not explicitly coded to do. The only time they improve is when engineers release a new update or version. When they do get updated, they don't automatically work for you—you and your team need to continually learn new features to get marketing results.

It's impossible for these tools to adapt quickly enough to changing consumer needs and expectations. There's a reason the martech landscape now has nearly 10,000 solutions¹²—marketers are demanding solutions and features faster than existing platforms can provide them.

Not to mention, it's extremely difficult for marketers to stay up to date on their current stack, much less new tools, as the rate of technology accelerates. (This could be a contributing factor to why marketing leadership is rated so low on technical expertise by the rest of the C-suite.)

Your traditional marketing automation is manual, but AI has the power to bring truly intelligent automation to your business.

You have to do all the strategy, budgeting, resource allocation, campaign planning, asset creation, campaign execution, performance reporting, and everything else that leads up to martech solutions automating your marketing tasks. You and your team also have to continually learn how to get the most value out of these solutions, and maintain them as campaigns grow in scope and scale.

This is an enormous amount of complexity to manage effectively at speed. It's no wonder that CMOs report only 58% of their marketing tech stack is being used to its full potential, despite spending a full quarter of their budgets on it.¹³

Here's the dirty little secret: It's actually impossible to manage, which is why so many marketing leaders can't get it right. The rate of technological acceleration has reached a speed at which it's impossible for humans to manually keep up on their own.

But what if it didn't have to be this way?

What if marketing success didn't solely rely on traditional, rules-based marketing technology?

What if it didn't require superhuman efforts to get value out of your technology?

¹² [Marketing Technology Landscape Supergraphic \(2022\)](#)

¹³ [Leadership Vision for 2021: Chief Marketing Officer](#)



CMOs report only
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What if the technology itself constantly learned and improved, and did the work for you?

Enter AI.

AI takes in structured and unstructured data at scale, and discovers patterns and insights that marketers would never even consider. Then, it makes predictions, recommendations, and decisions based on that information, often with limited human oversight. And, every time AI takes an action, it has the potential to learn from the outcome and improve its performance on the next action.

Humans still tell the machine what outcome they'd like to achieve or what prediction to make. They still decide what to do with that information. They just don't have to do all the repetitive, time-consuming work required to get there. And they don't have to keep up with the machine's improvements to get improved results.

How AI Can Help

At the end of the day, everything a successful CMO does boils down to creating a better customer experience and driving business results. Today, delivering an exceptional customer experience is only possible through transformation of digital operations. To do that, marketers—and organizations at large—rely on data to build these experiences and, by extension, achieve true digital transformation.

Traditional technology can't do much to help you personalize the customer experience beyond basic automation. It can't tell you what each individual consumer is looking for when they engage with your brand. It can't predict what products or services they might want to buy from you next. And it can't forecast which activities will lead to the best customer experiences and business outcomes.

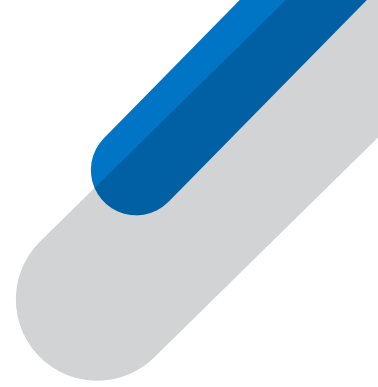
AI can do all of that and more when turned loose on the data you already generate from digital touchpoints, customer behavior, marketing performance, and sales.

With the right data, AI gives marketers unprecedented capabilities.

These capabilities include performing a range of artificially intelligent tasks that have the potential to turn any brand into a customer experience powerhouse, including:

- **Planning:** Building intelligent strategies.
- **Production:** Creating intelligent content.
- **Personalization:** Powering intelligent consumer experiences.
- **Promotion:** Managing intelligent cross-channel promotions.
- **Performance:** Turning data into intelligence.

