

AI PLAYBOOK 26

Ready, Set, AI: 5 Real World Use Cases



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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

Introduction

Marketing teams are under pressure to adopt AI, but many struggle to separate real, usable applications from industry and vendor noise. This playbook helps marketers move beyond buzzwords to focus on practical, low-risk ways to apply AI to everyday marketing work.

Inside, you'll find five proven use cases with clear timelines, tool options, setup steps and performance frameworks to measure ROI and improvement. Each use case outlines step-by-step guidance you can implement within 90 days without large budgets or technical teams.

Before adopting any AI tool, success starts with an honest assessment of your current marketing operations and data readiness. Use the short diagnostic on the next page to identify your best starting point and select the use case that will deliver the quickest, most measurable impact.

10-Minute maturity assessment

Score each area from 1-5 (score 1=major problem, score 5=working well).

Manual tasks: How many hours weekly do you spend on campaign management, content creation, and data analysis?

- 1: 15+ hours mostly manual, repetitive work; limited automation tools.
- 2: 10–15 hours some task batching or templates, but still largely manual.
- 3: 5–10 hours using a few automations or scheduling tools for recurring tasks.
- 4: 2–5 hours workflows largely automated or delegated; manual review only.
- 5: <2 hours fully automated or AI-assisted execution; focus on strategic oversight.

Data gaps: Do you have clean CRM data, conversion tracking, and customer behaviour insights?

- 1: No reliable or unified data; tracking inconsistent.
- 2: Fragmented data, some channels tracked but not connected; frequent data quality issues.
- 3: Basic analytics in place, can view top-line metrics per channel.
- 4: Integrated data pipeline, cross-channel view, basic dashboards, some predictive analytics.
- 5: Comprehensive, high-quality data, unified CRM/CDP, real-time insights, actionable dashboards.

Personalization: Can you segment customers and deliver targeted messaging?

- 1: One-size-fits-all messaging across all channels. |
- 2: Static lists or manual segmentation (e.g., by demographics only).
- 3: Rule-based segments (e.g., engagement level, purchase frequency).
- 4: Dynamic segmentation based on behaviour or lifecycle stage; semi-automated targeting.
- 5: Fully dynamic, AI-driven personalization in real time across channels.

10-Minute maturity assessment

Score each area from 1-5 (score 1=major problem, score 5=working well).



Budget efficiency: Are you optimizing ad spend daily and tracking ROAS by channel?

- 1: Manual monthly reviews; no optimization system.
- 2: Basic manual checks every 1–2 weeks; limited channel visibility.
- 3: Weekly optimization with platform insights.
- 4: Near-daily adjustments using rules or scripts; strong ROAS visibility.
- 5: Fully automated, AI-driven budget optimization and attribution tracking.

Content bottlenecks: How quickly can you produce blog posts, social content, and ad copy?

- 1: 8+ hours per piece, bottlenecks and multiple approvals.
- 2: 6–8 hours, partial template use but still slow revisions.
- 3: 4–6 hours, streamlined process with internal collaboration tools.
- 4: 2–4 hours, leveraging AI or automated workflows for drafts.
- 5: <2 hours, AI-assisted generation, editing, and publishing flow.

AI readiness level and next steps	
Early stage 5-15 points	Establish the 90-day roadmap, then start with use case 4 (content generation) as the quickest win.
Developing stage 16-20 points	Establish the 90-day roadmap, then begin with use case 1 (campaign optimization) for biggest impact.
Advanced stage 21-25 points	Establish the 90-day roadmap, then choose any use case based on business priority.



AI makes your skills scalable.

From insight to action: a pilot program roadmap

AI projects succeed when there's a plan. This suggested roadmap helps you implement any of the five use cases in this playbook with structure, measurable outcomes, and a path to scale.

Phase 1: Foundation & setup

- Complete the 10-minute marketing AI assessment.
- Choose your starting use case (based on assessment score).
- Export CRM, analytics, and campaign data.
- Set up or verify conversion tracking.
- Document current processes and weekly manual hours.
- Establish baseline KPIs (conversion rate, ROAS, content time, etc.).
- Assign an AI pilot lead for oversight and progress tracking.

