

# Ten Best Practices

## Operationalizing AI With Your Marketing Team



### 1 Dedicate Weekly Activities

Set aside specific time (e.g., Friday mornings, 9-10 AM) for team members to demonstrate their experimentation with AI tools. This helps build competency and discover new use cases.

### 2 Implement Quarterly Showcases

Hold quarterly meetings with your management where team members demonstrate their AI implementations, share learnings, and discuss both successes and failures. Use these to share goals for the next quarter's AI initiatives.

### 3 Start Department-Specific

Ask each department head to identify and implement one major operational improvement using AI within their area annually. This creates ownership and ensures relevant applications across the organization.



#### **4 Create Robust Test Processes**

When implementing new AI tools, thoroughly test outputs across multiple scenarios. For example, with voice generation, listen to entire recordings to catch potential errors or inconsistencies.

#### **5 Build Multi-Tool Workflows**

Instead of relying on single AI tools, create workflows that combine multiple tools for better results. For instance, use Perplexity for research, NotebookLM for analysis, and ChatGPT for final content creation.

#### **6 Record and Leverage Sales Calls**

Automatically record sales calls and use AI to analyze transcripts for creating customized proposals and improving sales enablement materials.

#### **7 Establish Document Libraries**

Create organized collections of successful RFPs, proposals, and other key documents in NotebookLM to train AI on your organization's best work.

#### **8 Implement Version Control**

When using AI for content creation, maintain clear processes for human review and approval, especially for client-facing materials.

#### **9 Create AI-Specific Brand Guidelines**

Develop clear parameters for AI tools regarding brand voice, approved terminology, and style requirements to maintain consistency.

#### **10 Track ROI Metrics**

Measure specific efficiency gains from AI implementation, such as time saved in content creation or increased proposal win rates, to justify continued investment and expansion.