

AI PLAYBOOK 31

Applications for Agentic AI and GenAI

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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

AI that amplifies marketing

This playbook showcases six AI applications that free Canadian marketers from repetitive tasks to focus on strategic work that drives real business growth. While we focus on conceptual frameworks rather than detailed technical instructions, these applications provide actionable insights for implementation planning:

- AI customer service evolution
- Creative amplification
- Testing acceleration
- Enabling scale
- Data intelligence enhancement
- Brand monitoring and crisis prevention

The shift happening across Canadian marketing is profound. Instead of spending most of your time on routine tasks, responsible AI implementation enables you to dedicate that capacity to what you do best: strategic thinking, authentic relationship building, and creative innovation. Organizations implementing these approaches gain capacity while achieving measurable results in productivity improvements.

This isn't about replacing human expertise, it's about amplifying it. When AI handles data processing, content variation creation, and routine interactions, marketers become strategic orchestrators who leverage intelligent automation while focusing on the creative and relationship-building work that creates lasting competitive advantage.

Essential guardrails for responsible AI implementation

Before implementing AI applications, Canadian marketers must establish critical guardrails to ensure responsible, compliant, and effective deployment. These foundational considerations protect your organization while maximizing AI's strategic value.

Data privacy compliance

Align with Canadian privacy laws including PIPEDA and Quebec's Law 25. Ensure proper consent mechanisms and maintain data requirements.

Intellectual property considerations

Establish clear ownership protocols for AI-generated materials and monitor regulatory developments.

Algorithmic bias prevention

AI models can scale unintended biases present in training data, potentially creating unfair or exclusionary marketing practices. Implement mandatory human review processes and regular bias audits to ensure fairness and inclusivity across all customer segments.

Accuracy and hallucination controls

Never deploy AI-generated content without human validation, especially for customer-facing communications. Establish clear review protocols and escalation procedures for questionable AI outputs.

Customer service evolution

Canadian marketing and customer service teams face a capacity challenge: routine inquiries consume significant team capacity, leaving minimal time for the meaningful interactions and strategic customer experience innovation that build brand loyalty, create emotional connections and establish lasting competitive advantages.

AI agents can autonomously handle routine tasks including:

- Account status and balance inquiries
- Policy questions and coverage details
- Basic troubleshooting and technical support
- Appointment scheduling and rescheduling
- Order tracking and shipping updates
- Password resets and account access
- Billing questions and payment processing
- Efficient routing of escalations for human review when inquiries require expertise

These systems intelligently escalate complex issues that benefit from human expertise. Put into practice, a financial institution can automate standard inquiries freeing relationship managers to spend significantly more time on strategic financial planning and advisory services with customers.

The result is faster resolution of routine issues while complex matters receive dedicated human attention that builds stronger customer relationships.

Creative amplification

Canadian creative teams face mounting content demands across multiple channels, creating a bottleneck where professionals spend most of their time on initial concept generation rather than innovative campaign development.

GenAI alters creative workflows by rapidly generating:

- Initial creative concepts and variations
- Headline and copy alternatives
- Cross-channel content adaptations
- Social media post variations
- Email subject line options

The result is that creative roles can become more expansive and fulfilling as they gain capacity for:

- Mentoring junior talent and building team capabilities
- Developing new creative skills and cross-disciplinary expertise
- Building deeper client relationships and business consultation
- Exploring innovative formats, technologies, and creative partnerships
- Conducting cultural research and trend analysis
- Contributing thought leadership to advance the creative profession
- Experimenting with breakthrough ideas that push creative boundaries

Creatives evolve into innovation leaders who shape brand experiences and pioneer approaches competitors cannot easily replicate.



AI amplifies
your impact
and
productivity.

Testing acceleration

Marketing analytics teams face a resource drain: manual A/B test setup, monitoring, and analysis consume substantial analytical capacity that could be dedicated to strategic insight development and competitive intelligence.

AI testing automation changes workflows by handling:

- Test creation and variation development
- Real-time monitoring and statistical analysis
- Winner detection and implementation
- Multi-channel test coordination
- Performance analysis, reporting and learning capture

This increases testing velocity while freeing analytical capacity for strategic hypothesis development.

The result is that analysts evolve from test operators to strategic optimization consultants with capacity for:

- Developing sophisticated testing hypotheses
- Interpreting results within broader market context
- Conducting competitive intelligence analysis
- Identifying high-impact optimization opportunities
- Strategic campaign planning and forecasting

AI enabling scale

AI enables testing and personalization at scales impossible with human resources, transforming how marketers understand and engage individual customers.

1:1 User-Level Intelligence

AI can be used to automatically scan and tag marketing assets to advance analysis across every user interaction. Think Google UTM tagging but for users on every piece or block of content. This granular intelligence can accelerate profile development and enable testing of micro-segments, modular or atomic creative components, and personalized experiences that would require thousands of analysts to manage manually.