Output: Clean data, baseline metrics, tool access, and readiness checklist.

Phase 2: Pilot launch

- Connect chosen AI tool to your existing platforms (Ads, CRM, CMS).
- Create first automation workflows or AI-assisted templates.
- Begin AI-assisted tasks; monitor results daily for the first week, then weekly.
- Track time saved, performance lift, and qualitative feedback.
- Document key lessons and early wins for internal sharing.

Output: Pilot live, early efficiency gains measured.

Phase 3: Scale & optimize

- Compare current results to baseline KPIs.
- Refine AI settings, segmentation, or prompts based on insights.
- Train additional team members and standardize workflows.
- Calculate ROI and prepare report of pilot outcomes.
- Select next AI use case (e.g., Predictive Analytics or Audience Segmentation).

Output: Proven ROI, trained team, roadmap for next use case.

Use Case 1: AI-driven campaign budget optimization

Manual campaign management often consumes valuable time and still delivers inconsistent results. AI tools can automatically reallocate ad spend across channels and creatives in real time based on performance data, ensuring your budget flows toward the highest-converting opportunities with minimal manual oversight. This frees up time for creative testing and audience expansion.

Readiness checklist:

- Active Google Ads and Meta campaigns with conversion tracking.
- Consistent monthly ad spend (e.g.: \$2K+).
- At least 3 active campaigns per channel.

Implementation steps:

1. Install and connect your ad accounts to an AI optimization tool (e.g.: Madgicx, Revealbot, Albert.ai).
2. Set baseline KPIs (CPA, ROAS, conversion rates) for comparison.
3. Allow the AI system to optimize automatically. Monitor results daily in week one, then weekly.
4. Avoid manual changes or campaign pauses during the first 30 days while the model learns patterns.

Scaling next steps:

- Add Google Performance Max or cross-channel campaigns.
- Enable dynamic creative testing within the tool.
- Integrate CRM or email data for better audience insights.

Expected impact: 10–30% improvement in ROAS within the first optimization cycle; 5–10 hours/week saved on manual management.

Use Case 2: Personalized customer touchpoints at scale

Generic campaigns often fail to resonate across diverse audiences. By using AI-powered personalization, marketers can automatically tailor emails, web content, and ads to each customer segment without requiring large creative teams. Dynamic content blocks and automated segmentation create relevant, engaging experiences that drive higher conversion and retention.

Readiness checklist:

- Active email list or CRM with core customer data (e.g., purchase history, location, or on-site behaviour).
- Existing marketing automation tool with AI or personalization features (e.g., Mailchimp, HubSpot, Klaviyo, or Iterable).
- At least one channel with measurable engagement (email or web analytics).

Implementation steps (4 Weeks):

1. Segment your audience by recent behaviour such as recent purchasers, frequent browsers, and inactive subscribers.
2. Create 3–5 modular email templates or web content blocks with dynamic content that adapt messaging, visuals, or offers to each segment.
3. A/B test personalization elements such as subject lines, product recommendations, or CTAs.
4. Monitor key metrics weekly (open rate, CTR, conversion rate) and refine segment logic based on performance.

Use Case 2: Personalized customer touchpoints at scale

Scaling next steps:

- Create dynamic homepage content based on visitor source and behaviour.
- Add AI-driven product recommendations to e-commerce experiences.
- Deploy dynamic ad creative aligned with audience segments.
- Introduce personalized SMS/push campaigns for high-value or re-engagement audiences.

Expected impact:

- 10–20% uplift in click-through or conversion rates within the first month.
- Reduced creative workload through reusable dynamic templates.
- Improved retention via timely, context-aware messaging across channels.

