



RESPONSIBLE AI

Marketing AI Implementation Checklist



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Executive Summary

The Marketing AI Implementation Checklist is a comprehensive guide for responsibly integrating AI into marketing strategies. It covers 13 key areas, from leadership vision to continuous improvement, providing actionable steps for each stage of AI adoption.

Key areas include:

1. Leadership AI Vision and Steering Committee
2. Exploration and Business Case Development
3. Use Case Approval and Pilot Program
4. Governance Protocols
5. Data Strategy
6. Vendor Evaluation
7. Workforce AI Readiness
8. Development Guidelines
9. Risk Management
10. Monitoring and Oversight
11. Incident Response Preparedness
12. Transparency and Disclosure
13. Continuous Improvement

The checklist emphasizes ethical considerations, legal compliance, and risk mitigation. It guides organizations in aligning AI initiatives with business goals, ensuring responsible data use, and fostering a culture of continuous learning.

This comprehensive checklist, designed for mid-to-large organizations across all AI maturity levels, serves as a versatile tool for crafting AI strategies, evaluating vendors, implementing robust governance frameworks, and effectively monitoring performance. By following this guide, marketing teams can leverage AI to drive innovation and growth while maintaining high ethical standards and consumer trust.

Introduction

As AI becomes increasingly prevalent in marketing, it is crucial to approach its adoption with careful planning, ethical considerations, and ongoing oversight.

The Marketing AI Implementation Checklist is a comprehensive guide designed to help marketing teams navigate the complexities of integrating artificial intelligence into their strategies.



This checklist focuses primarily on generative AI, which includes technologies like large language models, text-to-image generation, and other AI systems that can create new content. However, many of the principles and steps outlined here are applicable to the broader spectrum of AI technologies used in marketing.

This checklist provides a step-by-step framework for implementing AI technologies responsibly and effectively, ensuring alignment with organizational goals, legal requirements, and ethical standards. It covers key aspects such as strategic planning, data governance, vendor selection, workforce training, and performance monitoring.

By following this checklist, marketing teams can:

1. Align AI initiatives with business objectives and customer needs
2. Ensure ethical and responsible use of AI and data
3. Comply with legal requirements and manage potential risks
4. Encourage a culture of continuous learning and improvement

Whether an organization is new to AI or looking to scale existing initiatives, the Marketing AI Implementation Checklist serves as a valuable resource to guide decision-making and ensure successful outcomes. By leveraging this tool, marketing teams can harness the power of AI to drive innovation, enhance customer experiences, and achieve sustainable growth while upholding the highest standards of ethics and responsibility.

1. Leadership AI Vision and Steering Committee

- Define Strategic AI Vision:** Articulate how AI integration aligns with business goals, values, and ethics.
- Establish AI Steering Committee:** Form a diverse, cross-functional committee to oversee responsible AI adoption. It should include leaders from marketing, product, legal, trust & safety, and privacy departments.
- Assign AI Leadership and Ownership:** Designate a senior leader to drive AI adoption, training, and change management within marketing. This leader should oversee responsible AI practices, ensure adherence to ethical standards, and have clear executive sponsorship with a direct line to key decision-makers.

2. Exploration and Business Case Development



- ❑ **Identify Potential Use Cases:** Pinpoint high-impact AI applications that align with marketing objectives and could enhance consumer experiences or drive business outcomes.
- ❑ **Analyze Industry AI Adoption:** Conduct a thorough analysis of AI usage in your sector and industry. Take a closer look at how your peers and competitors are leveraging AI technologies. Also, explore AI applications in adjacent industries to identify potential opportunities for innovative adoption. This broader perspective can open new horizons for your organization's AI strategy.
- ❑ **Assess Feasibility:** Evaluate the viability of identified use cases, considering data availability, technology requirements, operational readiness and potential ROI.
- ❑ **Build Business Cases:** Quantify expected benefits, costs, risks, and timelines for viable initiatives. Incorporate insights from your industry and competitive analysis to strengthen your business case. Demonstrate how the proposed AI applications align with industry trends and can provide a competitive edge.

