

THE CMA AI MASTERY SERIES

MANAGING AI AGENTS IN MARKETING

AUGUST 2026

This playbook empowers marketers to implement AI in ways that earn regulatory confidence, maintain strong brand reputation, and foster consumer trust.

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WHAT AI AGENTS UNLOCK

An AI agent is a project manager. You give it a goal — qualify leads, repurpose a campaign, optimize variants across five channels — and it plans the steps, acts, adjusts when conditions change, and reports back. No manual handholding between every task.

Unlike traditional marketing automation, where input A always produces output B, agents are adaptive: they set sub-goals, make decisions mid-execution, and act across multiple systems at once. The quality of what agents produce is limited by how clearly you direct them. The marketer who learns to set precise goals, define firm boundaries, and build in the right checkpoints will consistently outperform.

The playbook shows you how. Here is where most teams see results first:

1.

REPORTING AUTOMATION

Saves 20+ hours each
month after setup

2.

LEAD QUALIFICATION

Instant scoring cuts
manual SDR time

3.

AD BID MANAGEMENT

Real-time optimization
reduces wasted spend

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WHEN AND WHAT TO AUTOMATE

Start where volume is high, risk is low, and steps are predictable. The 30-day pilot gives you a structured on-ramp — foundation workflows first, then revenue-driving automation once you have confidence in the outputs.

WEEKS 1–2

Foundation workflows: basic reporting, intent-based routing, approval workflows

WEEKS 3-4

Revenue-driving automation: lead qualification and scoring, ad bid management

The three handoffs below are consistently the highest-value starting points for marketing teams new to agentic work.

THREE HANDOFFS WORTH AUTOMATING FIRST:

1

MARKETING TO SALES

Lead scoring and routing hand off qualified leads automatically

2

CONTENT TO DISTRIBUTION

Approved content is scheduled and published across channels

3

PERFORMANCE TO OPTIMIZATION

Bid and budget adjustments respond to live performance data

04

WHICH HANDOFFS TO AUTOMATE FIRST

Not every workflow is ready for an agent. Start where the volume is high, the risk is low, and the steps are predictable: lead scoring, report generation, social scheduling, and ad bid adjustments.

	DELEGATE THOSE TASKS	DECISION RULE
FULL AUTONOMY	• Data processing • Bid adjustments $\pm 10\%$ • Report generation • Social scheduling	● Internal and low-risk only
HUMAN IN THE LOOP	• Content drafts • Campaign builds • Creative variants	● Human sign-off before anything publishes
HUMAN-LED	• Brand strategy • Crisis communications • Legal sign-off • Annual planning	● Touches customer trust or public-facing brand

Rule of thumb: if it touches a customer's trust or your brand's public face, a human stays in the loop.

05

THE FIVE SKILLS EVERY AGENT MANAGER NEEDS

These five skills form a new kind of professional literacy. Sharpen them with every agent you deploy.

1. INTENT WRITING

Write the Agent's job description, not a one- time prompt.

2. TASK DECOMPOSITION

Break goals into bounded, auditable steps.

3. OUTPUT VERIFICATION

Score outputs against brand rubrics before errors cascade.

4. ESCALATION JUDGMENT

Know when to stop the agent and flag a human.

5. HUMAN-AI COLLAB DESIGN

Build workflows where agent and humans complement, not compete.

Knowing the skills is the starting point. Knowing when to apply them, how much to trust an output, when to question it and when to step in is where discernment lives. That develops with exposure, not in a training module.

06

CHOOSE TOOLS THAT FIT THE TASK

Before you brief an agent, you need to choose the right platform. In the agentic era, tool selection is an architecture decision. The tools that worked for automation do not automatically work for agency. What matters now is which platform can plan across systems, adapt mid-execution, integrate with your existing stack and give you the governance controls to stay in charge.

FOUR DIMENSIONS TO EVALUATE:

1.

REASONING CAPABILITY

Can it set sub-goals and self-correct?

2.

INTEGRATION DEPTH

Does it connect to your CRM, CMS and data sources?

3.

GOVERNANCE CONTROLS

Can you set hard limits and audit trails?

4.

TIME TO FIRST VALUE

How quickly can you get to a measurable result?

PLATFORM LANDSCAPE

ENTERPRISE SALESFORCE AGENTFORCE

Real-time signals trigger multi-channel campaigns and lead qualification autonomously.

MID MARKET HUBSPOT BREEZE

Social, content and prospecting agents inside the portal — minimal integration lift.

SPECIALIST TOOLS WRITER / TYPEFACE / GALILEO / LANGSMITH

Brand governance, content repurposing, output monitoring and evaluation.

