



Implementing AI in marketing work

Building a responsible AI-enabled marketing practice for research, planning, content operations, and campaign learning.

WORKS WITH THE ASSISTANTS TEAMS ALREADY USE



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AT A GLANCE

Building a responsible AI-enabled marketing practice for research, planning, content operations, and campaign learning.

Marketing teams are under pressure to produce more content, faster, across more channels. AI makes volume cheap, which is exactly why quality, brand voice, accuracy and trust now matter more. This playbook helps marketing leaders and practitioners build a practice that uses AI for audience research, planning, content operations, localization and campaign learning, with clear information rules, claim checking, brand and disclosure standards, and honest measurement. It is written to be used by a team in a working session and applied the following week.

WHO IT IS FOR Marketing leaders, content and campaign managers, brand and communications teams, and agencies working with them.

TIME TO USE 55 minutes to read; one team workshop to apply

What you will have at the end

- A marketing task map showing AI fit and the human checkpoint for each task
- Request templates for research, planning, drafting, adaptation and campaign review
- Brand, claims and disclosure rules the whole team can follow
- A review workflow that keeps quality and accuracy as volume rises
- Metrics that separate real campaign learning from output counts

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EXECUTIVE BRIEF

Cheap volume raises the bar on judgment

01



When anyone can produce a thousand words in a minute, advantage comes from knowing the audience, having a point of view and checking what you publish.

Marketing was early to adopt generative tools, and many teams have seen both the gains and the failures. The gains are real: faster first drafts, quicker audience synthesis, easier adaptation of one message into many formats, and less time on repetitive production. The failures are also real: generic copy, invented facts, off-brand tone, claims nobody can substantiate, and campaigns that reflect what an assistant tends to say rather than what the audience needs.

02

A responsible practice treats AI as a drafting and analysis assistant inside a managed workflow. Strategy, positioning, claims and final approval remain with named people. The team agrees on its brand voice in writing, keeps a record of approved facts and proof points, and sets rules on disclosure and on data from customers and audiences.

- Use AI for synthesis, structure, first drafts, variations, localization drafts and analysis support.
- Keep positioning, brand decisions, claims approval and publication with accountable people.
- Base content on a supplied fact base, not on the assistant's general knowledge.
- Keep customer, audience and unreleased campaign information inside approved tools.
- Judge success by audience response and business outcomes, not by pieces produced.



THE WORKING PRINCIPLE

Spend the time AI saves on thinking about the audience and on checking the work. If saved time goes only into more output, quality and trust will fall.



Advertising, endorsement, privacy and intellectual property rules differ by market and change over time. This playbook does not give legal advice. Check current requirements with your legal and compliance contacts and follow your own policies and platform rules.

WORKING QUESTION

What does your team publish that a competitor with the same AI tools could not have written?

THE WORK MAP

Which marketing tasks suit AI and where people decide

02

Production and analysis support are strong fits. Strategy, claims and brand stewardship need accountable human control.

TASK	GOOD FIT FOR AI	HUMAN CHECKPOINT
Audience research synthesis	Strong: summarizes interviews, reviews, survey comments	Researcher confirms themes against raw material
Content planning and briefs	Good: options, outlines, angles	Strategist chooses direction and priorities
First drafts of articles, emails, posts	Good with a fact base and style guide	Editor checks facts, voice and originality
Variations and format adaptation	Strong	Owner reviews each variant before use
Localization drafts	Good as a starting point	Native-level reviewer checks meaning and cultural fit
Campaign reporting and learning summaries	Good: structures and describes data	Analyst verifies figures in the source system
Claims, comparisons, testimonials, regulated topics	Do not delegate	Legal or compliance review and accountable approval

Look at the pattern in the right-hand column. Marketing risk is concentrated in a few places: factual claims, comparisons with competitors, endorsements and testimonials, sensitive topics, and anything that uses personal data. Concentrate human review there instead of spreading it

thinly across everything.

Content tiers

- Tier 1, low risk: internal summaries, brainstorming, outlines. Light review.
- Tier 2, standard: blog posts, emails, social posts with no new claims. Editor review against the fact base.
- Tier 3, sensitive: product claims, pricing, comparisons, health, finance or safety topics, customer stories. Subject expert and compliance review.
- Tier 4, restricted: crisis communication, executive statements, regulated disclosures. Written by accountable people, with AI used at most for proofreading.

Assign every content type a tier once, write it down and revisit it quarterly. This avoids case-by-case arguments under deadline pressure and gives agencies and freelancers the same rules.

WORKING QUESTION

Which of your regular content types sits in tier 3 or 4 without anyone having said so?