3. Use Case Approval and Pilot Program

- ❑ **Secure Formal Approval:** Present the selected use case(s), along with the associated business case(s), benefits, and risk management plan to the AI Steering Committee and leadership. Gain resource commitments for a pilot program to validate assumptions.
- ❑ **Execute Pilot Program:** Initiate a pilot program with clear guidelines, oversight, and predefined success metrics. Run small-scale, controlled experiments to validate value, assess adherence to governance protocols, and gather learnings to refine implementation plans. Share results with the leadership team to demonstrate effectiveness, identify gaps, and inform decision-making for wider rollout.

4. Governance Protocols

- ❑ **Draft Responsible AI Principles:** Establish internal principles reflecting the company's values, ethical commitments, and sustainability goals to guide AI development and deployment. These principles should also provide guidance on how to manage trade-offs that may arise between different objectives, such as balancing privacy and personalization or weighing the benefits of AI against potential risks.
- ❑ **Draft AI Governance Document:** Create a comprehensive document outlining rules, responsibilities, and ethical guidelines for AI usage within the organization. This should include guidelines on data collection, storage, processing, and sharing to protect consumer privacy and comply with regulations like GDPR.
 - **Draft Generative AI Policy:** As a sub-section of the AI Governance Document, utilize MMA's [Generative AI Governance Framework](#) to draft a policy for generative AI usage. This policy should detail what is permissible for both internal

and external purposes, disclosure requirements, and data protection measures to guide responsible use.

- ❑ **Define Rules and Responsibilities:** Clearly define who is accountable for overseeing various aspects of AI projects to ensure end-to-end responsibility. This should include roles and responsibilities for implementing and enforcing the AI policies.

5. Data Strategy

- ❑ **Data Collection and Governance:** Prioritize collecting zero-party and consensual first-party data, and establish clear standards for data collection, usage, storage, access control, and disposal that prioritize consumer privacy, consent, and ethical usage.
- ❑ **Data Validation and Suitability:** Validate existing datasets for accuracy, relevance, and compliance with ethical standards and privacy regulations, ensuring their suitability for the intended AI use cases.
- ❑ **Data Processing and Protection:** Implement strict protocols for data processing, validation, and sharing based on data sensitivity levels, with appropriate security measures to protect PII and non-PII data.
- ❑ **Data Access, Authorization, and Collaboration:** Define clear guidelines for data access, authorization, and responsible collaboration with external partners, including data minimization and anonymization techniques to protect consumer privacy.
- ❑ **Audits and Oversight:** Ensure regular audits, human oversight, and alignment with evolving regulations and best practices to maintain the integrity and security of your data assets.

6. Vendor Evaluation

- ❑ **Explore Existing Vendor Capabilities:** Before evaluating new vendors, investigate if current technology partners (email, search, social, CRM, design, analytics, CX) have added AI features that could support cost-effective experimentation in pilot projects.
- ❑ **Conduct Vendor Due Diligence:** Assess potential AI vendors' ethical practices, data handling, model quality, transparency of decisions, performance, costs, and technology foundations using MMA's ['Is it Real AI?' Framework](#). Ensure vendors use data only for the contracted use case.
- ❑ **Perform Cost-Benefit Analysis:** Evaluate the costs and potential long-term dependencies associated with each vendor against the expected benefits and scope of work to ensure a favorable return on investment.
- ❑ **Implement Regular Vendor Audits:** Establish processes to regularly review vendors' adherence to contractual obligations, ethical standards, and performance benchmarks, including audits of model quality and data usage.