Build-versus-buy starting rule: Start with a vendor-deployed agent. Faster time to value, pre-built integrations, and built-in evaluation frameworks make it the lower-risk entry point.

07

BRIEF YOUR AGENTS LIKE YOU BRIEF YOUR BEST HIRE

This brief is a living document and a learning loop. After every campaign cycle, revisit all four pillars. Did the role product the right output? Did the goal drive the right behaviour? Did the guardrails catch what they needed to? Did the rules give the agent what it need to perform? The answers will refine the brief. That is how your brief gets sharper and how your agents improve over time.

Think of the brief the way you think about onboarding documentation for a new team member: it is never truly finished, and maintaining it deliberately is part of managing your digital workforce. The brief is the contract between the marketer and the agent.

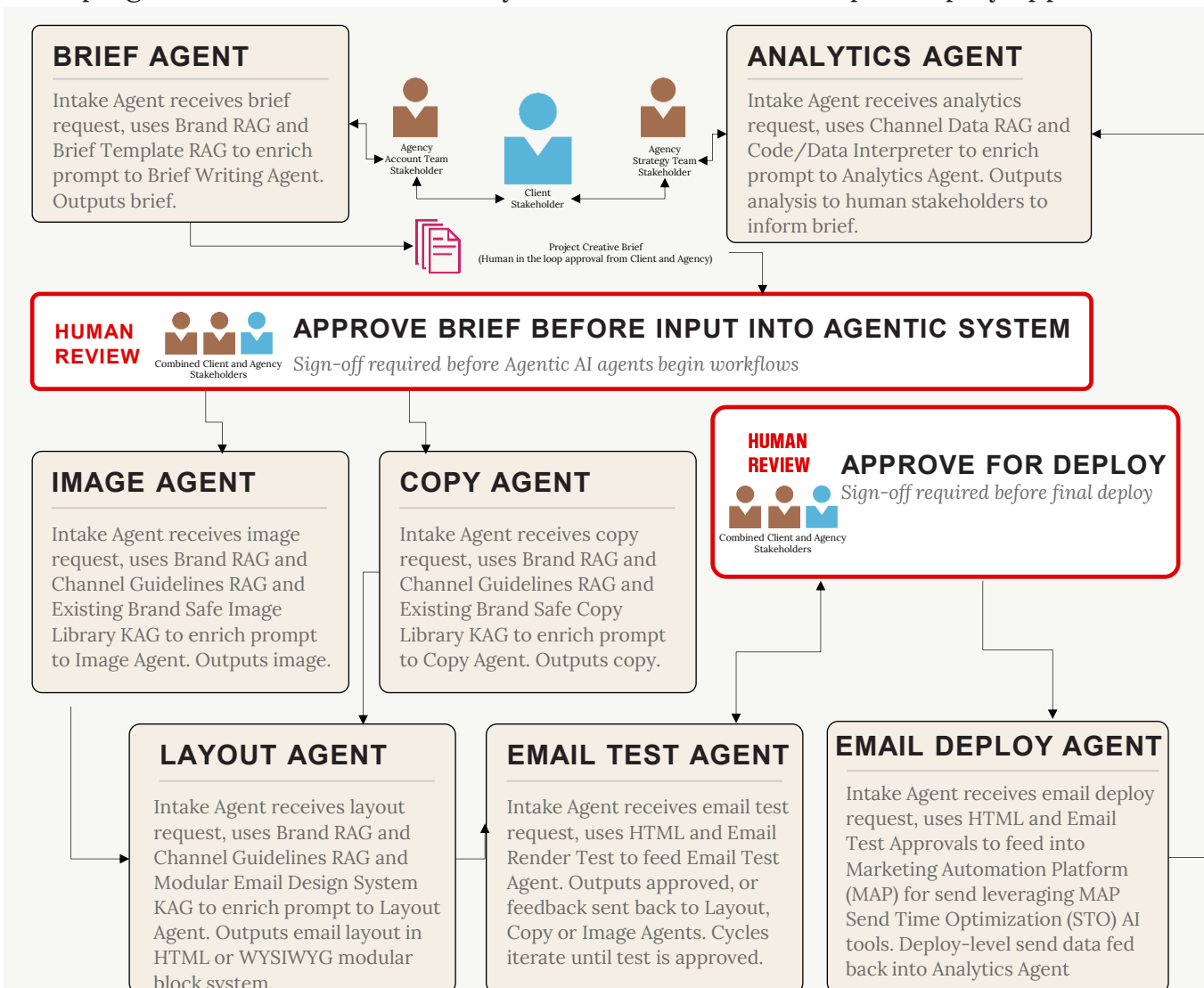
1. ROLE	2. GOAL	3. GUARDRAILS	4. RULES
Define the agent's person with specificity – not a job category, a job title.	Set a measurable outcome with a clear timeframe.	Define what the agent must never do – your non-negotiable hard stops.	Specify which tools the agent can access – gran only what the role requires.
e.g. Senior B2B email strategist, SaaS marketing expertise, Canadian compliance requirements	e.g. Increase email click-through rate by 15% over 30 days	e.g. No competitor names. No publishing without approval. Approved tone only	e.g. CRM/Google Search/ content library/ CMS publishing rights