Wherever data lives in a marketing organization (or the company as a whole), AI has the power to use that data to supercharge a range of business outcomes that can help you:



- Accelerate revenue growth.
- Create personalized consumer experiences at scale.
- Drive costs down.
- Generate greater return on investment (ROI).
- Get more actionable insights from marketing data.
- Predict consumer needs and behaviors with greater accuracy.
- Reduce time spent on repetitive, data-driven tasks.
- Shorten the sales cycle.
- Unlock greater value from marketing technologies.

And by applying AI to just one area of marketing, you have the opportunity to both improve performance and catalyze wider digital transformation.

Top AI Use Cases for CMOs

How do you actually use AI to drive digital transformation?

There are literally hundreds of ways to use AI for marketing—or for any part of your business driven by data. But, there are a handful of core marketing use cases where AI can start making a huge impact for any CMO. These are high-impact areas with commercial AI technology available to drive performance starting today.

ADVERTISING

Predict ad performance and efficiently manage campaigns.

AI can analyze your advertising performance, spend, and audience data from your ad platforms—and it can do it at scale. It can then use that information to tell you what's working, what might work next, and what to do about it. Language and visual AI tools can even write ad copy for you or build hundreds of ad creative variations in seconds.

Today, you can use AI advertising tools to:

- Allocate budget to the right audiences and channels.
- Find new audiences interested in your ads.
- Manage and adjust budget automatically.
- Predict which ads work before you launch.
- Scale one piece of creative across platforms and regions.
- Write ad copy and copy variations.

The result is cheaper and more effective ad campaigns in less time.

ANALYTICS

Get priceless insights from your data.

Pattern recognition and prediction are at the heart of what AI can do. Currently available AI tools use pattern recognition to process massive amounts of your website and customer data, then extract valuable information that humans often miss. AI can also use this data to make predictions about which actions, pages, or users drive the most performance.

AI-powered analytics tools empower marketers to:

- Analyze competitors' websites and marketing activities.
- Automatically answer common questions about data.
- Create comprehensive profiles of valuable users and customers.
- Identify changes in data that humans should pay attention to.
- Predict what users want to see, do, read, or buy next.
- Understand and segment target audiences.

With AI-powered analytics, marketing leaders finally have the ability to extract maximum value from the data at their fingertips.

CONTENT MARKETING

Create and personalize content at scale.

No matter what types of content you create or promote, there's a good chance AI can help you do it better. AI-powered language is one of the top use cases for AI. Today, AI can not only understand natural language in written, video, and audio form, it can also write and speak.

This opens up powerful AI use cases for content marketers, empowering them to:

- Align content with user intent.
- Create and edit audio and video.
- Optimize content for search and voice.
- Personalize content recommendations for each and every website user.
- Personalize the right language to the right users in every marketing message.
- Research and create content calendars and strategies.
- Suggest content topics and brainstorm content angles.
- Write and edit blog posts, landing pages, webpages, and content.

Thanks to AI, it's never been easier to create, personalize, and scale a content marketing program.



CUSTOMER EXPERIENCE

Personalize exceptional digital experiences across channels.

Designing an exceptional customer experience today without smarter technology is impossible. Consumers demand always-on, frictionless experiences with brands. It's impossible to keep up, regardless of your headcount, without technology that can deliver personalization at scale.

With the power of AI-driven personalization, brands now have the ability to tailor messaging, service, and offers to each and every person that engages with them.

A major driver of this is conversational AI like chatbots and intelligent assistants. Using AI, you can do things like:

- Analyze data to improve experience quality.
- Answer questions, solicit feedback, and offer intelligent searches for customers.
- Direct customers to relevant resources, content, and products.
- Field customer questions and comments.
- Personalize messaging and offers to individual customers.
- Predict customer churn.
- Unify customer data for richer behavioral profiles.

An always-on, high-quality customer experience is no longer optional in a fully online world. AI makes it possible to provide these types of experiences in effective—and cost-effective—ways.

ECOMMERCE

Sell more of what consumers want, more often.

The predictive power of AI has massive implications for ecommerce, as demonstrated by how Amazon has transformed the online shopping experience through prediction and personalization. Today, brands that sell online can use AI to make predictions big and small, from making macro decisions around inventory to micro-targeting a single user's product preferences.