7. Workforce AI Readiness

- ❑ **Implement Comprehensive AI Education:** Deliver training on AI fundamentals, ethical considerations, regulations, accuracy expectations, and job-specific applications for all affected marketing staff. Incorporate hands-on experience and AI literacy into existing professional development programs, enabling team members to stay informed about AI advancements and their implications.
- ❑ **Formalize Onboarding and Usage Expectations:** Create standardized onboarding procedures for AI tools with minimum usage tied to value realization.
- ❑ **Integrate AI Metrics into Success Measures:** Establish KPIs to measure the impact of AI training, adoption, and usage on marketing outcomes, and integrate these metrics, including ethical considerations and responsible AI usage, into overall campaign success measures. Regularly assess and iterate based on insights gained to ensure continuous improvement.

8. Development Guidelines

- ❑ **Create Phased AI Integration Roadmap:** Develop a detailed plan outlining incremental AI implementation with milestones and performance indicators.
- ❑ **Embed 'Privacy by Design' Principles:** Prioritize data privacy throughout the AI development lifecycle to protect consumer information and mitigate risks.
- ❑ **Implement Human-in-the-Loop Processes:** Define protocols for human oversight and intervention to validate data inputs, monitor model performance, and review outputs to ensure relevance, accuracy, and ethical alignment.
- ❑ **Adopt Test-and-Learn Approach:** Run small-scale experiments comparing AI to traditional methods to gauge impact, capture learnings, and inform iteration before scaling.
- ❑ **Build AI Capabilities Gradually:** Develop in-house AI skills over time based on proven value from pilots to ensure purposeful, sustainable growth.

9. Risk Management

- ❑ **Conduct AI Risk Assessments:** Proactively identify and evaluate potential risks across AI initiatives using MMA's [Marketing AI Risk Evaluation Framework](#).
- ❑ **Develop Risk Mitigation Strategies:** Create targeted action plans to address identified AI risks, including safeguards to protect corporate and consumer data when using AI tools.
- ❑ **Maintain Detailed Risk Documentation:** Consistently document risk assessment methodologies, findings, and remediation steps for transparency and accountability.
- ❑ **Embed AI Requirements in Contracts:** Incorporate clauses defining generative AI usage rights, data usage limitations, audit provisions, and expectations for ethical, transparent AI development and ongoing monitoring in agency contracts.

10. Monitoring and Oversight

- ❑ **Establish an Ethics Audit Routine:** Schedule periodic ethical audits of AI projects, preferably conducted by an independent external auditor, to ensure adherence to established protocols and identify areas for improvement. If an external audit is not feasible, ensure the internal audit team operates with autonomy and reports directly to senior leadership.
- ❑ **Leverage Automated Monitoring Tools:** Use tools mentioned in MMA's [Marketing AI Risk Evaluation Framework](#) to continuously monitor AI systems for deviations from expected ethical and operational parameters.
- ❑ **Continuously Evaluate AI Performance:** Establish processes for ongoing evaluation of AI tools and strategies based on performance data, evolving objectives, and marketing goals. Adapt implementations as needed.

11. Incident Response Preparedness

- ❑ **Define AI Incident Severity and Protocols:** Establish clear criteria for assessing the magnitude of AI incidents and step-by-step response procedures for investigation, mitigation, and reporting.
- ❑ **Update Crisis Management Plans:** Incorporate AI-specific scenarios and response tactics into existing crisis management frameworks.
- ❑ **Assign Cross-Functional Response Teams:** Identify key individuals across functions who can quickly mobilize to address AI incidents, comprising members from legal, ethics, technology, and communications departments.

12. Transparency and Disclosure

- ❑ **Provide AI Transparency Reports:** Compile and share periodic reports detailing AI usage, performance, ethical adherence, impact, and environmental considerations with internal and external stakeholders.
- ❑ **Maintain Accessible AI Documentation:** Ensure comprehensive, up-to-date records of AI governance protocols, risk assessments, and system functionalities are easily available.

13. Continuous Improvement

- ❑ **Establish a Learning and Dissemination Plan:** Develop a plan to gather insights from AI program reviews, stakeholder feedback, and industry developments, and share them across the organization through planning cycles, training, and partnerships.

