

AI PLAYBOOK 16

AI data readiness for Canadian marketers

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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

The data stage

The marketing landscape has fundamentally shifted toward AI-powered customer engagement. While 80% of marketers report AI success, data quality challenges remain a significant barrier, with multiple industry studies identifying poor data as a primary impediment to AI implementation.

The difference between AI success and failure isn't about having the most sophisticated algorithms, it's about having quality data that's AI ready.

For Canadian marketers, the stakes for managing data right have never been higher. Poor data quality doesn't just limit your AI potential, it can expose you to compliance risks and regulatory scrutiny.

The three-factor assessment framework

This playbook centers on a practical three-factor assessment framework that evaluates your marketing data across the dimensions most critical for AI success.

Completeness

The first factor, completeness, measures whether you have all the information needed to create comprehensive customer profiles and support AI applications. Calculate null percentages for critical fields like contact information (target: 95% complete), demographic data (target: 85% complete), and behavioural data (target: 85% complete).

Consistency

The second factor, consistency, ensures that the same information is represented identically across all systems and touchpoints. Test for standardized formatting across geographic data (BC vs British Columbia), company names (IBM vs International Business Machines), and campaign naming conventions.

Contextual relevance

The third factor, contextual relevance, evaluates whether your data provides meaningful insights for your specific AI applications, including high-value behavioural indicators like purchase intent signals, engagement patterns, and churn risk factors.

Data inventory essentials

Start by identifying your most important marketing data sources, before evaluating their quality. This inventory becomes your foundation for all subsequent data quality improvements and AI implementation planning.

Customer relationship management (CRM) data includes:

- contact information;
- company details;
- interaction history;
- lead source attribution; and
- sales pipeline data.

Email marketing platforms contain:

- subscriber lists;
- campaign performance metrics;
- behavioural triggers;
- unsubscribe records; and
- A/B testing results.

Web analytics encompasses:

- traffic sources;
- user acquisition data;
- conversion funnel performance;
- user behaviour flows; and
- goal completions.

Advertising platforms hold:

- campaign performance across channels;
- audience targeting parameters;
- creative performance data;
- attribution tracking; and
- budget allocation metrics.

Social media analytics includes:

- follower demographics;
- engagement metrics;
- content performance;
- social listening data; and
- community management records.

Once your core data sources have been identified, the next step is to clarify how each one is managed. For each data source, document the primary owner, access permissions, data refresh frequency, integration points with other systems, and backup procedures.



AI data
readiness is
mission critical.

The consistency test in practice

Data consistency testing reveals how the same information appears across different systems. This systematic approach ensures your data tells a unified story across all marketing platforms.

Customer identity matching

Start with the foundation of your customer data by standardizing how people and organizations are identified across systems. Email addresses follow the same case conventions, and company names are standardized.

Correct format	Inconsistent formats
John Smith	Smith, John J. Smith JOHN SMITH
Great Bank of Canada	GBC Great Bank GB Canada

Geographic standardization

Correct format	Inconsistent formats
BC	British Columbia B.C. british columbia
QC	Quebec Québec PQ
Canada	CA CAN CANADA
A1B 1A1	A1B1A1 a1b1a1 A1B-1A1

Standardized information examples



Export campaign data from all platforms and check for consistent UTM parameter structures and standardized naming.

Standardized campaign structure

Correct format	Inconsistent formats
2025_Q1_Email_ProductLaunch_NewFeatures	email-jan-2024-product Q1-email-launch 2025-product-email
Great Bank of Canada	GBC Great Bank GB Canada

UTM parameter standards

Parameter	Correct format	Inconsistent formats
utm_source	Google, Facebook, LinkedIn	Google FB LinkedIn.com
utm_medium	email, social, paid-search	Email Social Media PPC

Date format standards

Correct format (ISO 8601)	Inconsistent formats
2025-07-10	07/07/2025 07/10/2025 July 10, 2025

Don't forget about standardized time zone information included in timestamps, and clear fiscal versus calendar year distinctions.

