

**AI PLAYBOOK 40**

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# AI Quick-Start for Marketers Part 2: Scale Your Foundation

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[theCMA.ca](https://www.thecma.ca)

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

# Scale your AI impact with three advanced workflows

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You've implemented your first AI workflows from [AI Quick-Start for Marketers: Part 1](#) and delivered measurable value. Now expand capabilities across content operations, analytics, and demand generation. This playbook provides three advanced workflows building on your foundation.

Before you start, this playbook assumes you've completed at least one workflow from Part 1. If you haven't established baseline AI governance, prompt libraries and measurement frameworks, start there first.

## **What you'll implement:**

- AI-powered content repurposing to maximize ROI from existing assets
- Automated performance reporting that surfaces insights without manual analysis
- Predictive lead scoring to focus sales and marketing on highest-probability opportunities

Each workflow includes setup time, expected impact, readiness checklist and week-by-week implementation guidance. Continue following the responsible AI principles from Part 1: human oversight, transparent data usage, brand voice consistency and decision accountability.

# Workflow 4: Multiply content ROI

Workflow 4 turn assets — webinar recordings, research reports, long-form blogs (1,500+ words), whitepapers, case studies, product launches—into 8–10 derivative pieces across channels using AI to extract insights, and adapt tone, length, and format for each platform.

## Readiness checklist:

- Library of existing high-value content assets
- Established brand voice guidelines from Part 1 prompt library
- Content calendar identifying distribution channels
- Team member assigned to quality review and editing

## Implementation:

Timing	Actions
Weeks one to two	Select three to five high-performing assets from past 12 months, audit which formats need content (social, email, video), test repurposing one asset across three formats (use Canva/Adobe for visuals, ChatGPT/Claude for text, Descript for audio/video), establish review workflow
Weeks three to four	Build reusable prompts for each type (blog to social threads, webinar to email sequence, report to infographic script), create approval workflow distinguishing what needs human review versus auto-publish, batch-process five assets into 30–40 derivative pieces, measure engagement rates against original format content

**Scaling next:** Integrate with content management system for automated publishing, create repurposing workflows triggered by new asset publication, build cross-functional prompt library, establish content attribution tracking.

# Workflow 5: Performance reporting

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Workflow 5 replaces manual reporting with AI insights analyzing campaign performance, conversion funnels, budget efficiency, ROAS, content engagement, and audience behaviour, flagging anomalies, identifying patterns, and recommending actions automatically.

## Readiness checklist:

- Six months of historical campaign data with consistent tracking
- Google Analytics 4 or marketing automation platform with API access
- Defined KPIs, performance thresholds from Part 1 measurement framework
- Stakeholder alignment on report format and frequency

## Implementation:

Timing	Actions
Weeks one to two	Export six months of campaign data, identify top five questions stakeholders ask monthly (What's working? What's underperforming? Where should we reallocate?), create baseline manual report for comparison, test AI analysis with one month of data using ChatGPT or Power BI Copilot
Weeks three to four	Build automated data pipeline from analytics platforms to AI tool, create report templates with natural language summaries and visualizations, establish anomaly detection thresholds (20% drop triggers alert), schedule automated weekly digest reports, compare AI insights against manual analysis for accuracy

**Scaling next:** Add predictive forecasting, create role-specific reports, integrate cross-channel attribution modeling, build automated optimization recommendations.

# Workflow 6: Predictive lead scoring

Workflow 6 replaces manual lead qualification with AI conversion probability scoring analyzing website visits, content downloads, demo requests, email engagement, and firmographics to route hot leads to sales while marketing nurtures systematically. Setup is three to four weeks and ideally leverages six months of historical lead data.


## Readiness checklist:

- Six months of lead data and conversion outcomes
- Marketing automation platform tracking behavioural engagement
- Sales and marketing agreement on lead qualification criteria
- Conversion tracking from first touch through closed deal

## Implementation:

Timing	Actions
Weeks one to two	Export lead data with outcomes (converted, lost, nurturing), identify which behaviours correlate strongest with conversion, manually score sample of 100 leads for comparison to validate approach.
Weeks three to four	Enable predictive lead scoring in chosen platform, establish score thresholds (80+ routes to sales, 50–79 marketing nurture, below 50 long-term nurture), create automated workflows routing leads based on scores, train sales team on interpreting scores, and prioritizing outreach, measure conversion rate differences between score tiers

**Scaling next:** Add churn prediction for existing customers, implement account-based scoring for targets, create dynamic nurture tracks that adjust based on score changes, integrate with sales enablement tools for AI-recommended talking points.



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Automate  
the reports.  
Focus on the  
human  
response.

# Track efficiency gains and measure success

Advanced workflows deliver both operational efficiency and strategic capabilities. Track both dimensions to prove comprehensive value.

Workflow	Metrics	Success indicators
Workflow 4 (content repurposing)	Content output volume (pieces per source asset), production time per piece, cross-channel engagement rates, content cost per engagement	time reduction, engagement rates match, or exceed original content
Workflow 5 (performance reporting)	Reporting time saved monthly, decisions made within 48 hours of insight, optimization actions taken, forecast accuracy	About 5-8 hours saved monthly, faster decision velocity, proactive optimizations versus reactive fixes
Workflow 6 (lead scoring)	Lead conversion rate by score tier, sales follow-up time on high-scoring leads, marketing qualified lead to sales qualified lead ratio, pipeline velocity	conversion lift on top-tier leads, sales focus shifts to 80% of time on top 20% of leads, faster deal cycles

**Monthly review process:** Compare output and quality to baseline, track strategic gains (experiments run, decisions made, opportunities captured), calculate ROI (time saved × hourly rate + performance lift), identify bottlenecks requiring intervention, document successful prompts for team library.

Remember that workflow improvements compound over time. Month one shows efficiency gains, months three-to-six surface strategic advantages as teams reallocate saved time to high-value activities.

# From quick wins to marketing transformation

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You've now implemented six AI workflows across productivity, content, social, email, analytics and demand generation. This foundation positions you to move to more advanced AI capabilities.

## **Your progression:**

- Months 1–2 (complete): Quick-Start Part 1 workflows (social listening, Copilot, email personalization)
- Months 3–4 (complete): Advanced workflows (content repurposing, reporting, lead scoring)
- Months 5–6 (next): Advance to real-world use cases for campaign budget optimization, predictive customer behavior and audience segmentation at scale
- Months 7–9 (future): Explore qualitative insights (customer feedback analysis, meeting intelligence, competitive monitoring)
- Months 10–12 (build): Develop proprietary AI workflows tailored to your organization, formalize AI champions network

As workflows multiply, strengthen governance by expanding approved tools, refine prompt privacy rules, document review standards, create decision audit trails.

Convert successful prompts to reusable templates, organize by function, enable team contributions, and ratings, establish version control.

# Recommended reading and references

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For further learning, these resources provide practical guidance on responsible AI adoption, strategy, and implementation.

## **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 Generative AI Readiness Survey](#)
- [Canadian Marketing Code of Ethics and Standards](#)

## **External resources:**

- Descript: [The slop-free guide to AI content repurposing](#)
- [Google Analytics Help](#)
- [Microsoft Power BI Copilot Tutorials](#)
- Hubspot: [Build contact lead scores with AI](#)

# The CMA

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This playbook 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.

For more information, visit [thecma.ca](https://thecma.ca).



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Solidify the  
foundation.  
Scale with  
confidence.