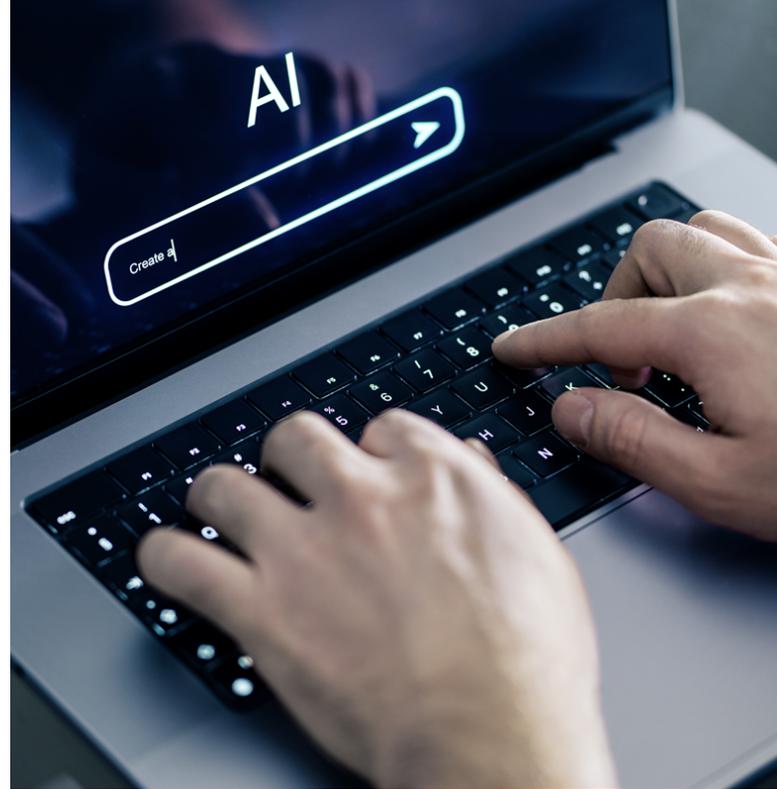


# Safely Using AI To Enhance B2B Marketing Strategies & Business Results

TMSA | October 22, 2025





## AI Marketing Today & Tomorrow

- Where are we with AI and where are we going?

## How to Safely Invest in AI for Team Success

- Developing a strategy for AI adoption with Strategies, People, Systems & Software

## Practical Examples

- Developing a custom GPT for personalized content and campaign optimization
- C.R.I.T. – Prompt writing techniques to enhance AI effectiveness

## Guidance for the (Legally Compliant) Deployment of AI Tools

- Kris Chandler, Benesch, Friedlander, Coplan & Aronoff

# Today & Tomorrow

The Possibilities of AI in Marketing



# Artificial General Intelligence (AGI)



Sometimes called human-level intelligence AI—is a type of artificial intelligence that would match or surpass human capabilities across virtually all cognitive tasks.



It is believed that AGI will be capable of doing the work of an “average” employee in the next 1–2 years!

# Where is AI today?

The five levels of AI, as defined by OpenAI's roadmap toward Artificial General Intelligence (AGI), are:

1. **Chatbots: Conversational**
2. Reasoners: Human-level problem solving
3. Agents: Systems that can take action
4. Innovators: Can aid in invention
5. Organizations: Can do the work of an organization

# Changing Roles & Required Skills



- 64% of marketers fear that AI might replace their jobs in the next five years
- 63% say they spend time on tasks that *could be automated.*

[PR Newswire](#)

# Changing Roles & Required Skills



62% of marketers say their employer doesn't provide training on AI/prompt engineering.