In ecommerce, AI can:

- Enable virtual try-on and testing.
- Forecast product demand.
- Intelligently manage inventory and fulfillment.
- Make product search and discovery more intelligent.
- Predict which products, features, and prices will succeed in the market.
- Personalize product features and qualities to individual preferences.
- Personalize product recommendations to individual consumers.

The beauty of ecommerce AI solutions is that many existing platforms offer them or integrate with them. Amazon's personalization AI is available for purchase and Shopify's integration ecosystem has plenty of AI apps to plug into a current store.

EMAIL MARKETING

Intelligently segment and send more successful email messages.

Every brand sends email, and every brand that sends email should be using AI. That's because most email marketing that's done without AI functions on educated guesswork. What subject lines work best? What content will perform? Who should we send to and when?

AI removes the head-scratching and creates high-impact email campaigns. With it, you can:

- De-duplicate and clean up email list data.
- Personalize email content for individual prospects or customers.
- Personalize email send times to individual prospects or customers.
- Write email newsletters automatically.
- Write email subject lines that improve open rates.
- Write portions of emails or entire emails automatically.

There's no longer any need to hit send and pray. AI has changed the level of performance and predictability possible in email marketing.


SOCIAL MEDIA MARKETING

Drive more social engagement and reach at scale.

Social media platforms rely on AI to populate your feeds with content you'll engage with. But AI is also used by brands to create that content and get consumers to engage with it more. By using AI social media tools, you can:

- Automatically create social posts and ads.
- Determine which posts and types of content work best.
- Develop the right messaging and creative for each platform and user.
- Find the right influencers for the right audience.
- Identify your brand logos and visuals in consumer posts.
- Manage mentions, comments, and engagement.
- Measure brand sentiment, consumer sentiment, and market trends.
- Scale up social post and ad creation.

Don't worry: AI doesn't remove humans from the loop. Social success depends more than ever on authentic human engagement from individuals and brands. AI just makes the process easier and more intelligent.



Total impact of AI
on marketing, sales
and services is
forecasted as

**\$3.3 to
\$6.0T
annually**

SEO

Improve search rankings and appear in more relevant results.

Search engines use AI to determine exactly which search results to show you for any given query at any given time. It only stands to reason you'd use AI to make sure you show up in the right place. Today, AI for SEO can:



- Automatically identify and address technical SEO factors.
- Create and optimize content for voice search.
- Identify core topics and keywords to cover in new content to rank.
- Identify key ranking factors needed to own search results across topics.
- Optimize existing content to rank better.
- Quickly update and optimize local search results across locations.
- Perform keyword research and construct keyword databases.

Human marketers understand best what consumers are looking for in comprehensive, compelling content, and give them what they want. AI understands best what search algorithms are looking for when ranking search results, and gives them what they want. It's the perfect marriage of human and machine.

Now that you have an idea of AI use cases, how should CMOs think about deploying and scaling the technology? We've got you covered in the next section.

Adopting and Scaling AI for CMOs

In 2018, McKinsey Global Institute evaluated more than 400 AI use cases across 19 industries and nine business functions.¹⁴ Of the nine functions, marketing had the highest potential forecast of annual value created for businesses—a number estimated in the trillions yearly. When factoring in sales and customer service applications, the total impact of AI on marketing, sales, and service was forecast at \$3.3 - \$6.0 trillion annually.

Different industries will vary, but the sheer size of this number should offer you a reference point to consider the tangible financial impact AI can have on your business. Any business with frequent digital interactions with customers will see the greatest potential returns for AI by better personalizing digital experiences.

But while the financial reward for adopting and scaling AI is significant, the reality is that most businesses are still in the infancy of AI adoption.

According to Marketing AI Institute's 2021 State of Marketing AI Report, 52% of marketers say AI is very or critically important to the success of their marketing in the next 12 months. But only 17% said they were in the scaling phase of marketing AI transformation, characterized by wide-scale adoption of AI that is consistently producing efficiency and performance results.

The learning curve and costs associated with deploying AI are major barriers to entry for many marketing leaders and businesses. However, the early movers who crack the code of how to profitably adopt and scale AI can build nearly insurmountable competitive advantages.