Personalization testing on a large scale

AI can simultaneously test thousands of dynamic content variations across web, email, and app experiences. While creating 100,000 website landing page permutations is impossible with human resources, AI generates, deploys, and tests these variations automatically, optimizing personalization in real-time based on user behavior.

Impact

Marketers gain unprecedented insight into customer preferences while testing personalization approaches that would be completely unfeasible manually. This enables truly individualized experiences at scale while freeing marketing teams to focus on strategic customer experience design and competitive differentiation.

The result: marketing teams can deliver personalized experiences that feel individually crafted while operating with efficiency and insight that competitors cannot match without similar AI capabilities.

Data intelligence enhancement

Canadian marketers face a data processing challenge: creating meaningful personalization requires vast customer data analysis, but manual cleansing and enhancement prevents strategic focus on customer experience design. Comprehensive analysis would require thousands of analysts, making sophisticated personalization impossible and out of reach for most organizations.

AI streamlines the approach by automatically:

- Processing and cleansing customer information across touchpoints
- Enriching profiles using behavioural signals and interaction patterns
- Creating dynamic segmentation based on evolving characteristics
- Identifying real-time personalization opportunities
- Tracking individual user engagement patterns and preferences

This enables tailored approaches, and a greater understanding of not just what customers engage with, but how they engage and what experiences drive desired outcomes.

The result is that marketing teams gain capacity for:

- Developing comprehensive customer experience frameworks
- Ensuring privacy compliance and ethical governance using the guardrails outlined earlier
- Building customer advisory and consultation services
- Creating innovative engagement strategies and touchpoint design
- Conducting advanced market research and competitive intelligence
- Designing personalization that strengthens customer relationships

Brand monitoring and crisis prevention

Brand reputation can shift instantaneously, yet most marketing teams only discover issues after they've escalated. Manual monitoring across social media, review sites, news outlets, apps and forums is reactive rather than proactive, leaving brands vulnerable to reputation damage that could have been prevented or minimized with early intervention.

AI streamlines brand monitoring by automatically:

- Tracking brand mentions across social media, news, and review platforms
- Analyzing sentiment trends and identifying reputation shifts in real-time
- Detecting potential crisis triggers before they escalate
- Monitoring competitor reputation changes and market conversations
- Flagging unusual spikes in negative sentiment or conversation volume
- Generating automated alerts for immediate response requirements

This enables proactive brand protection rather than reactive damage control.

The result is that brand managers gain capacity for:

- Strategic brand positioning and narrative development
- Building authentic community relationships and advocacy programs
- Developing crisis response frameworks and communication strategies
- Creating proactive content that strengthens brand reputation
- Conducting strategic competitive analysis and differentiation planning
- Building media relationships and thought leadership initiatives
- Designing customer experience improvements based on feedback patterns

Integrated AI operations in practice

AI applications compound their value when working in coordination, creating customer experiences and marketing efficiency that using isolated tools cannot match. It's important to note that governance and compliance considerations must be layered into the approaches.

Customer journey: A prospect downloads a whitepaper and AI enhances their profile with behavioural signals. When they submit a service inquiry, the AI agent has full context for personalized responses and smart escalation. As a customer, AI testing optimizes their email sequences based on engagement patterns while brand monitoring tracks social sentiment for opportunities or proactive concern resolution.

Cross-channel optimization loop: Customer service interactions inform data intelligence about common pain points. This insight triggers creative AI to develop content addressing these issues. Testing automation validates which messages resonate most effectively. Brand monitoring ensures consistent positive sentiment across channels. All insights feed back to enhance customer profiles for even more tailored and proactive service.

AI campaign development in action

Traditional campaign development typically involves weeks of back-and-forth between strategists, creatives, and analysts. AI integration converts this process into a coordinated system where multiple AI applications work together seamlessly, accelerating timelines while improving outcomes.

Step 1: Strategic foundation

Marketing strategist defines campaign objectives and target audience insights, establishing the strategic framework that guides all AI activities.

Step 2: Creative generation

GenAI rapidly produces 50+ creative concepts, headlines, and messaging variations based on the strategic brief—work that would typically take weeks.

Step 3: Testing & monitoring

AI automatically launches tests across email, social, and web channels while simultaneously monitoring brand sentiment in real-time across all touchpoints.

Step 4: Learning & optimization

AI captures how individual users engage with each variation, automatically feeding insights back to refine creative approaches and inform strategic planning for future campaigns.

The result is what used to take months now happens in weeks, with human strategists and creative teams focusing on high-level strategic and creative direction and fine-tuning outputs while AI handles execution and optimization.

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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 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.

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Shift from
task-focused
to strategy-
focused.

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