




# Setting the Foundation for AI in your Agency

# AGENDA

- Who should be leading the AI charge at your agency?
- What should you include in your AI policies?
- What needs to be updated in your SOWs and MSAs
- How to Identify the best use cases for AI in your firm
- How to handle change management involved to get employees on board
- How to set benchmarks to ensure your AI is a success





Who should lead  
the charge?

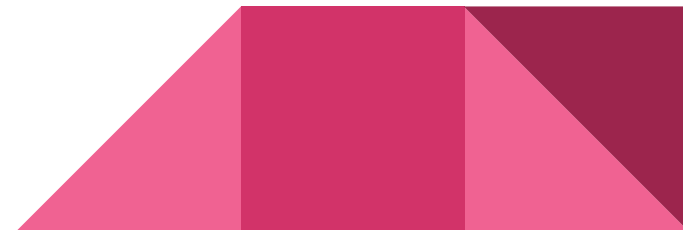
# Finding Your Unicorn

- A Savvy Digital Marketer
- Characteristics to Look For in Candidates
  - A self-starter with an **insatiable curiosity**
  - An analytics and strategic mindset to addressing challenges
  - Not afraid of failure and has a proven track record of piloting new ideas
  - Ability to win others over and influence others
  - Coding not required but API (zapier/make.com) experience a plus
- Preference to hire from within and provide resources for training on AI
  - Coursera: AI for Everyone
  - Marketing AI Institute Webinar & Conference



# Responsibilities

- Create your organizations AI Policies and Roadmap
- Draft communication that can be used in RFPs, Contracts and Client Communication
- Lead both the cross-departmental task force and AI governance
- Outline AI Pilot Programs & Evaluate AI software
- Keep your organization up to date on the latest AI news (Marketing AI Podcast, Ethan Mollick, Bloomberg AI)