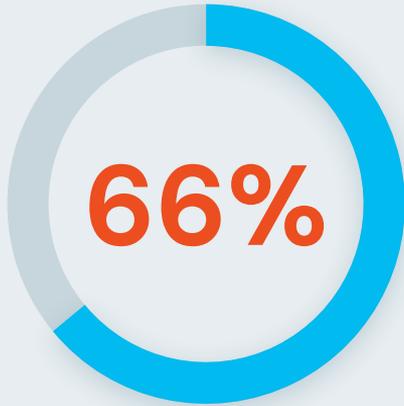
[Future of Marketing Institute - FMI](#)

# Changing Roles & Required Skills

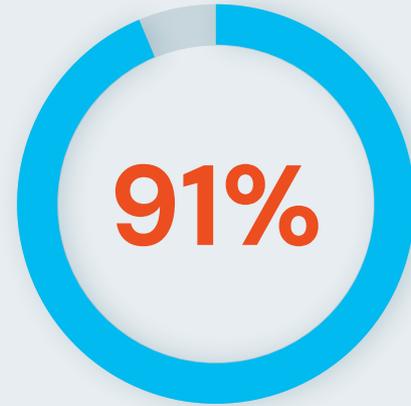


- 20–30% of marketing roles will undergo major change (in tasks/responsibilities) in the next two years
- 5–15% may be eliminated or heavily reduced in scope in that same time span

# AI - In B2B Marketing Today



of marketers globally say they're already using AI in their roles.



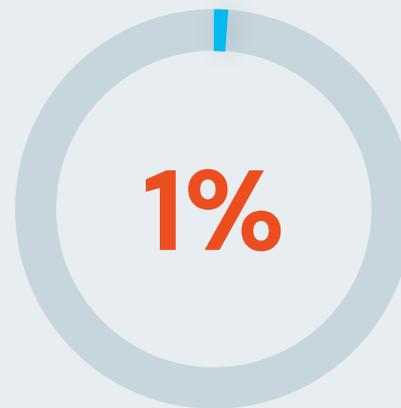
of marketing leaders report that their teams use AI to assist in daily work.

Source: HubSpot's State of AI in 2025 report

# AI - In B2B Marketing Today



of companies, across all industries, plan to increase their AI investment over the next three years.



believe they've reached true AI maturity – where AI is fully integrated into their processes and workflows.

*Source: McKinsey & Company*

# How to Safely Invest in AI for Team Success

Strategies | People | Systems | Software



**Strategies:** SMART Goals | Roadmaps

**People:** Inspire | Train | Empower

**Systems:** Workflows | Knowledge Sharing | Reporting

**Software:** Experiment | Approval | KISS

# Great 8 Pillars of ROI Driven Marketing



The **Great 8 Pillars™** is built on more than 100 proven marketing benchmarks and best practices.

It helps B2B companies align their **Strategy, People, Systems, and Software** to create scalable, measurable, and predictable growth.

That same structure also provides a clear path for bringing AI into your marketing operation in a consistent, practical way.





# Strategies

# Define “SMART” Departmental AI Objectives



- **Define 1–3 primary objectives. Be specific.**

***SMART = Specific, Measurable, Achievable, Relevant, Time-Bound***

- Eliminate redundant tasks
- Increase productivity
- Enhance speed of delivery
- Enhance quality of delivery
- Reduce workforce
- Maximize creativity
- Develop custom agents for market differentiation
- Automate reporting & analytics
- Other?

# Example of “SMART” Departmental AI Objectives



## Mission #1:

- Identify key workflows and redundant tasks across the marketing department. Integrate AI for enhanced productivity, speed to market, and quality.

## Our goals in leveraging AI are to:

- Increase productivity by 25% department-wide
- Enhance our speed of delivery by 30%
- Reduce quality issues by 15%

**We will accomplish our mission by January 31, 2026.**

# Actionable Takeaway:

Pick one task on your team that's repetitive, time-consuming, or draining, and figure out how AI might make it faster or easier.

Try one tool, test one prompt, and share what you learned at your next team meeting.

# Define “SMART” AI Objectives by Role



**Everyone on your team should have AI objectives!**

- Writers
- Graphic Designers / UX
- Social Media
- SEO
- Managers
- Strategists
- Project Managers
- Paid media / advertising
- Video / Photography
- *Other*

# Example of “SMART” Departmental AI Objectives



## **The Writer’s Mission:**

- To increase editorial output while maintaining or enhancing quality while allowing more time for content strategy.

## **Writer goals in leveraging AI are to:**

- Increase content output by 25% per writer
- Reduce outsourced vendor costs by 50%
- Increase quality of content as evidenced by enhanced conversion rates and leads

**We will accomplish our mission by January 31, 2026.**

## Quick Tip.

# Think Multimodal.

What are the primary forms of deliverables you are looking to leverage AI for?