Use Case 3: Predict customer behaviour and market demand

Most marketing teams make decisions based on historical performance rather than forward-looking insights. Predictive analytics enables you to anticipate customer actions such as likelihood to convert, churn, or repurchase — and forecast demand more accurately. With even modest volumes of quality data, AI can surface patterns that drive smarter targeting, better timing, and improved resource allocation.

Readiness checklist:

- At least 12 months of clean CRM data with tracked interactions, purchases, and outcomes.
- Consistent use of analytics or CRM tools (e.g., Pipedrive, HubSpot, Salesforce, or GA4).
- Defined conversion goals or customer outcomes (e.g., purchase, signup, renewal).

Actions during setup:

- Use Google Analytics 4 predictive metrics (purchase probability, churn probability) to identify customers likely to buy again.
- Export CRM data and run exploratory analysis to confirm which attributes most correlate with conversions.
- Begin manual testing of lead prioritization to validate early predictive insights before full automation.

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Use Case 3: Predict customer behaviour and market demand

Implementation Steps (~14 Weeks):

1. Clean and organize your historical data to ensure consistent fields and accurate timestamps.
2. Identify high-value traits (e.g., frequency, order value, engagement) and use these to manually score a sample of customers.
3. Train or enable predictive models using CRM or analytics tools (e.g., Pipedrive's AI Sales Assistant or HubSpot's Predictive Lead Scoring).
4. Apply lead scores to prioritize sales or nurture actions.

Scaling Next:

- Add churn prediction models to flag at-risk customers and trigger re-engagement campaigns.
- Implement demand forecasting to guide inventory and campaign planning.
- Extend analytics to predict customer lifetime value (CLV) and tailor offers accordingly.

Expected impact:

- 15–25% increase in lead conversion efficiency once predictive scoring stabilizes.
- Improved retention through proactive churn interventions.
- Reduced campaign waste by focusing effort and spend on high-propensity segments.

Use Case 4: Content generation and SEO acceleration

Marketing teams often struggle to maintain both content volume and quality while staying competitive in search rankings. AI-assisted content creation streamlines research, drafting, and optimization, allowing marketers to produce more high-performing material in less time. The goal is not to replace creativity but to accelerate output and improve consistency across formats.

Readiness Checklist:

- Access to AI writing or SEO tools (e.g., ChatGPT Plus, Jasper, Ahrefs, or Google Keyword Planner).
- Established brand tone and content guidelines.
- At least one active content channel (e.g., blog, social media, or email).

Implementation Steps (2–4 Weeks)

Week 1:

1. Use AI for keyword and topic research to identify high-value content opportunities.
2. Generate content briefs and first drafts for blog posts.
3. Edit and refine drafts for tone, factual accuracy, and local (e.g., Canadian) context.

Weeks 2–4:

4. Develop reusable AI-assisted templates for social media posts, email subject lines, and ad copy.
5. Establish a review workflow to balance AI output with human oversight and approvals.

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Use Case 4: Content generation and SEO acceleration

Implementation Tips:

- Train AI on your brand voice by providing examples of your best-performing content.
- Always review AI outputs for factual accuracy, tone consistency, and regional context.
- Build content templates (for blog structure, captions, CTAs) to ensure repeatable quality.

Scaling Next:

- Add multilingual content generation for bilingual Canadian audiences (English/French).
- Implement AI-assisted email newsletter creation and A/B testing.
- Expand to product description generation for e-commerce catalogues.
- Introduce AI-driven content calendar planning and trend analysis to anticipate topics.

Expected Impact:

- 30–50% reduction in content creation time per asset.
- Improved SEO performance through keyword-informed drafting.
- Consistent cross-channel messaging with less manual copywriting effort.

Use Case 5: Discover customer patterns for precise targeting

Traditional segmentation based on demographics or geography leaves significant opportunity untapped. AI-driven audience segmentation and propensity modeling uncover behavioural and value-based patterns hidden in your data enabling precise targeting, improved ROI, and more relevant customer experiences. By identifying micro-segments (e.g., high-value repeat buyers or at-risk churners), marketers can optimize messaging and spend with greater accuracy.