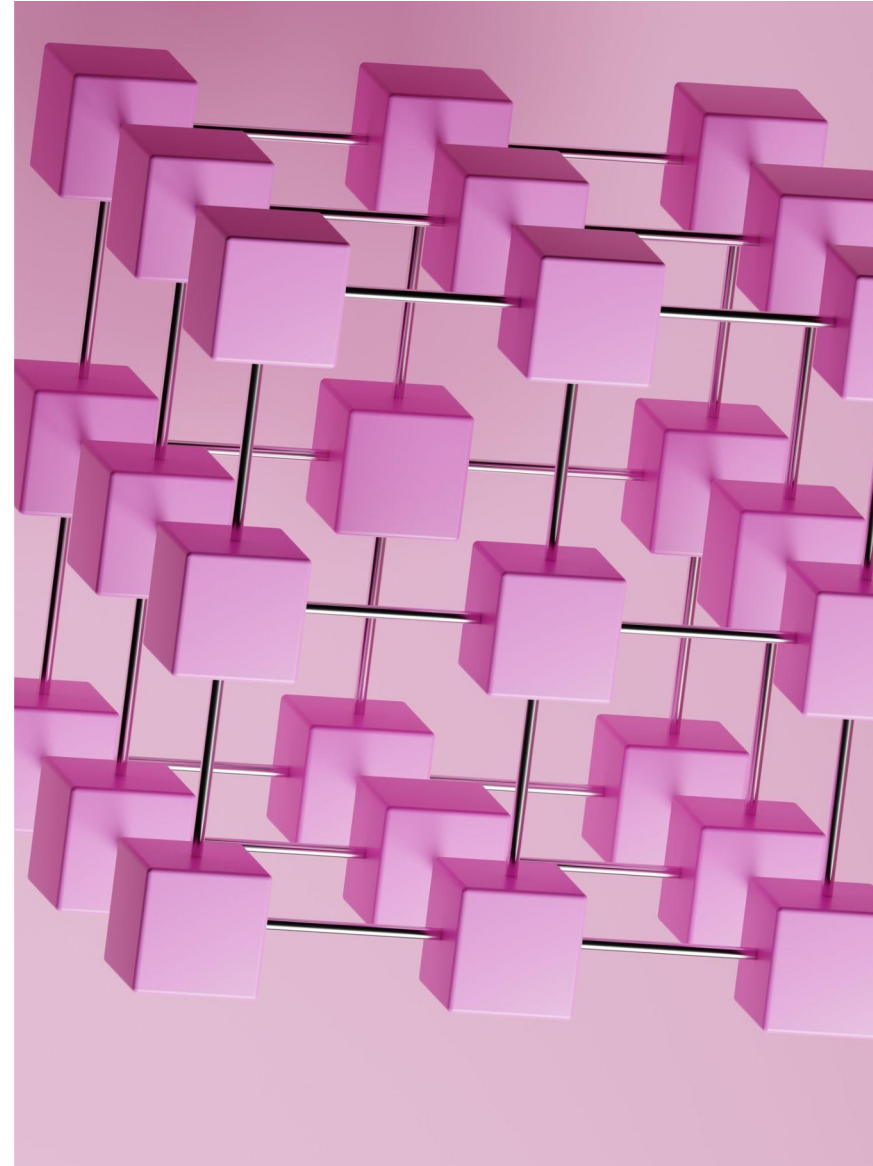
# Building Policies & Framework

# Building Your Policies & Governance Framework



# Updating Your Contracts

- **Organization's AI Philosophy**
  - Add language that your organization at times will leverage AI to help your subject matter experts become more efficient with their time
- **Copyright**
  - Clarity of communication on copyright of produced materials when AI is involved
- **Data**
  - Ensure you have language in contracts that allows you to leverage clients advertising data in an anonymized manner that collectively allow you to better support all of your clients



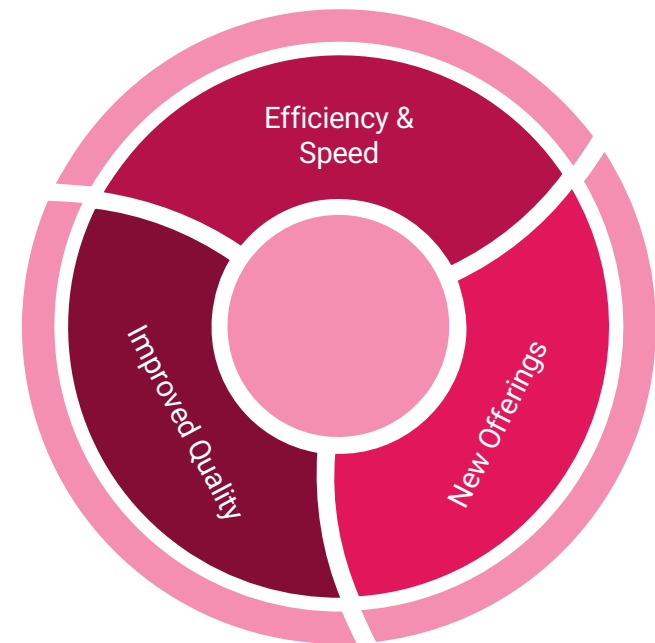




# Identify & Evaluate AI Opportunities

# Identify AI Opportunities

- **Data-Driven Decision Making:** Look for areas where large volumes of data are available but underutilized. AI can analyze and extract meaningful insights from this data, aiding in better decision-making.
- **Automation of Routine Tasks:** Identify repetitive, time-consuming tasks that don't require deep human judgment. AI can automate these tasks, increasing efficiency and freeing up human resources for more complex work.
- **Scalability Challenges:** When a business process or system struggles to scale with increased load or demand, AI can often provide scalable solutions.
- **Enhancing Research and Development:** leverage AI to help bring to market MVPs, conduct synthetic focus groups, etc.



# Evaluating AI Pilot Programs

AI Solution Category	Challenge or Opportunity Statement	Value Impact Statement	Est 1 Year Value	Total 3 Year Value	Solution Category	Hours to solve	Probability of Desired Outcomes	Change Management Impact	Cost	Notes
Increase Revenue	There are numerous RFPs that our agency doesn't have the ability to respond as the enormous lift. These RFPs typically larger in total contract value with the average contract around \$xxx in AGI.	We are currently have a xx% win rate for new business so if through AI we were able to complete x additional RFPs a year. Given our win-rate we anticipate bringing in x new clients year.	\$xx,xxxx	\$xx,xxx	Sweetspot	50-100 hours	High (75%+)	medium	Less than \$10,000 Annually	We will need to leverage a minimum of 50 past RFPs

- **AI Solution Category:** Improve Efficiency, Increase Revenue, Increase Leads, Reduce Churn, Improve Internal Process, New/Expanded Offering, Improved Decision Making, etc.
- **Challenge or Opportunity Statement:** State the current challenge or opportunity you are looking to address.
- **Value Impact Statement:** What will be the value of leveraging AI
- **Est. Year 1 Value:** the potential additional revenue or savings through implementation of AI pilot program.
- **Total 3 Year Est. Value:** total revenue or savings over the course of 3 years
- **Solution Category:** quick win, sweetspot or moonshot
- **Hours to Solve:** estimated hours to implement program
- **Probability of Desired Outcomes:** what is the likelihood you will achieve the complete desired outcome
- **Change Management:** roll-out and change management requirements
- **Cost:** this is where you outline any expenses associated with pilot