1. Text
2. Image
3. Video
4. Audio
5. Combination?

**Tip:** Choose one or two modes to experiment with and develop SMART goals for these.

# Example 90-Day Roadmap



## Week 1

- Develop AI Playbook
  - Define department objectives
  - Define role objectives
  - Define mode objectives
  - Build the rollout plan
  - Assign roles: AI Champion / Executive Sponsor

## Week 2

- Hype meeting: Get your team onboard.
  - Everyone understands *why* AI matters and what success looks like.

## Week 3-5

- Training & Experiment
  - Prompt Training 101
  - Experiment with proven tools / software
  - Role specific use cases and feedback
  - Share wins and document successes

## Week 6-12

- Add AI steps into marketing SOPs (e.g., content → AI draft → human edit → publish).
- Create governance checklist (accuracy, tone, compliance).
- Recognize an “AI Innovator of the Month.”
- Measurement & KPIs

# Key Takeaway:

A solid AI strategy provides direction and keeps you on task. It keeps adoption tied to results, helps you spot what's working, and gives you permission to pivot when something isn't.



# People

# Key Takeaway:

The skillset of your team is changing.

If your team doesn't pick up prompt-engineering, AI literacy, workflow redesign, they risk obsolescence or being relegated to lower-value tasks.

# AI + Human = Enhanced Productivity & Advancement



**Many marketers are fearful and confused about AI.**

When people understand how to use AI, AI adds value — and where human judgment still matters — they work smarter, not just faster.



**Chris Peer**  
CEO SyncShow

“Most people don’t like change. It’s your job to **INSPIRE** your team.”

# Train Your Team



- Run internal workshops on best practices, effective prompting, and AI ethics.
- Encourage hands-on practice with a focus on real campaigns, not abstract experiments.
- Provide examples of successful AI outputs and poor outputs to illustrate the differences.
- Celebrate wins and reward those who excel.

**Tip:** Start with short sprints within your 90 day plan—one campaign or project per AI tool—to learn without disrupting broader operations.

**Geoff Woods**

Founder | AI Leadership |  
Author

“Your competitive advantage is not knowing everything about AI; it’s about asking the right questions and being curious.”

[The AI Driven Leader](#)

# Leading People Through AI Adoption



→ *Lead by example.*

→ *Pilot role-specific ideas.*

→ *Encourage experimentation & failure.*

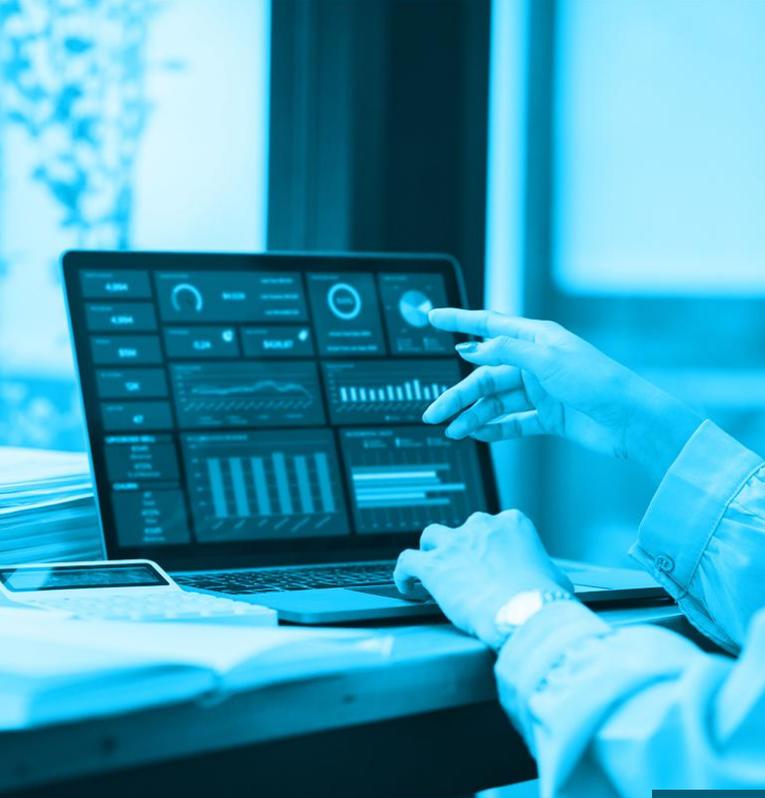
→ *Reflect together.*

# Actionable Takeaway:

Train your team!

