

AI PLAYBOOK 34

Unlock Hidden AI In Your Marketing Stack

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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.

Your untapped AI inventory

While teams scramble for expensive standalone AI solutions, the most powerful automation, content generation, and predictive tools exist within your current platforms.

Most teams barely scratch the surface of what their existing platforms can do. This represents a massive untapped opportunity to solve productivity gaps, streamline workflows, and drive measurable business growth without additional software purchases, shifting routine operations into intelligent, automated systems that deliver immediate ROI.



Your marketing stack likely already contains powerful AI features most teams have not activated, which you may be able to access now, or through a simple license upgrade (not a new platform). Salesforce Einstein includes Content Selection for personalized experiences and Send Time Optimization. HubSpot AI offers prospecting tools, content generation from brief prompts, and customer service automation. Microsoft Copilot integrates across Office 365 and Teams for content creation, data analysis, and workflow automation. Google Workspace AI provides intelligent document creation, analytics in Google Ads, and smart campaign optimization. Hootsuite's OwlyWriter AI turns blog posts into platform-specific social media content.

The productivity multiplier comes from connecting these platform AIs together, creating seamless workflows that automatically coordinate customer experiences across your entire marketing ecosystem.

Immediate productivity solutions

Four quick-win strategies that deliver immediate productivity gains through built-in AI activation:

1. **Content creation** bottlenecks dissolve when you enable HubSpot's video-to-content tools, configure Salesforce Einstein Content Selection, leverage Microsoft Copilot for document creation, and activate Hootsuite's blog-to-social automation.
2. **Lead management** inefficiencies disappear through Einstein Lead Scoring, HubSpot's predictive lead scoring, Google Ads AI for automated audience targeting, and automated lead routing.
3. **Campaign optimization** gaps close using Einstein's Journey Builder Path Optimizer for A/B testing customer paths, HubSpot's Smart Content to change website elements based on visitor characteristics, Google's Performance Max campaigns for automated optimization, and AI-driven budget allocation.
4. **Reporting** time drains end with Einstein Analytics dashboards that update with real-time performance data, HubSpot's AI-powered insights, Microsoft Power BI's AI-driven analytics, Google Analytics Intelligence, and Hootsuite's automated performance summaries.



Maximize existing tools to supercharge productivity.

AI-powered marketing tools

Platform-specific AI support tools represent the biggest breakthrough in marketing automation. Salesforce's Agentforce Assistant (originally branded Einstein Copilot) enables conversational AI support across key Salesforce Clouds, anticipating user needs and recommending optimal next actions. HubSpot AI moves beyond simple automation to intelligent decision-making, with customer service capabilities that provide personalized answers by learning from your knowledge base. Microsoft Copilot integrates seamlessly across Office 365, Teams, and Power Platform, enabling AI-assisted content creation, data analysis, and workflow automation.

Native AI analytics and predictive insights offer sophisticated forecasting capabilities. Einstein Analytics provides customer lifetime value prediction, churn risk scoring, and next-best-action recommendations. Meanwhile, HubSpot delivers predictive lead scoring and automated trend identification. Google Analytics Intelligence and Google Ads AI provide automated insights, anomaly detection, and performance optimization recommendations.

In-platform generative content tools connect directly to your existing customer data, enabling personalization that standalone AI tools cannot match. Salesforce Marketing Cloud on Core (the next generation of Salesforce Marketing Automation platform) generates dynamic email content blocks, HubSpot creates entire marketing campaigns, while Microsoft Copilot helps create presentations, documents, and analysis from simple prompts.

Advanced hidden capabilities

Predictive analytics capabilities within existing platforms enable sophisticated forecasting that guides strategic marketing decisions. Companies leveraging AI for marketing see higher revenue growth through seasonal demand forecasting, customer acquisition cost optimization, and campaign performance projections before launch. Personalization engines create entirely different experiences based on AI-driven customer insights, going beyond basic demographic targeting to dynamic website experiences, adaptive email content that changes based on recipient behaviour, and personalized product recommendations.

Digital asset management platforms like Bynder offer AI assistants that automatically tag faces in images, classify content based on visual elements and context, and organize thousands of assets without manual intervention. These AI systems can identify brand logos, detect image sentiment, categorize video content by topic, and even suggest optimal crops for different social media platforms, saving hours of manual cataloguing work while improving content discoverability across large marketing teams.