However, the window of opportunity to seize an early adopter advantage is getting smaller.

Now is the time to put AI at the foundation of your marketing program.

AI will reshape how organizations work in the future. It won't just augment your team members—it will literally be one of your team members.

In the near future, humans will work hand-in-hand with intelligent systems to play to each other's strengths. Humans will increasingly offload repetitive tasks and data-driven predictions to machines. Machines will in turn provide guidance that humans will follow to successfully complete the high-value strategic and creative tasks they're best at.

Roles and organizations will change as a result of this division of labor. The marketer of tomorrow will need to understand how to adopt and scale AI in order to build the hybrid human/machine teams required to compete.

Our framework for adopting and scaling AI shows you how.

¹⁴ [Notes from the AI frontier: Applications and value of deep learning](#)

The 10-Step Framework

This framework is excerpted and adapted from Marketing Artificial Intelligence: AI, Marketing, and the Future of Business by Paul Roetzer and Mike Kaput.

Marketing Artificial Intelligence draws on years of research and dozens of interviews with AI marketers, executives, engineers, and entrepreneurs. Roetzer and Kaput present the current potential of AI, as well as a glimpse into a near future in which marketers and machines work seamlessly to run personalized campaigns of unprecedented complexity with unimaginable simplicity. [You can order the book here.](#)

1. THINK STRATEGICALLY

AI needs to solve real business problems.

There's no magic to AI, despite its powerful capabilities. Your marketing doesn't just become smarter by buying an AI tool. And there's no single AI platform to replace all of your existing martech.

Instead, AI performs narrow, specific tasks at superhuman levels, so in all likelihood you'll be adopting a number of different tools for different use cases.

That means you have to map out a strategic vision first, one that includes real business cases for AI that directly impact costs and revenue. Then, you must begin patiently experimenting with tools that have the potential to realize that strategic vision, with the understanding your martech stack will likely expand, not contract.

2. VIEW DATA AS ESSENTIAL TO SUCCESS

Data is at the heart of all AI adoption and scaling.

All AI adoption and scaling efforts start and end with assessing opportunities to get more out of your data.

You'll want to look at every aspect of your marketing program that uses data—or should be. You'll want to look at how data is acquired, cleansed, labeled, and structured. You'll also want to consider where it is stored and how it might be used to make your marketing smarter. Your data strategy must also consider privacy concerns, data security, and issues around biased datasets.

In short, once you have a strategic vision, your next step is to get your hands dirty by documenting where all of your data lives and what it looks like.

3. BECOME AN INFORMED BUYER OF AI-POWERED TECHNOLOGY

Marketers who lack confidence in evaluating AI will struggle to adopt and scale it.

At the end of the day, AI is just smarter marketing technology. But you need to understand how AI is smarter in order to confidently evaluate it for your adoption and scaling needs.

Just because marketing technology companies claim they use AI, machine learning, or deep learning doesn't necessarily mean their solutions are more intelligent than what you're already using. Not to mention, some companies have overhyped branding that exaggerates what their AI is capable of doing.

You'll want to ask vendors several (or all) of the following questions to start understanding if what they offer does what they say it does.

- How does the vendor use AI (i.e. machine learning, NLG, NLP, deep learning, etc.) in its products?
- What are the primary marketing use cases for the company's AI-powered solutions?
- What makes the vendor's solutions smarter than traditional approaches and products?
- Are there any minimum requirements (e.g. for data or list size) to get value out of the technology?
- What data does the technology use and/or need?
- How does the technology improve over time?
- What training is needed for our team? Does the vendor provide it?
- Will we need additional outside support to use the technology?
- Do you integrate with other technologies in my current tech stack?

4. PRIORITIZE USE CASES TO PILOT

AI pilot projects for narrow use cases build a foundation for success.

AI is built to do specific tasks, like optimizing email send time or writing ad copy. Think about AI adoption and scaling on a use case basis. Document the individual tasks your team could do in a more intelligent way, then begin to search out AI tools for those use cases.

