

AI PLAYBOOK 28

AI Smart Practices for Marketers

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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

The AI reality

Earlier this year, a federal judge in the United States issued a significant ruling ordering OpenAI to preserve all user conversations indefinitely, including those previously deleted by users.

Crucially, this meant conversations users thought were private and deleted were permanently retained and potentially discoverable in legal proceedings. The order overrode OpenAI's previous 30-day deletion policy and affected hundreds of millions of users worldwide, including marketing teams who may have shared sensitive business information.

While this ruling has ended and OpenAI is no longer obligated to retain personal and API conversations, the precedent highlights important realities about AI usage that require ongoing caution and due diligence. Key considerations for marketing leaders remain relevant:

- Every AI interaction could create a permanent record.
- Sensitive data exposure cannot be undone.
- Brand reputation depends on responsible AI use.
- Regulatory compliance is non-negotiable.

The CMA AI Committee has developed over 25 playbooks covering various aspects of AI implementation to help Canadian marketers harness AI responsibly.

How organizations can leverage AI effectively

Given that all AI interactions are potentially discoverable, organizations should embrace the following:

First, implement AI governance. Establish clear protocols distinguishing between AI-safe uses (brainstorming, public research) and "traditional-only" work (sensitive analysis, confidential planning). This tiered approach acknowledges that every AI conversation becomes part of your organization's permanent record.

Second, establish clear AI usage classifications. Create simple, memorable categories that define what information is appropriate for AI interactions versus what requires traditional methods. Develop guidelines that enable teams to confidently use AI for general research, content ideation, and public information synthesis while automatically protecting customer data, competitive intelligence, and proprietary strategies from permanent AI records.

Third, embed responsibility-first team practices. Train every team member that AI interactions carry permanent consequences for brand reputation and regulatory compliance. Build organizational discipline where responsible AI use becomes as natural as following other professional standards.

Fourth, align with established ethical frameworks. Ensure your organization has established and is following a comprehensive set of AI guidelines and principles. The [Canadian Marketing Code of Ethics and Standards](#) includes AI principles that provide essential guidance for responsible AI use.



Every output
represents
your brand.

Strategic AI adoption framework for marketing leaders

Marketing leaders must establish clear guidelines across three critical dimensions:

1. AI usage

- AI-safe categories: General research, public content ideation, brainstorming with non-proprietary information, SEO analysis, competitive research using public data.
- "Traditional-only" categories: Customer PII, internal performance metrics, competitive intelligence, proprietary strategies, confidential campaign data.
- Create a simple decision framework.
- Build team intuition through clear, memorable guidelines rather than case-by-case decisions.

2. Tool selection

- Consumer AI tools: Only for AI-safe categories and public information.
- Enterprise solutions: For any business-sensitive information requiring data controls.
- Simple rule: If it's confidential to your organization, use enterprise platforms with retention controls.
- Clear escalation path: When uncertain about tool selection, default to more secure option.

3. Team enablement

- Establish clear, memorable AI usage guidelines that teams can apply intuitively and ensure alignment to AI governance policies.
- Focus on decision frameworks rather than individual interaction scrutiny.
- Regular reinforcement through team meetings and updates.
- Create confidence through clarity: Teams should know immediately what's appropriate without overthinking each use.

Implementation principles for marketing teams

Responsible AI adoption requires balancing immediate action with systematic thinking. Here are the essential principles to guide your approach:

- **Immediate assessment:** Start with a review of your current AI exposure. This assessment creates the foundation for more responsible practices going forward.
- **Establish clear boundaries:** Create simple "AI-safe" categories (general research, public content ideas) and "traditional-only" boundaries (customer data, competitive intelligence, proprietary strategies). Give your team a simple test: would you be comfortable if a competitor saw the AI conversation?
- **Build team confidence:** Train your team for intuitive decision-making rather than complex approval processes. Establish clear escalation paths and maintain regular communication so responsible AI usage becomes as automatic as following other professional standards.
- **Maintain ongoing vigilance:** Stay informed about legal precedents and emerging AI capabilities. Regularly review guidelines based on team feedback and document your decisions to demonstrate thoughtful governance.

The goal is confident AI adoption through clear boundaries, not decision paralysis through complex processes. Guidelines should enable innovation while automatically protecting what matters most.

Recommended reading and references

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](#)

The CMA

This playbook was developed with guidance from the [CMA AI Committee](#) and is part of our 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.



Leverage AI power responsibly.