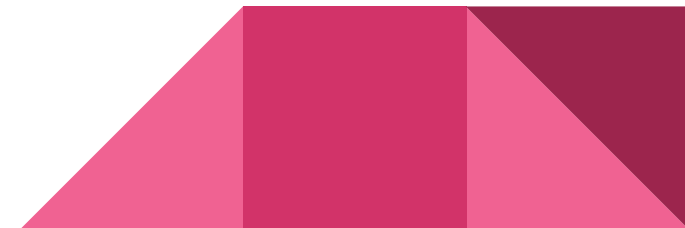
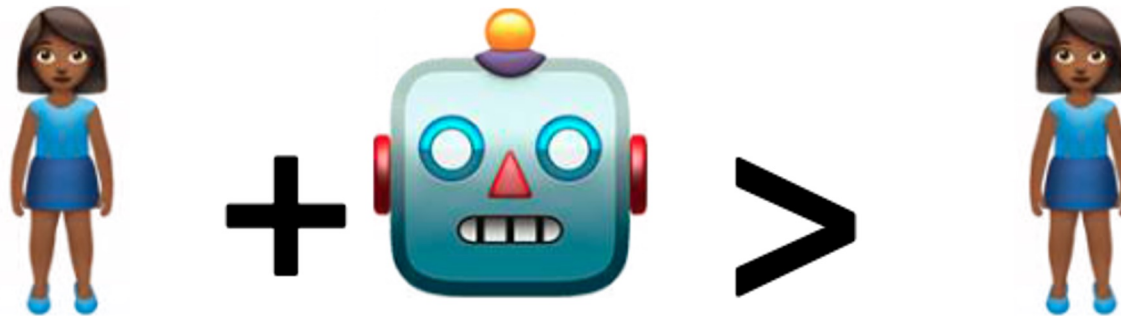