Your initial AI use cases form the basis of your AI pilot projects. It rarely makes sense to pursue company-wide AI transformation right out of the gate. This type of transformation is extremely long, costly, and risky. Instead, it's important that your first pilot projects with AI focus on impact and attainability.

These pilots stand the best chance of success because they're feasible and meaningful. If they succeed, they help your company gain familiarity with AI and see its value, creating momentum for further adoption and scale.

In this stage, think about stacking a series of successful pilot projects to build a strong foundation of support for marketing AI in your company.

5. DEFINE PRIORITY BUSINESS GOALS AND CHALLENGES

AI enables two primary business outcomes: reducing costs and accelerating revenue.

For many organizations starting out, cost-saving use cases and pilot projects are likely going to be the most logical for gaining early wins and executive support. However, as you begin to scale, you'll want a vision for how to use AI to grow revenue through applications that improve customer experience and identify new markets.

Here are some common AI cost-saving and revenue-accelerating outcomes to consider aiming toward:

- Create personalized consumer experiences at scale.
- Generate greater campaign ROI.
- Improve customer retention.
- Increase lead volume and quality.
- Shorten sales cycles.

Any outcome that directly impacts costs or revenue is a good candidate for an AI pilot.

6. EDUCATE AND ENGAGE LEADERSHIP

Early setbacks are normal, and cannot be allowed to stall long-term AI plans.

There is a reasonable probability that one or more early pilot projects won't meet the goals your team sets. This cannot stop you from adopting AI. To make sure it doesn't, you'll want to get your leadership team involved in the process from the start.

They must understand the potential short-term challenges, embrace the value of learning through experimentation, and provide the necessary resources to succeed. This support becomes easier to secure when you have clear plans, communicate with consistency and clarity, and always connect AI projects to business goals that matter to leadership.

7. REIMAGINE YOUR MARKETING TEAM

Your marketing team five years from now may look nothing like it does today.

In coming years, AI-focused roles—like marketing AI specialist, AI ops leader, AI trainer, machine manager, recommendation engine director, director of deep learning, VP of augmented intelligence, and chief algorithms officer—could all find their way into your organizational structure. In the process, they will redefine the knowledge and skills needed to drive growth.

Every business in every industry is susceptible to being obsoleted by someone who uses AI to build a smarter business model, and the talent organizations they build along the way. The time is now to start taking the steps needed to reimagine roles and career paths. It's also time to start identifying AI-driven marketing agencies and consulting firms that can help you level up your capabilities while you invest in upskilling your team.

8. TRAIN YOUR TEAM AND EXPLORE AI TOGETHER

Team education is key to unlocking AI's value for your company.

Marketing AI Institute's 2021 State of Marketing AI Report shows that 70% of marketers say lack of education and training is the top barrier to AI adoption. A full 82% say they don't have internal AI-focused education and training.

Yet, AI will be integrated into every aspect of marketing, impacting the roles and responsibilities of every professional. If you are going to unlock the value AI can create, you will need education programs designed to advance your entire marketing team.

AI education in the enterprise needs to be a top priority and a constantly evolving initiative as the technology advances at such a rapid pace. The knowledge and skills your team needs will be a moving target, and marketers will have to constantly upgrade themselves to stay ahead of the curve and remain relevant.

And that education must look a lot different than the marketing education of the past. The new age of marketers won't just need to understand marketing. They'll also need to be proficient in data analysis and be able to work with AI to run marketing experiments.

9. FOCUS ON MUTUAL LEARNING BETWEEN HUMANS AND MACHINES

Companies that win with AI are the ones that learn alongside machines.

Companies that outpace their peers with AI focus on continuous organizational learning, specifically creating, retaining, and transferring knowledge between humans and machines, according to research from MIT Sloan Management Review.¹⁵ These organizations are learning how to systematically change processes based on learning with the outputs provided by machines.

According to the research, these organizations share three essential characteristics:

- They facilitate systematic and continuous learning between humans and machines.
- They develop multiple ways for humans and machines to interact.
- They change to learn, and learn to change.

In fact, the organizations that invest in these activities are 73% more likely to achieve a significant impact with AI.