AI-powered marketing automation platforms can automate what would typically be manual marketing tasks through intelligent lead nurturing sequences that adapt based on prospect behaviour, cross-channel journey orchestration that coordinates touchpoints across email and social media, and real-time campaign optimization.

Cross-channel orchestration represents the most powerful hidden capability, automatically determining optimal communication channels, contact frequency, content types, and purchase readiness timing across the entire marketing ecosystem.

Implementation prep and readiness

Before activating any AI features, establish your foundation. Specifically:

- Review your standing licenses and existing access to AI features and products, adjusting subscriptions as needed to unlock full capabilities within each platform.
- Review your data policies to ensure any activation and integrations will meet your organization's security and governance requirements, particularly around customer data handling and privacy compliance.
- Ensure your tools are configured so your proprietary data isn't training the vendors' public models most enterprise platforms offer private instance options that require explicit configuration.
- Set up a clean testing framework with a clear learning agenda and fallback scenarios. Define what experiences you want to unlock, how you'll measure success, and establish revert plans to ensure no customer experiences "break" during experimentation.

Implementation roadmap

Week 1-2 priorities

Focus on immediate platform audits and feature activation. These simple "in-platform" AI tools are ideal starting points because they require no additional data ingestion or cleaning, they leverage data already within each platform, making them quicker to activate. Log into each platform documenting currently activated AI capabilities, prioritize features that can be enabled immediately with minimal configuration, turn on fundamental automations like Einstein Send Time Optimization, HubSpot lead scoring, Microsoft Copilot integrations, and Google Ads Smart Bidding, and ensure AI tools have access to clean, integrated data.

Month 1 implementation

Center efforts on quick wins and measurement setup. Moving beyond single-platform data, this phase requires cross-platform integration, ideally leveraging a CDP as your single source of truth for customer, product, and marketing data sync and activation. Activate content generation tools across all platforms and integrate them with existing content workflows, configure predictive scoring models for leads and customers based on your historical data, enable automated reporting with AI-powered analytics dashboards from Einstein, HubSpot, Power BI, and Google Analytics, and launch AI-driven optimization testing across email campaigns, website experiences, and advertising channels.

Months 2-6 advanced rollout

Deploy intelligent workflows for multi-channel customer journeys that respond to behavior across touchpoints, activate personalization engines across all customer-facing experiences, integrate cross-platform AI capabilities for unified customer orchestration using Microsoft Power Platform and Google Workspace integrations, and optimize performance based on data insights and measurable business outcomes.

Measuring your AI-enabled impact

Build measurement frameworks and KPIs into your AI pilots. Not only will it be useful for MVP use-case optimization, but it will help express the value of your pilot programming to internal stakeholders and help drive wider adoption. Consider effectiveness metrics (e.g., conversion improvements through AI-powered A/B tests), efficiency metrics (e.g., time to market), and user sentiment tracking (e.g., ease of use, acceptance of AI tools). Sample metrics include:

- **Productivity and efficiency:** Monitor content production velocity by measuring pieces created weekly and time from concept to publication, campaign launch speed from initial brief to live deployment, lead processing efficiency per marketing team member, and report generation time savings through automated analytics and insights. A 2024 study from IDC, commissioned by Microsoft, found that for every dollar invested in GenAI, companies saw an average return of \$3.70.
- **Revenue impact:** Connect AI activation to business results through conversion rate improvements across customer journey stages, customer acquisition cost reduction via better targeting and personalization, customer lifetime value growth through improved retention strategies, and revenue attribution connecting AI-driven touchpoints to closed business opportunities.

Companies using AI in marketing report up to 22% higher ROI compared to traditional methods, with businesses implementing AI across three or more core marketing functions experiencing significant ROI improvements.

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](#)
- [Canadian Marketing Code of Ethics and Standards](#)

External references

- Microsoft: [AI business impact – Microsoft AI use cases](#)
- FastSlowMotion: [The future of Hubspot AI](#)
- Salesforce: [New Research Reveals SMBs With AI Adoption See Stronger Revenue Growth](#)
- SQ Magazine: [AI in Marketing Statistics 2025 – ROI, Tools and Trends](#)
- All About AI: [AI Marketing Statistics for 2025 – Growth, ROI, Trends and Real-World Impact](#)

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.

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.

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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.

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Unlock the AI
potential
already at
your
fingertips.

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