SETTING UP SAFELY

Information rules, brand standards and disclosure

03

Set the facts the assistant may use, the voice it must match and the information it must never see.

Three documents make most of the difference: a fact base, a voice guide and an information rule sheet. The fact base lists approved claims, product details, proof points and their sources and dates. The voice guide describes tone with examples of good and bad copy. The rule sheet states what data may go into which tools. Together they make outputs better and reviews faster.

INFORMATION	RULE	PRACTICE
Customer lists and personal data	Approved tools only; avoid where possible	Use aggregated or anonymized insight
Unreleased campaigns, pricing, launches	Approved tools with restricted access	Limit to those who need it
Customer interviews and survey comments	Remove names and identifiers first	Check consent covers this use
Agency and partner briefs	Share only under agreed terms	Confirm their AI use and data handling in writing
Public content and published material	Generally fine	Still verify facts and rights

Marketing setup

- Fact base with source and date for every claim
- Voice guide with five good and five poor examples
- Approved tools and account settings reviewed for data retention
- Rights position: what the team may use as input and what it may publish
- Disclosure rules for AI-generated or AI-assisted content where platforms, partners or regulators expect it
- Agency and freelancer terms covering AI use, confidentiality and review

COMMON MISTAKE

Asking an assistant to write about your product without supplying the facts. It will fill gaps with plausible statements, and some will be wrong or unsupportable. Always provide the fact base and instruct it to use only that.

On images, audio and video, check the terms of your tools, the rights to inputs and outputs, and any requirements on labeling synthetic media. Policies and rules are evolving, so ask your legal contacts for current guidance before using generated media in public campaigns.

WORKING QUESTION

If a new freelancer started tomorrow, what three documents would you hand over to keep their AI-assisted work on brand and accurate?

TASK PLAYBOOKS

Research, planning, drafting and adaptation, step by step

04



Good requests give the audience, the objective, the facts, the voice and the format, and ask the assistant to flag what it is unsure of.

Playbook 1: audience research synthesis



- 01 Prepare the material**
Remove names and identifiers from interview notes, reviews or survey comments. Confirm consent allows this use.
- 02 Ask for themes with evidence**
Request themes, each with representative quotes and counts, and a list of views that do not fit.
- 03 Check against raw data**
Spot-check themes and counts. Read a sample of comments the assistant did not cite.
- 04 Turn into decisions**
State what the audience needs, what they say in their own words and what to test.



REQUEST TEMPLATE: RESEARCH SYNTHESIS

Below are 40 anonymized customer comments. Group them into themes. For each theme give a one-line description, how many comments support it, two verbatim quotes, and comments that contradict it. List what the comments do not tell us. Do not generalize beyond the text.



Playbook 2: content brief and draft

- 01 Write the brief yourself**
Audience, objective, the one idea, the call to action, required facts and sources, and what to avoid.

02 Generate an outline

Ask for two outline options. Choose and edit.

03 Draft from the fact base

Ask for a draft using only the supplied facts, with [SOURCE NEEDED] where support is missing.

04 Edit as a writer

Add specifics, examples and a point of view only your team has. Cut filler.

05 Review by tier

Route to subject expert or compliance if the content is tier 3.

REQUEST TEMPLATE: DRAFT

Write a 600-word article for operations managers at mid-sized manufacturers. Objective: explain why changeover time matters. One idea: small changes in setup order cut downtime. Use only these facts: [paste]. Voice: plain, direct, no hype, no superlatives. Mark [SOURCE NEEDED] wherever a claim lacks support in the facts. Do not invent examples or statistics.

Playbook 3: variations and localization

Ask for variations that differ on one variable at a time, such as angle, length or call to action, so tests produce learning. For localization, request a draft that preserves meaning and tone, plus a list of phrases where cultural fit is uncertain. A fluent reviewer must read it. Machine drafts can be grammatical and still wrong in register, humor or implication.

REQUEST TEMPLATE: ADAPTATION

Adapt the approved email below into three variants for a LinkedIn post, a short SMS and a webinar invitation. Keep every claim unchanged and add none. For each, state which facts it relies on. Flag any wording that could be read as a promise.

WORKING QUESTION

Which playbook would remove the most repetitive effort from your next campaign cycle?

CAMPAIGN LEARNING

Using AI to learn from campaigns without misreading the data

05



Assistants can describe data and suggest hypotheses. They cannot tell you what caused a result.

Campaign analysis is where pattern language meets small samples. An assistant may offer a neat explanation for a click-through change that is just noise, or credit a creative choice when the real driver was a channel mix shift. Use it to structure the questions and to write up findings in plain language, but make the figures come from your analytics system and keep a clear line between observation and speculation.