10. CONSIDER HOW AI CAN MAKE YOUR BRAND MORE HUMAN

AI can be used for good or for evil, and the outcome is up to you.

In the process of making marketing more intelligent, AI has the potential to make brands more human by enabling marketers to focus increased time and energy on listening, relationship building, creativity, empathy, culture, and community. At the end of the day, AI should make us better people, professionals, and brands.

However, this won't happen without a focus on privacy, ethics, and morals.

Used in the right way, AI can actually preserve consumer privacy, allowing brands to speak to customers without collecting intrusive data about them. It has the potential to help uncover what consumers respond to, without invading their personal lives. AI can even be the perfect bridge between the consumer who wants to be protected and wants brands to speak to them in personalized ways.

In fact, we believe AI will have a disproportionately net positive impact on industry and society. But it will alter career paths, shift jobs, and chip away at consumer privacy. We must be willing to have the hard conversations as an industry now, to make sure we do not ruin what will be the most transformative technological shift we will experience in our lifetimes.

Those conversations start at the top, with you leading them.





It's Time to Become a Next-Gen Marketing Leader

You have a chance to be a pioneer in one of the most profound technological shifts in human history.

CMOs are in a rare position to create change, to reinvent what it means to be a marketer. You don't have to become a machine learning or data science expert to take advantage of what AI enables. You simply need to understand what's possible with smarter technologies—and apply that knowledge to your business and career.

The reality is that tomorrow your career, campaign strategies, daily tasks, budgets, and tech stack will look a lot like today. And next week will be similar to the week before. But month by month, year by year, the marketing industry and profession will slowly, and then suddenly, look nothing like it does today.

As AI advances what's possible with technology, a next generation of marketing leaders is emerging.

These leaders aren't defined as next-gen marketing leaders because of age, but rather because of their approach to embracing change and applying smarter technologies.

Next-gen marketing leaders use AI to deliver the personalization and experiences modern consumers expect, unlock previously unimaginable creative possibilities, and drive efficiency, revenue growth, profits, and societal impact that the rest of the C-suite demands. The marketing leaders who take action have the opportunity to create a significant and sustained competitive advantage for their businesses and themselves.

The choice is yours.

Will you embrace change?

Will you commit to unlocking your true potential in your company and career?

Will you become a next-gen marketing leader?



About Marketing AI Institute

[Marketing AI Institute](#) is an online education and event company that makes AI approachable and actionable to marketing leaders around the world.

The Institute owns and operates [Marketing AI Conference \(MAICON\)](#), a global event that attracted 300 marketing leaders from 12 countries in its inaugural year, and [AI Academy for Marketers](#), an online education platform and community built to help marketers understand, pilot and scale AI.

Since its launch in 2016, Marketing AI Institute has educated tens of thousands of marketers on the present and future potential of artificial intelligence, and connected them with AI-powered technologies to drive marketing performance and transform their careers.

Today, our weekly newsletter subscriber list includes marketing leaders from major brands such as Accenture, Adidas, Adobe, Disney, Ford, IBM, KPMG, LEGO, LinkedIn, MasterCard, Mayo Clinic, Microsoft, Nasdaq, Nvidia, Oracle, and Samsung.

Marketing AI Institute's founder and CEO is Paul Roetzer. Roetzer is founder and CEO of Marketing AI Institute, and founder of Ready North (formerly PR 20/20), HubSpot's first partner agency. He is the author of *Marketing Artificial Intelligence* (Matt Holt Books, 2022) *The Marketing Performance Blueprint* (Wiley, 2014) and *The Marketing Agency Blueprint* (Wiley, 2012); and creator of the Marketing AI Conference (MAICON).

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About Persado

[Persado](#) is the only Motivation AI platform that enables personalized communications at scale to inspire each individual to engage and act. The world's biggest brands including J.P Morgan Chase, Michaels, Marks and Spencer, Dropbox, Audible, and Verizon rely on Persado to generate hyper-personalized communications. Organizations that use Persado reach a tipping point in their ability to understand the customer, generating powerful, on-brand content and communications, and drive tectonic value with the world's most powerful machine learning optimization and personalization capabilities.