AI PLAYBOOK 10

3 Steps to Your Next AI Win

June 2025

Content partially generated by artificial intelligence, refined by human expertise.

This Playbook is part of the CMA's AI Mastery Series, empowering marketers to Implement AI in ways that earn regulatory confidence, maintain strong brand reputation, and foster consumer trust

Transform "AI overwhelm" into focused action

This playbook provides a structured approach to identifying your highest-impact AI opportunity in three manageable steps. Rather than implementing multiple AI solutions simultaneously, this framework helps you cut through the AI noise and pinpoint a real win that delivers immediate value while building organizational confidence for broader adoption.

The methodology transforms overwhelming AI possibilities into a focused action plan, guiding you from initial review of your processes and tasks to 30-day pilot implementation.

By concentrating on the single opportunity most likely to succeed, you create momentum that naturally leads to expanded AI adoption across your marketing operations.

The framework addresses uniquely Canadian considerations including compliance requirements, budget constraints, and integration with existing business systems. The result is a clear, actionable path that moves you from AI curiosity to measurable business impact in weeks, not months.

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Step 1: Task identification

The task identification exercise uses a structured scoring system to evaluate your team's weekly activities across five core marketing functions: content creation, lead generation, social media management, email marketing, and data analysis. Using your pre-session survey data, this could take 15 minutes to one hour depending on the size and complexity of your team, opportunities where AI can deliver immediate impact through automation or quickly prioritizes enhancement of repetitive, time-consuming processes.

Using your team's pre-gathered task inventory, review the three most time-consuming manual tasks in each function. Apply a simple scoring system:
- 3 points for tasks requiring more than 5 hours weekly;
- 2 points for tasks requiring 2 to 5 hours ; and
- 1 point for tasks under 2 hours.

Add a frustration factor : 2 points for tasks team members actively avoid, 1 point for tasks that interrupt creative work and for tasks that require skills not present on your team.

The decision tree then guides evaluation through key questions:
- Does this task require human creativity?
- Can it be broken into repeatable steps?
- Does it involve processing large data volumes?
- Is the output measurable and consistent?

High-scoring tasks that are rule-based and measurable are your priority candidates for AI implementation, as you proceed to Step 2.

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What's your biggest time drain?

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Step 2: AI solution mapping

Solution mapping matches your priority tasks to appropriate AI tools using a four-factor decision framework:
- budget constraints;
- technical complexity;
- integration requirements; and
- team skill levels.

This 30 to 90 minute process ensures tool selection aligns with organizational capabilities while maximizing implementation success probability. Canadian-specific considerations include data residency requirements, CAD pricing, and compliance with federal and provincial privacy legislation.

Budget assessment begins with free and freemium options that deliver significant value for content creation and basic automation. ChatGPT's free tier excels at content ideation, while Canva's AI features handle basic graphic design needs. For teams with modest budgets, consider tools like Jasper for content creation or Buffer for social media management, typically ranging from $50-200 CAD monthly.

Technical complexity evaluation is crucial for implementation success. Beginner-friendly tools require minimal setup and integrate easily with existing workflows, while advanced solutions offer more powerful features but require technical expertise or dedicated training time. The pre-session inventory and team assessment guides tool selection based on your team's current comfort level with new technology and available time for learning and optimization.

Step 3: ROI calculation and implementation

The final step entails transforming tool selection into a concrete implementation plan with clear ROI projections and risk mitigation strategies. This step calculates potential time savings, estimates productivity gains, and creates a 30-day pilot framework that demonstrates value while building organizational confidence for broader AI adoption initiatives.

ROI calculation begins with time savings analysis. If your priority task currently requires 5 hours weekly and AI can reduce that by 60%, you're saving 3 hours weekly or 156 hours annually. Multiply by your team's fully loaded hourly rate to calculate direct cost savings. Factor in quality improvements and productivity gains, research indicates AI-optimized content can improve engagement rates while AI-powered audience segmentation enhances targeting effectiveness.

The implementation template includes four critical components: 30-day pilot project scope with specific deliverables, success metrics definition aligned with business objectives, risk mitigation strategies addressing data privacy and team adoption challenges, and stakeholder communication plan.

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Case study: Task identification

Here is how Sarah, a marketing manager at a Halifax B2B software company, navigated the first step. She sent a 5-minute survey to her team, asking them to list their most time-consuming weekly tasks. She also gathered prior month time-tracking data and noted the team's biggest frustrations from recent check-ins.

