

AI PLAYBOOK 42

Refining AI Outputs: A Practical Playbook for Marketers

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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

Build confidence in your AI outputs

Your team has now implemented nine workflows across content, operations, and automation from Parts [1](#), [2](#) and [3](#). The next question is: how do you know the outputs are ready to move forward?

AI can generate strong first drafts and save significant time, but those outputs are rarely ready for publication as-is. Consistent refinement is what ensures quality, protects your brand, and ultimately drives results. Human judgment remains essential.

This playbook focuses on how to refine AI outputs effectively. It walks through four practical examples, email personalization, social content, performance reporting, and customer service chatbots, alongside common refinement patterns, a pre-approval quality checklist, and guidance on when to escalate to legal, compliance, or subject matter experts.

Across these use cases, three types of refinement consistently matter most. First, brand alignment, ensuring tone and voice reflect your organization rather than generic output. Second, strategic enhancement, adding context, nuance, and positioning that AI cannot infer on its own. Third, compliance verification, confirming that regulatory requirements are properly addressed.

Understanding how and when to apply these refinements will help you make confident approval decisions and scale the use of AI across your marketing operations with greater control and consistency.

Email personalization: before/during/after

Before (typical starting point): Marketer manually segments email list based on last purchase date, writes three versions of promotional email for recent buyers, lapsed customers and never-purchased subscribers.

AI-assisted output (workflow 3 from Part 1): AI produces email with subject line "Complete Your Purchase Today," body copy highlighting cart items, 15 per cent discount code and call-to-action button.

Refined final output: Marketer reviews AI generated draft and makes targeted refinements:

- Updates subject line to reflect brand voice: "You left something behind (and we saved it for you)."
- Adjusts urgency language from "Act now before it's gone!" to "Available while supplies last."
- Adds compliance and transparency language: "You're receiving this because you started checkout on [date]. Manage your preferences or unsubscribe here. Discount applies to select items only."
- Confirms discount code functionality and clarifies expiration.
- Removes out-of-stock items from recommendations.

The final version retains AI-driven structure and personalization while strengthening brand alignment, compliance, and customer experience.

Social content: before/during/after

Before (typical starting point): Marketer drafts social post announcing new product feature based on customer feedback, writes three variations to test which resonates, creates accompanying image request for design team, schedules post manually across three platforms with slight variations for each channel's audience and format requirements.

AI-assisted output (workflow 1 extension): AI generates: "Excited to announce a game-changing new feature! Our dashboard customization tool lets you personalize your workspace like never before. Built based on customer feedback, it demonstrates our commitment to user experience. Start your free trial today and see the difference!"

Refined final output: Marketer identifies key areas requiring refinement:

- Replaces generic phrasing with conversational, brand-aligned language: "You asked, we built it."
- Adds specific context AI cannot infer: "After 247 customer requests over six months, custom dashboards are here. Drag, drop and arrange your workspace exactly how you need it."
- Incorporates customer proof points: "Early access users report saving 20 minutes daily by prioritizing their most-used widgets."
- Adjusts call-to-action to emphasize value: "Try it free for 14 days, no credit card needed."

The final version keeps AI efficiency while adding specificity, credibility, and audience relevance.

Performance reporting: before/during/after

Before (typical starting point): Marketer exports campaign data from three platforms, manually creates spreadsheet consolidating metrics, calculates percentage changes from previous month, generates basic charts in Excel, writes summary paragraph for stakeholder email.

AI-assisted output (workflow 5 from Part 2): AI produces report with data tables showing email had highest conversion rate, social generated most traffic, paid search delivered lowest cost per acquisition. Includes charts and summary with a recommendation of budget reallocation for optimization.

Refined final output: Marketer reviews AI analysis and applies business context and judgment:

- Explains drivers behind social conversion decline (e.g., audience shift, creative fatigue).
- Adds context on email performance (e.g., seasonality, segmentation changes).
- Validates or challenges AI recommendations based on broader priorities.
- Incorporates external or competitive insights where relevant.

The final output shifts from descriptive reporting to actionable decision support.

Customer service chatbot: before/during/after

Before (typical starting point): Customer service team responds to common questions about order status, return policies and product specifications throughout the day.

AI-assisted output (workflow 7 from Part 3): Customer asks: "What's your return policy for opened products?" AI chatbot responds: "Our return policy allows returns within 30 days of purchase. Opened products are accepted if they are in resalable condition. Refunds are processed within 5 to 7 business days. Would you like to start a return?" Response is generated instantly from the knowledge base and remains consistent across inquiries.

Refined final output: Team reviews chatbot conversation logs on a regular cadence and identifies refinement opportunities. The original response is accurate but lacks empathy, context, and necessary qualifiers.

Updated response: "I can help with that! Our 30-day return policy covers opened products as long as they're in resalable condition. If you're not satisfied with your purchase, we'll make it right. Can you tell me more about the issue you're experiencing? Sometimes we can resolve it without a return, but if not, I'll walk you through the process. For health and safety reasons, some items (listed here) can't be returned once opened."

The updated response maintains efficiency while improving empathy, resolution focus, and compliance in a single, cohesive interaction.

Quality checklist and validation

Apply the following checks before approving any AI-generated output:

1. Brand voice consistency

- Watch for: Generic or templated language that weakens brand differentiation.
- Action: Replace with language that reflects your brand voice and tone.

2. Factual accuracy

- Watch for: Incorrect statistics, outdated references or confident-sounding false claims.
- Action: Validate all claims against source data and current information.

3. Compliance requirements

- Watch for: Missing privacy disclaimers, unsubscribe language, regulatory qualifications or risk statements.
- Action: Confirm required legal and regulatory language is present, particularly for email, advertising, and data use.

4. Strategic alignment

- Watch for: Missing context related to competitive positioning, customer feedback, market timing or organizational priorities.
- Action: Add internal context and priorities that AI cannot infer.

5. Audience appropriateness

- Watch for: Transactional tone, pushy messaging or inappropriate emotional resonance.
- Action: Adjust tone, level of empathy, and messaging to match audience and relationship stage.

6. Escalation triggers

- Watch for: Content requiring specialized review (legal, technical, crisis-related).
- Action: Escalate to legal for regulated content, leadership for sensitive issues, and subject matter experts for technical validation.

Recommended reading and references

For further learning, these resources provide practical guidance on responsible AI adoption, quality standards and continued skill development.

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](#)

The CMA

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.

The CMA is the voice of marketing in Canada, and our purpose is to champion marketing'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 Canadian Marketing Code of Ethics and Standards. We represent virtually all of Canada's major business sectors and all marketing disciplines, channels and technologies. We advocate with government stakeholders, while also providing Canadian consumers with information to help them better understand their rights and obligations. For more information, visit thecma.ca.



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