 **Refine after every cycle**

08

WHAT AN AGENTIC CAMPAIGN LOOKS LIKE

A mid-size Canadian retailer is launching an agentic monthly eNewsletter campaign in CRM. Seven pre-trained agentic teams from Briefing Agent to Email Deploy Orchestration Agent work in concert to automate each step while keeping brand safe on content, creating virtuous loops with performance data, and keeping Humans at the head in key moments like brief and pre-deploy approvals.



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AGENTIC TEAMS DEEP DIVE

Taking our agentic monthly eNewsletter campaign CRM Agentic flow and going one level deeper, here's what happens practically within three of our sample Agentic Teams as we move from conceptual framework to technical blueprint.

CONCEPT

BRIEFING AGENT

Intake Agent receives brief request, uses Brand RAG and Brief Template RAG to enrich prompt to Brief Writing Agent. Outputs brief.

IMAGE AGENT

Intake Agent receives image request, uses Brand RAG and Channel Guidelines RAG and Existing Brand Safe Image Library KAG to enrich prompt to Image Agent. Outputs image.

EMAIL TEST AGENT

Intake Agent receives email test request, uses HTML and Email Render Test to feed Email Test Agent. Outputs approved, or feedback sent back to Layout, Copy or Image Agents. Cycles iterate until test is approved.

BLUEPRINT

BRIEFING AGENT

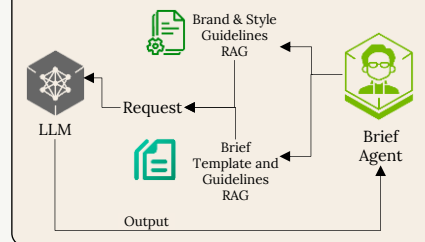
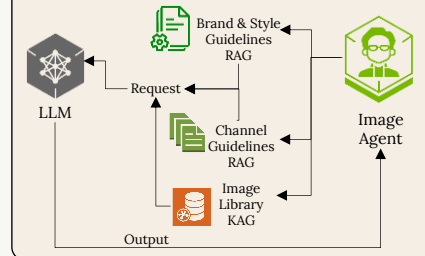
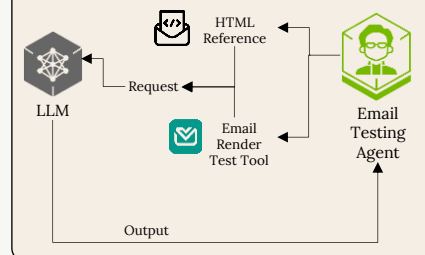