Readiness checklist:

- At least 500 customers with 6+ months of purchase and engagement history.
- Access to CRM or e-commerce platform data (e.g., HubSpot, Klaviyo, or Shopify).
- Ability to run or export performance and behavioural metrics (order value, purchase frequency, engagement).

Implementation Steps (10 Weeks):

1. Export customer data including purchase frequency, order value, and engagement activity.
2. Clean and normalize the dataset to ensure consistent formatting and remove duplicates.
3. Use AI segmentation tools to identify 4–6 distinct customer clusters (e.g., loyalists, deal-seekers, infrequent buyers).
4. Develop targeted campaigns for each segment across email, paid, or social channels.
5. Measure performance differences between segments — track metrics like conversion rate, average order value, and ROAS.
6. Refine segments or predictive models based on campaign outcomes.

Use Case 5: Discover customer patterns for precise targeting

Quick implementation options:

- Create Facebook or Instagram Lookalike Audiences from your best customers email lists.
- Use CRM-integrated predictive analytics (e.g., HubSpot, Baremetrics) to forecast customer lifetime value (CLV) or churn risk.

Scaling next steps:

- Add behavioural trigger campaigns (abandoned cart, browse abandonment, repeat purchase reminders).
- Implement real-time website personalization based on active customer segments.
- Build predictive segments (e.g., likely to churn, ready to upgrade, first-time buyer).
- Connect segments to automated nurturing workflows in your CRM or CDP.
- Create cross-platform lookalike audiences (e.g., Meta or Google Ads) for each high-value segment to expand reach efficiently.

Expected impact:

- 10–25% improvement in campaign performance through more precise targeting.
- Reduced wasted ad spend by focusing on high-propensity segments.
- Deeper customer insights to inform personalization, retention, and product strategy.

Measuring success through continuous optimization

AI success isn't 'set it and forget it'. The real gains come from tracking performance, learning from data, and continuously refining your approach. Use these metrics and monthly reviews to measure improvement across three dimensions: financial results, operational efficiency, and customer impact.

Financial Performance	Use: Google Analytics, CRM and ad platform dashboards Campaign ROI: Compare cost per conversion before/after AI Customer acquisition cost (CAC): Monthly calculation across channels Lifetime value (LTV): Monitor changes in average customer value or retention Revenue attribution: Measure AI-generated content/campaign sales
Operational Efficiency	Use: Time-tracking tools like Toggl and Clockify Time savings: Log and compare weekly manual task hours pre/post AI Content production: Count weekly content pieces created Decision speed: Track time from data to action Error reduction: Monitor campaign mistakes and corrections
Customer Impact	Use: Email, social media analytics and customer feedback tools Engagement: Email open rates, CTR, social engagement Personalization: Compare personalized vs. generic campaign performance Satisfaction: Collect quarterly feedback or NPS survey data Retention: Track repeat purchases and monthly churn rates
Monthly Review Process	Week 1 of each month: <ul style="list-style-type: none">• Export all performance data from analytics, CRM and time-tracking• Compare to baseline and previous month• Identify top 3 improvements and challenges• Adjust AI settings, prompts or campaign rules

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](#)

External References

- Office of the Privacy Commissioner of Canada: [Privacy and artificial intelligence \(AI\)](#)
- Think with Google: [Success Stories](#)
- Adobe: [The future of content creation and production with generative AI](#)
- McKinsey: [The state of AI – How organizations are rewiring to capture value](#)
- OpenAI Learning Center: [ChatGPT for Marketing](#)
- Neil Patel: [9 AI Tools for Successful Marketing Funnels](#)
- World Economic Forum: [Responsible AI Playbook 2025](#)
- Google Ads: [Smart Bidding and AI Campaign Optimization](#)
- Brands At Play: [The Ultimate Guide to AI Marketing Automation in 2025](#)
- Impact: [The marketer's guide to AI-powered creator campaigns: A technology-agnostic framework](#)

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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Automate
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create
authentically.

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