- 01 Define the question and the test**
State the hypothesis, the metric, the sample and the period before the campaign runs.
- 02 Pull the data yourself**
Export from analytics or ad platforms. Do not ask the assistant to recall or estimate figures.
- 03 Ask for description and options**
Request a neutral summary, anomalies and alternative explanations.
- 04 Test the explanations**
Check each alternative against segments, timing and spend before concluding.
- 05 Record the learning**
Write one paragraph: what we tried, what happened, how sure we are, what we do next.



REQUEST TEMPLATE: CAMPAIGN REVIEW

Here is the table of results by creative, channel and week (exported, not edited). Describe what changed in plain terms. List five possible explanations beyond the creative itself, such as audience, spend or seasonality, and for each name the cut of data that would test it. Do not state causes as facts.



QUESTION	WHY THE ASSISTANT CAN MISLEAD	SAFER APPROACH
Which headline won?	Small samples look decisive	Check volume and run-length before concluding
Why did conversions rise?	Narrative fits any outcome	Test against spend, audience and timing
What will next quarter bring?	Forecast language sounds confident	Use forecasts from your analytics team with stated assumptions

WORKING QUESTION

What was the last campaign lesson your team wrote down that you would still defend with the data in front of you?

VERIFICATION AND REVIEW

A review workflow that keeps accuracy and voice as volume rises

06

Review is the control. Make it fast, specific and proportional to the tier.

Editor checklist before publishing

- Every factual claim matches the fact base or a source that has been opened
- No statistics, quotes, names or studies appear that you did not supply and verify
- Product claims, comparisons and endorsements have been approved by the right owner
- The voice matches the guide and sounds like a person with a view
- Nothing resembles another publisher's work too closely; rights are clear
- No personal or confidential data appears
- Required disclosures and labels are in place
- The piece says something specific that a generic version could not

FAILURE	HOW IT APPEARS	CHECK
Invented source or statistic	A precise number with a vague origin	Find the original; delete if absent
Generic voice	Familiar phrases, empty openings	Compare to the voice guide; add specifics
Unsupported claim	Superlatives or guarantees	Match to the fact base; remove if unsupported
Competitor misstatement	Inaccurate comparison	Route to legal and verify with public sources
Cultural miss in localization	Literal but awkward or offensive	Reviewer fluent in the language and market

Make review proportionate. A tier 1 note needs a glance. A tier 3 product comparison needs a subject expert and compliance. Record who approved what. For work with agencies, require the same checks and ask for the fact sources they used, so accountability is clear.

ILLUSTRATIVE EXAMPLE

An assistant drafts a blog intro with the line that most manufacturers lose a fifth of capacity to changeovers. No source was supplied. The editor searches, cannot find it and cuts it. The article now makes a point supported by the team's own customer data instead.

WORKING QUESTION

Who in your team has the authority to stop a piece from publishing, and do they use it?

MEASURING RESULTS

Measuring efficiency and effectiveness separately

07

Time saved is easy to measure and easy to misuse. Track audience response and quality alongside it.

Baseline production time and quality before the change. For a few content types, record hours from brief to publication and the number of review rounds. Then add outcome measures that matter to the business, such as qualified engagement, conversion on the page or in the sequence, and feedback from sales on lead quality. Avoid vanity measures like pieces published.

METRIC	HOW TO MEASURE	HEALTHY SIGNAL
Hours brief to publish	Workflow tool or time log	Falling
Review rounds per piece	Count of edit cycles	Falling or steady with stable quality
Claims corrected at review	Count of unsupported claims caught	Falling as inputs improve
Audience response	Engagement quality, conversion, unsubscribes	Steady or rising, not falling
Lead quality feedback	Sales view of marketing-sourced leads	Not worsening
Brand consistency	Sample audit against voice guidelines	Improving
Test velocity	Experiments run with clear hypotheses	Rising

ILLUSTRATIVE NUMBERS ONLY

If a newsletter takes 6 hours and now takes 4 with the same quality, the team gains 2 hours per issue. The figures are illustrative. Decide in advance where the saved time goes, such as audience interviews or more testing.

Beware of false comfort from increased volume. If output doubles and engagement per piece halves, the net result may be flat or negative and the audience may be tiring of you. Prefer fewer, better pieces and more learning per campaign.

WORKING QUESTION

If your output doubled next month, which metric would show whether it helped?


TEAM ROUTINES

Roles, libraries and rhythms that keep the practice healthy

08

II

A few standing routines let the team improve together and keep agencies aligned.