IMAGE AGENT



EMAIL TEST AGENT

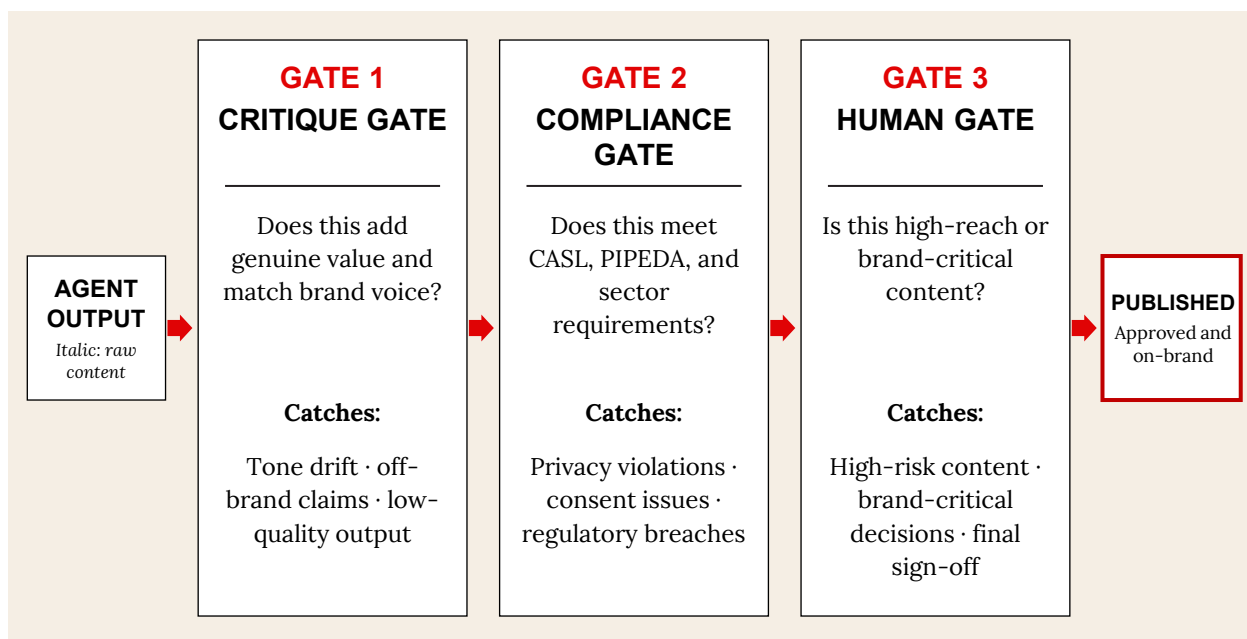


**CHECKPOINTS
ARE YOUR BRAND'S
SEATBELT.
NOT ITS BRAKES.**

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BRAND INTEGRITY AT SCALE

At agentic scale, a PDF style guide is not enough. When an agent fails inside a multi-step workflow, it can make iterative bad decisions that compound before a human ever sees the output. That is why organizations must move from passive documentation to active governance. Agentic RAG (retrieval-augmented generation) forces agents to query a live brand knowledge base before generating any output, anchoring every response to current product facts, approved terminology, and tone specifications.



Human-in-the-loop checkpoints are not optional best practice — they are a must for compliance, especially in regulated sectors like financial services or healthcare.

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TEAM TRANSFORMATION

The introduction of AI agents changes what your team does and what your workday looks like. The marketer who was writing first drafts is now reviewing agent output. The manager who was approving copy is now approving policy, moving away from reviewing every asset to reviewing only the exceptions. The work evolves from doing to curating, from executing to directing.

ACTIVITY	BEFORE	AFTER
Campaign planning	Weeks of briefing, research and creative rounds	Hours of strategy input — variants ready same day
Content production	Human writes, edits, approves, posts	Agent generates — human reviews exceptions only
Media optimization	Weekly manual bid review on Friday afternoon	Real-time adjustment with anomaly alerts
Reporting	Two hours pulling data for Monday meeting	Natural language query — answered in seconds

1 AI AGENT ORCHESTRATOR

Designs workflow architecture

2 AGENT OWNER

Accountable for performance, ROI, and compliance

3 PLAYBOOK ENGINEER

Writes and maintains operating instructions

4 POLICY REVIEWER

Ensures agent actions meet legal and ethical standards

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RECOMMENDED READING AND REFERENCES

CMA REFERENCES

- [Guide on AI for Marketers](#)
- [Setting the Stage on Artificial Intelligence: A Primer on AI for Marketers](#)
- [CMA Accountability Checklists for AI in Marketing](#)
- [CMA Mastery Series: AI Playbooks](#)
- [CMA Generative AI Readiness Survey](#)
- [Canadian Marketing Code of Ethics and Standards](#)

EXTERNAL RESOURCES

- Wharton: [Blueprint for AI Agent Adoption](#)
- Salesforce: [How Agentforce Works](#)
- Nielsen Norman Group: [AI Agents as Users](#)
- Diginomica: [Re-inventing Marketing with Agentic AI McKinsey Method](#)
- Complex Discovery: [From Brand Guidelines to Brand Guardrails](#)
- Braze: [How to Use Agentic AI in Marketing](#)

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THE CMA

This playbook is developed with guidance by the [CMA AI Committee](#) and is part of the CMA's comprehensive AI initiative designed to empower Canadian marketers with the knowledge, skills, and ethical frameworks needed to implement AI responsibly and effectively.

The CMA is the voice of marketing in Canada, and our purpose is to champion marketing's powerful impact. We are the catalyst to help Canada's marketers thrive today, while building the marketing mindset and environment of tomorrow.

We provide opportunities for our members from coast to coast to develop professionally, to contribute to marketing thought leadership, to build strong networks, and to strengthen the regulatory climate for business success. Our Chartered Marketer (CM) designation signifies that recipients are highly qualified and up to date with best practices, as reflected in the Canadian Marketing Code of Ethics and Standards.

For more information, visit thecma.ca.

**THE MARKETER
WHO
MASTERS AI
ORCHESTRATION
OWNS THE
FUTURE.**