- ❑ **Conduct Regular AI Program Reviews:** Assess AI initiatives' performance against goals, ethical adherence, and best practices quarterly, aligning with the organization's planning cycles.
- ❑ **Gather and Act on Stakeholder Feedback:** Establish feedback mechanisms for stakeholders to share input on AI experiences, and communicate how insights are being used to drive improvements.
- ❑ **Evolve Governance Processes:** Update AI governance frameworks, policies, and risk assessment approaches to reflect changes in regulations, societal expectations, and technological capabilities.
- ❑ **Stay Current with AI Advancements:** Monitor the latest developments in marketing AI and adjust strategies to capitalize on innovations while upholding ethics and transparency.

Why is it helpful and when should you use it?

The Marketing AI Implementation Checklist is a valuable resource for organizations looking to integrate AI into their marketing strategies effectively and responsibly. By providing a structured approach, this checklist ensures that AI initiatives align with business goals, adhere to ethical and legal standards, and are positioned for long-term success.

Following this checklist increases the likelihood of achieving superior results from AI investments by guiding organizations through critical considerations, from strategic planning to risk management. This, in turn, contributes to better ROI and cost savings.

The checklist also emphasizes the importance of ethical considerations and legal compliance, which are essential for maintaining consumer trust and brand reputation. By embedding these aspects into the AI implementation process, organizations can promote transparency and ownership.

Moreover, the checklist highlights the significance of risk management in AI adoption, helping organizations identify and mitigate potential risks early on to prevent unintended consequences and ensure responsible AI use.

The Marketing AI Implementation Checklist is highly versatile and can be used by organizations of various sizes, industries, and stages of AI adoption. Whether you are developing an AI strategy, selecting vendors, executing pilot projects, establishing governance frameworks, training employees, or monitoring AI performance, this checklist serves as an indispensable guide.

Acknowledgment

We extend our gratitude to a distinguished group of individuals whose contributions have supported the development of the Marketing AI Implementation Checklist, a guide for adopting AI technologies responsibly and effectively.

MMA's AI Leadership Coalition (ALC):

We also acknowledge MMA Global's AI Leadership Coalition (ALC). Comprising over 300 members from more than 160 brands, the ALC is the largest working group dedicated to responsibly and effectively applying AI in marketing.

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ALC Contributors:

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ALC Members:



About the Author

Alec Foster, a trailblazer in responsible AI and ethical marketing, brings over a decade of expertise honed at Google, the White House, and entrepreneurial ventures. As MMA Global's Responsible AI Subject Matter Expert, Alec champions social progress and sustainable innovation through responsible AI practices in marketing. With an M.St. in AI Ethics from the University of Cambridge and a CIPP/US privacy certification, Alec excels in crafting AI-driven growth strategies that align consumer trust with business objectives. His contributions include developing machine learning models that simplify consumer arbitration and serving on the boards of algorithmic accountability nonprofits. Guided by his mission to champion transparent, respectful, and integrity-driven technology, Alec Foster leaves an indelible mark on the world of responsible AI and ethical marketing.

About MMA

Comprised of over 800 member companies globally and 15 regional offices, the MMA is the only marketing trade association that brings together the full ecosystem of marketers, martech, and media companies working collaboratively to architect the future of marketing while relentlessly delivering growth today. Led by CMOs, the MMA helps marketers lead the imperative for marketing change – in ways that enable future breakthroughs while optimizing current activities. The MMA is committed to science and questioning and believes that creating marketing impact is steeped in constructively challenging the status quo, encouraging business leaders to aggressively adopt proven, peer-driven, and scientific best practices without compromise. The MMA invests millions of dollars in rigorous research to equip marketers with unassailable truth and actionable tools. By enlightening, empowering, and enabling marketers, the MMA shapes future success while propelling business growth.



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