# Navigating Change Management with AI

# THE ELEPHANT IN THE ROOM



**“AI will take away tasks, not jobs.” – Brookings Institute**



# Content Marketing Today

Idea

Research

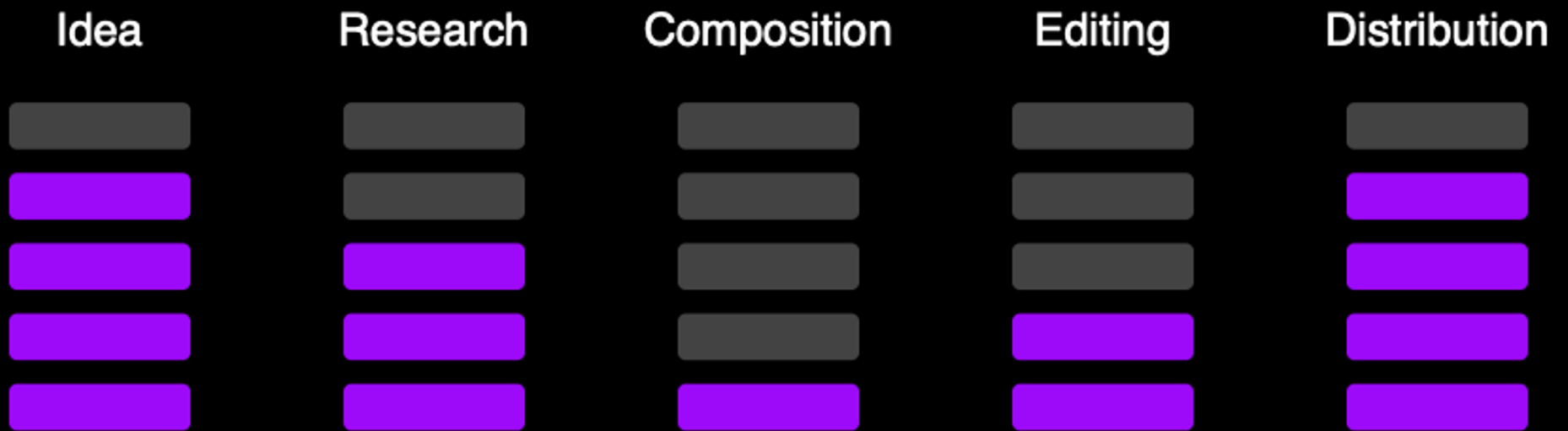
Composition

Editing

Distribution



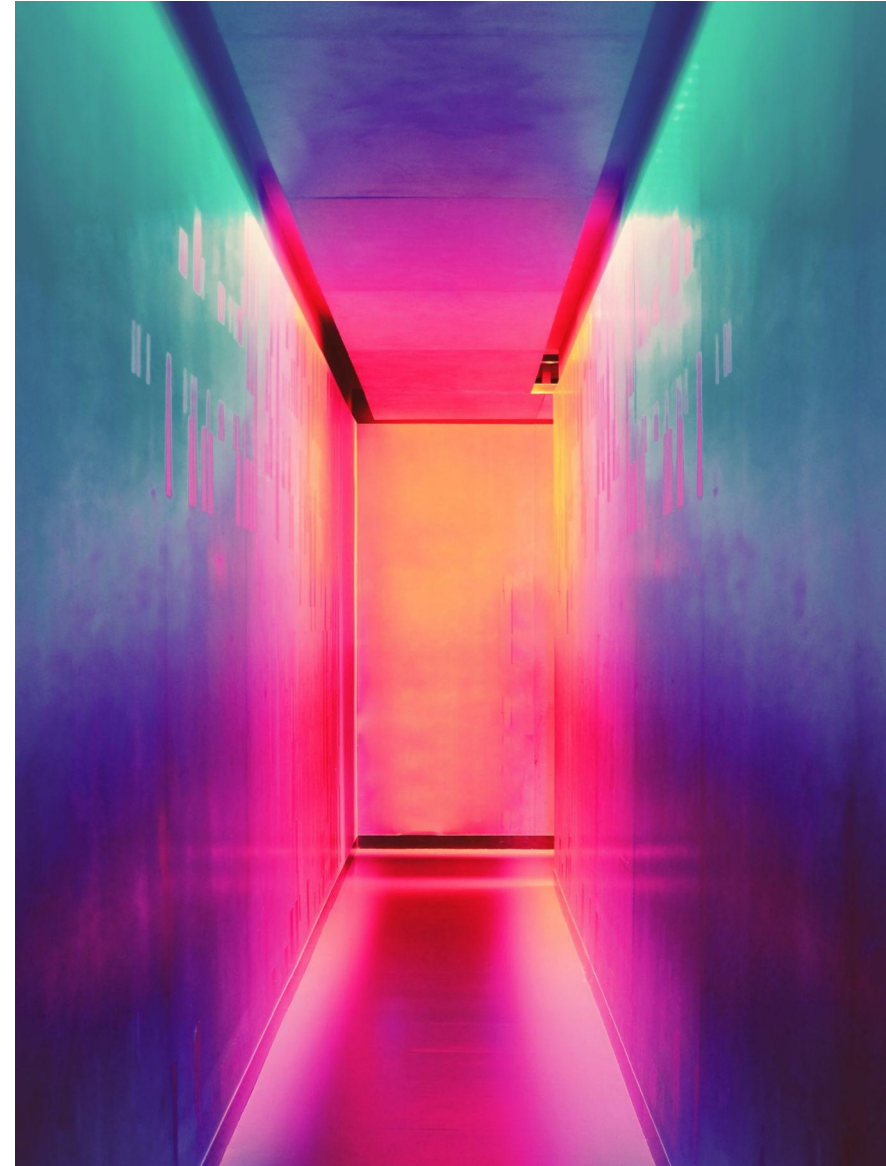
# AI-Assisted Content Strategy





# Getting Everyone Onboard

1. **Take Inventory:** You may be surprised that many of your employees may already be leveraging AI. Create an anonymous survey where team members can share the tools they are using and how it is helping them with their job
2. **Start with Listening:** have your AI lead spend time each team and shadow several projects and their standing meetings. Don't forget about HR and Finance.
3. **Give me an "A" Give me an "I":** identify cheerleaders within your organization across different departments who can help influence
4. **Embrace the Friction Points:** ask individuals to identify the pain points in their day-to-day and leverage AI to solve them



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# How to Measure Your Success

# Measure Impact of AI

- **Avg AGI per FTE:** As you enable AI in your organization you should start to see your AGI per FTE average increase. Start with a goal of improving your AGI per FTE by 10% from where you are today. AMI benchmark is \$175K per FTE.
- **Time Tracking & Benchmarking:** Identify common projects or tasks and develop time benchmarks and rounds of revisions to measure lift after implementation of AI.

**NOTE:** Another reason your organization needs to implement time-tracking





QUESTIONS?



# Building Your AI Toolbox

- Understanding AI Landscape
- How To Evaluate AI Tools
- 20 Favorite AI Tools





THANK YOU