Sarah's pre-gathered team data:
- Content creation: Writing blog posts (6 hours), creating social media captions (4 hours), drafting email newsletters (3 hours).
- Lead generation: Researching prospects on LinkedIn (5 hours), personalizing outreach emails (4 hours), qualifying inbound leads (2 hours)
- Social media: Scheduling posts across platforms (3 hours), responding to comments (2 hours), creating graphics (4 hours)
- Email marketing: Segmenting audiences (3 hours), A/B testing subject lines (2 hours), analyzing campaign performance (2 hours)
- Data analysis: Pulling monthly reports (4 hours), analyzing website traffic (3 hours), creating performance dashboards (2 hours)

Sarah's score results:
- Blog post writing: 3 points (6+ hours) + 2 frustration points (team actively avoids) = 5 points
- LinkedIn prospecting: 3 points (5+ hours) + 1 frustration point (interrupts creative work) = 4 points
- Social media graphics: 2 points (4 hours) + 2 frustration points (team lacks design skills) = 4 points

Decision tree analysis:
"Does this require human creativity?" (Partially - strategy yes, first drafts no). "Can it be broken into repeatable steps?" (Yes - research, outline, draft, edit). "Is the output measurable?" (Yes - word count, engagement, SEO scores).

Result: Blog post writing scored highest and passed the decision tree test, making it Sarah's priority for AI implementation in Step 2.

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Quick win identification

The Quick Win Identification Matrix provides systematic prioritization of AI implementations based on impact potential, implementation difficulty, and resource requirements. This scoring framework weighs multiple factors to identify opportunities with the highest probability of success, ensuring your first AI implementation builds momentum rather than creating frustration or skepticism within the organization.

Calculate your Quick Win Score using the formula: (Impact Score × 2) - Implementation Difficulty Score - Resource Score. Impact potential considers time savings, quality improvements, and strategic value. Implementation difficulty assesses technical complexity, integration requirements, and change management challenges. Resource requirements include financial investment, time commitment, and ongoing management needs.

Prioritize implementations scoring 8 or higher for immediate action, consider those scoring 5-7 for future phases, and defer those below 5 until organizational AI maturity increases.

The highest-scoring opportunity becomes your 30-day pilot project, with clear success criteria, measurement protocols, and scaling plans. This systematic approach transforms AI adoption from an overwhelming possibility into focused, achievable action.

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Implementation template

Here is a Quick Win implementation template based on Sarah's results.

Project Overview

Initiative: AI-powered blog content creation using Jasper for first drafts and optimization.
Duration: 30-day pilot with 60-day evaluation period
Team lead: Sarah, Marketing Manager
Budget: $59 CAD monthly (Jasper subscription)
Success criteria: Reduce blog writing time by 50%, maintain quality scores above 8/10, publish 2 additional posts monthly.

Week 1: Setup and training
- Tool setup and configuration
- Team training and initial testing
- Baseline measurement

Week 2: Active implementation
- Production activities
- Weekly deliverables

Week 3: Optimization and scaling
- Process refinement
- Performance testing

Week 4: Evaluation and planning
- Assessment activities
- Decisions points

Implementation template

Success Metrics and KPIs
- Efficiency metrics
- Quality metrics
- Business impact

Risk mitigation
- Technical
- Operational

Next steps and scaling

If successful (based on set metrics):
- Expand to social media content creation using same framework.
- Upgrade to Jasper Teams plan for collaboration features.
- Develop advanced AI content training program for entire marketing team.

If moderately successful (based on set metrics):
- Optimize current blog workflow for additional 30 days.
- Address identified quality or efficiency gaps.
- Test alternative tools like Copy.ai.

If unsuccessful (based on set metrics):
- Conduct detailed analysis of time tracking and quality metrics.
- Survey team for specific pain points and resistance factors.
- Document lessons learned for future AI tool evaluations.

Recommended reading and references

- [CMA Guide on AI for Marketers](#)
- [Setting the Stage on Artificial Intelligence: A CMA Primer on AI for Marketers](#)
- [CMA Accountability Checklists for AI In Marketing](#)
- [CMA Mastery Series: AI Playbooks](#)
- [CMA The State of AI Adoption in Marketing 2025](#)
- [CMA Compliance and Best Practices Guides](#)
- [Forbes Inside Canada's $2.4 Billion Bet to Close the AI Adoption Gap](#)
- [BDC: Facing Down Key AI Challenges](#),
- [Number Analytics: AI Stats Content Marketing Success](#)
- [Iterable: 15+ Stats ROI AI Marketing](#)
- [Adecco Group: AI Saves Workers an Average of One Hour Each Day](#)

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