The Single Source of Truth Test involves selecting five customers and building unified profiles using data from all systems, documenting how many different versions exist, identifying which system has the most complete data, and measuring manual effort required to reconcile differences.



Data governance RACI chart

Establish clear ownership and accountability using this RACI framework.

Activity	Responsible	Accountable	Consulted	Informed
Daily data entry	Marketing Coordinators	Marketing Manager	Data Analyst	Marketing Director
Weekly quality audits	Data Analyst	Marketing Manager	IT Support	Marketing Director
Monthly reporting	Marketing Manager	Marketing Director	Sales Manager	Executive Team
Quarterly standards review	Marketing Director	CMO	IT Director	All Department Heads
Annual system upgrades	IT Director	CTO	Marketing Director	Executive Team

Legend: Responsible (does the work) | Accountable (signs off and is ultimately answerable) | Consulted (provides input and expertise) | Informed (needs to be kept updated)

This chart clearly shows that data quality is not owned by one team; it's a shared responsibility across departments with clear escalation paths and accountability measures. Regular review and updates helps keep teams aligned, even as priorities shift.

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The 90-day sprint: Days 1–30 foundation

This 90-day sprint is a structured approach to get your data from its current state to AI ready with measurable results. Each 30-day phase introduces manageable changes while reinforcing previous improvement, giving marketing operations time to adapt.

Week 1 (establish baseline)

Complete the 3-Factor AI Readiness Audit using the frameworks provided, document current data sources and ownership using the inventory template, calculate baseline completeness, consistency, and context scores, and identify your top 3 data quality issues impacting business outcomes.

Week 2 (quick wins implementation)

Apply immediate cleanup techniques using Excel and Google Sheets, standardize contact names and company information using PROPER and TRIM functions, remove obvious duplicates using built-in deduplication tools, and implement basic form validation on new data collection.

Week 3 (tool evaluation and setup)

Download and test OpenRefine or other advanced cleaning tools, set up data quality monitoring dashboards in your CRM, create standardized naming conventions for campaigns and assets, and begin documenting data governance processes using the RACI framework.

Week 4 (team alignment and training)

Present audit findings to stakeholders using the business case framework, train team members on new data entry standards, establish weekly data quality check routines, and create accountability measures with clear ownership assignments.

Days 31–60: Advanced cleaning

Weeks 5-6 (data cleaning)

Focus on deep data cleaning using advanced tools to tackle:

- complex deduplication (finding and merging records);
- geographic and demographic standardization using fuzzy matching techniques (tools that recognize when different entries likely refer to same thing);
- automated near-duplicate identification (systems that flag potential matches like ABC Bank and All Business Bank for review); and
- master data templates for consistent formatting across all systems.

Week 7 (system integration and automation)

Set up automated data validation workflows that check data entries in real time, cross-platform consistency checks in your CRM, email platform, and analytics, create data quality threshold alerts, and ensure ongoing data backup and recovery procedures are scheduled and tested.

Week 8 (compliance alignment)

Audit consent records and update privacy policies to reflect AI use, implement granular consent tracking mechanisms for different AI applications, review data collection practices for compliance, and create standardized processes for handling data subject requests including access, correction, and deletion. This phase transforms your data from cleaned information into a compliant, AI-ready asset that supports both business objectives and regulatory requirements.

Days 61–90: Governance and optimization

Weeks 9-10 (governance framework implementation)

Finalize the RACI chart with specific role assignments and escalation procedures, establish regular audit schedules with monthly deep dives and weekly quick checks, create data quality scorecards tracking completeness, consistency, and context metrics, and implement change management processes for evolving data standards.

Week 11 (performance optimization)

Analyze the impact of data improvements on campaign performance metrics, optimize data collection processes based on AI readiness requirements, refine cleaning procedures based on lessons learned from the first two months, and plan for Phase 1 AI implementation initiatives.