- Fact base owner: keeps claims, proof points and sources current, with dates and review cycles.
- Voice guardian: maintains the voice guide and audits samples monthly.
- Template library: tested briefs and requests per content type, versioned.
- Weekly share: one example of AI saving effort and one where it failed, with lessons.
- Quarterly policy review: tiers, tools, disclosure and agency terms updated against what changed.



01 Pilot

Pick two content types and a small group for six weeks.

02 Document

Write the brief template, fact base entries and review tier for each.

03 Review results

Compare time, quality and audience metrics to the baseline.



04 Extend

Add content types and channels as the checks hold.

 K

Working with agencies and freelancers

Ask partners how they use AI, which tools and what data they enter, and agree this in writing. Share your fact base and voice guide so they work from the same sources. Require disclosure of AI use where it affects rights, confidentiality or quality, and keep review rights on every deliverable.

WHAT TO NEVER DELEGATE

Brand positioning, the decision to publish, claims and comparisons, handling of audience data, crisis communication and any statement made on behalf of leadership. AI can help prepare. Accountable people decide.

WORKING QUESTION

Who owns your fact base, and when was it last checked against reality?

PITFALLS

Where AI-enabled marketing goes wrong, with one illustrative scenario

09

Most pitfalls come from unsupported claims, sameness and unclear accountability.

- Publishing generic content that adds nothing and trains the audience to ignore you.
- Letting an assistant invent proof points, statistics or testimonials.
- Pasting customer data into unapproved tools for segmentation or copy.
- Using generated images or text without checking rights and labeling expectations.

- Treating a campaign summary as proof of cause.
- Leaving agencies outside your AI rules.

ILLUSTRATIVE SCENARIO (HYPOTHETICAL)

A fictional retailer's team generates a month of social posts in an afternoon. One post states that a product is 'clinically proven' to work, a phrase the assistant added. No one checked. A customer complains and the post is removed. Under the new process, such phrases need a source in the fact base or compliance sign-off.

The point is not that the tool misbehaved. It did what such tools do, which is complete patterns. The process lacked a rule that every claim needs a source. Adding that rule and a [SOURCE NEEDED] marker removed most of the risk at low cost.

Warning signs

- Posts across channels start to sound alike.
- Reviewers say they no longer have time to check facts.
- Audience comments mention that content feels automated.
- Agency deliverables arrive faster but with more errors.

Respond by reducing volume, restoring the review step and renewing the fact base. Revisit your policies on advertising claims, disclosure and data with your legal contacts as rules and platform requirements change.

WORKING QUESTION

Which warning sign would your audience notice before your team does?

30 / 60 / 90

A first quarter that produces evidence

10

Build the fact base and voice guide first, pilot two content types, and let measurement decide where to extend.

First 30 days: ground it

- Write the fact base, voice guide and information rule sheet
- Assign every content type a risk tier
- Baseline hours, review rounds and audience metrics for two content types
- Confirm approved tools and agency terms on AI use

Days 31 to 60: test it

- Pilot the research, brief and draft templates with a small group
- Introduce the editor checklist and the SOURCE NEEDED marker
- Run a monthly voice audit on a sample of published pieces
- Compare time and quality measures with the baseline

Days 61 to 90: decide

- Extend to variations, localization and campaign review where the checks hold
- Hold a retrospective and update templates and tiers
- Review disclosure and rights practices with legal contacts
- Decide what to scale, change or stop based on audience results

GLOSSARY

Terms used in this publication

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TERM	MEANING
Fact base	A maintained list of approved claims, proof points and product details with sources and dates.
Voice guide	A written description of brand tone with examples of good and poor copy.
Content tier	A risk category that sets how much review a piece of content needs.
Localization	Adapting content to a language and market so meaning, tone and references fit.
Claim substantiation	Having evidence on file that supports a statement made in marketing.
Hallucination	A confident but false or unsupported statement produced by an assistant.
Variant testing	Comparing versions that differ on one variable to learn what works.
Disclosure	Telling an audience, partner or platform that AI helped create content where expected or required.
Synthetic media	Images, audio or video generated or altered by AI.
Attribution	Assigning credit for a result to a channel or campaign, which is often uncertain.
Segmentation	Dividing an audience into groups with shared needs or behavior.
Brand drift	Gradual loss of a consistent voice and look as content volume and contributors grow.

A note on use

This playbook offers general working guidance and is not legal advice. Advertising, privacy and intellectual property rules vary and change, so check current requirements and your own policies.



TAKE THE NEXT STEP

Take the free Halden assessment at halden.company/assessments, or talk to us at halden.company/contact about turning this into a plan for your organization.