Week 12 (sustainability and scale)

Document all processes and create comprehensive training materials for new team members, establish quarterly review cycles for data governance with executive reporting, plan the next phase of AI implementation based on your improved data foundation, and celebrate wins while communicating success metrics to stakeholders. This final phase ensures that your data quality improvements become permanent organizational capabilities rather than one-time projects.

Privacy compliance essentials

When taking steps to ensure their data is AI-ready, marketers must be compliant with privacy laws.

PIPEDA and the OPC

The Personal Information Protection and Electronic Documents Act (PIPEDA) and related guidelines issued by the federal privacy commissioner (OPC) require organizations to obtain meaningful consent for the collection, use and disclosure of personal information. This means informing individuals in a user-friendly way so they understand what they are consenting to. This includes explaining how AI systems will analyze their data, create profiles, and make automated decisions about personalized marketing experiences.

The OPC's principles for responsible AI technologies specify that personal information be collected, used and shared only for purposes that a reasonable person would consider appropriate in the circumstances. AI systems should not use generative AI systems that profile in a manner that could lead to unfair, unethical or discriminatory treatment, or result in threats to fundamental rights and freedoms. Where possible, systems should use synthetic or deidentified data, and should not re-identify any previously de-identified data.

Quebec's Law 25

Individuals must be informed when personal information is used to render a **decision** based **exclusively** on **automated processing**. Individuals can request more information and submit observations.

Before deployment of an AI tool:

- ☐ Conduct a Privacy Impact Assessment;
- ☐ Ensure your privacy policies and consent requests are in plain language;
- ☐ practice data minimization by collecting only necessary information; and
- ☐ ensure human oversight of AI-driven decisions that significantly impact individuals.

ROI scorecard, success metrics and next steps

Track progress across three dimensions:

- data quality metrics;
- operational efficiency; and
- business impact.

Data quality metrics include completeness scores with industry-standard targets of 95% for essential fields and 85% for nice-to-have fields, consistency scores targeting 98% standardization across all systems, and context relevance scores aiming for 90% of collected data having clear AI applications.

Operational efficiency improvements typically include significant reductions in manual data processing time through automation, faster list creation through unified customer data platforms, fewer campaign errors through standardized workflows, and reduced support issues through improved customer experience.

Business impact metrics should be established based on your organization's baseline performance and industry benchmarks, with companies leveraging AI seeing 20-30% higher campaign ROI as a validated outcome.

AI needs quality data, but it also needs marketers asking the right questions, connecting the right insights and providing the human lens and context.

Whether you're preparing your first AI-powered campaign or scaling your customer insights engine, by working through this playbook you have laid a strong foundation to be AI ready.

Recommended reading and references

CMA Resources

- [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 Transparency for Consumers Guide](#)
- [CMA Application of Law 25 to Marketing Activities Guide](#)

References

- Blog Hurree: [Measuring the ROI of AI in Marketing: Key Metrics and Strategies for Marketers](#)
- Office of the Privacy Commissioner of Canada: [Privacy and artificial intelligence](#)
- Number Analytics: [AI Stats Content Marketing Success](#)
- Forrester: [B2B Marketers Expect To Do More With More – But IT's Not As Good As It Sounds](#)
- Cognism: [Data Quality Issues and Contact Data Cleansing](#)
- Martech: [The Marketer's Guide to Conquering Data Quality Issues](#)
- Baserow: [Top Data Cleaning Tools for Teams](#)
- Improvado: [Marketing Data Cleansing Best Practices](#)
- Bizbot: [How To Measure Data Quality KPIs](#)
- Stanford HAI: [AI Index 2025 Report](#)

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.

As the voice of Canadian marketing, the CMA champions our profession'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 CMA's Canadian Marketing Code of Ethics and Standards.

We represent virtually all of Canada's major business sectors, and all marketing disciplines, channels and technologies. Our Consumer Centre helps Canadians better understand their rights and obligations.

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delivers
measurable
results.
Activate your
next campaign.

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