<https://www.marketingaiinstitute.com/>

AI can do much more than craft emails and enhance messaging.



# Systems



**1**

**Integrate.**

**2**

**Document.**

**3**

**Quality &  
Measurement.**



- Integrate AI into existing workflows
- Document how AI is to be used for specific tasks. Include prompt templates, file naming conventions, and review processes.
- Define quality standards and review checkpoints (e.g., human editing required for content).

**Why this matters:** Without SOPs, experimentation becomes chaotic and siloed, wasting time and producing inconsistent standards.

# Actionable Takeaway:

Choose one AI use-case your team has tested, and turn it into a simple repeatable process. Document what worked, create a quick-start template or prompt, and save it in a shared location. This will become your first building block toward scalable AI adoption.



# Software

# Choose The Right Tools



## Categories & Example Uses:

Category	AI Use	Example Tools
Content Generation	Blog posts, emails, social media	ChatGPT, Jasper, Copy.ai
Analytics & Insights	Customer segmentation, trend detection	Crayon, HubSpot AI, Tableau AI
Design & Creative	Ad creatives, visuals, videos	Canva AI, DALL-E, Runway
Automation	Workflow automation, CRM tasks	Zapier AI, HubSpot Workflows, Salesforce Einstein
SEO & Performance	Keyword research, content optimization	Surfer SEO, Frase, Semrush AI

**Tip:** Pick 1–2 tools per goal to start, rather than introducing a dozen tools at once.

# Actionable Takeaway:

Audit your current stack.

- List the AI features already available in your existing platforms and tools.
- As your team explores AI, assess how current tools and features align with your adoption strategy.
- Identify one integration or feature you can activate within your existing toolset before experimenting with new tools.

# Bringing It All Together



- Start by helping your team get comfortable using AI in small, practical ways.
- Document what works and build simple playbooks around it.
- Use your current tech stack as the foundation and explore new AI tools when they clearly extend or strengthen what's already working.

# Practical Examples

GPTs & C.R.I.T.

# Developing a Custom GPT (Generative Pre-Trained Transformer)



## Create a Knowledge Base (the model's "brain")

This is where most companies fail — they feed the model generic info instead of curated brand intelligence.

### Include:

- Brand & Positioning Documents: Mission, purpose, voice/tone, target markets, differentiators.
- Product/Service Sheets: Detailed descriptions, benefits, customer pain points solved.
- Service Frameworks: methodologies, processes.
- Customer Personas & Case Studies: How you deliver value, real examples.
- Competitor Profiles: Positioning statements, tone, and messaging examples (for contrast).
- Best Content Samples: Your top-performing blogs, emails, case studies — model what "great" looks like.

# Developing a Custom GPT (Generative Pre-trained Transformer)



## Give Your GPT Instructions:

“You are SyncShow’s Marketing Strategist GPT. You write with authority in B2B industrial marketing, reflecting SyncShow’s Great 8 Pillars™. Your job is to create content that differentiates SyncShow from generic agencies by focusing on measurable ROI, sales enablement, and strategic marketing alignment.”

**Also provide instructions on what the GPT is not. Add parameters.**

# GPT Key Takeaways



1. Feed final published and high-performing content back into the GPT to improve future outputs.
2. Use ChatGPT Teams or Enterprise: For secure internal use.
3. Connect GPT to HubSpot, Google Drive, or project management tools.
4. Tag each document with metadata (e.g., “Voice/Tone,” “Case Study,” “Differentiator”) so the model can contextually understand and recall information more accurately.
5. Set up multiple GPTs and connect them (Brand Voice, SEO, Products & Services)

# C.R.I.T Framework



**Context:** Provide AI the context of the problem

**Role:** Inform AI of its role in solving the problem

**Interview:** Assign AI to interview you to help identify the true problem.

**Task:** Assign AI with the task to complete.

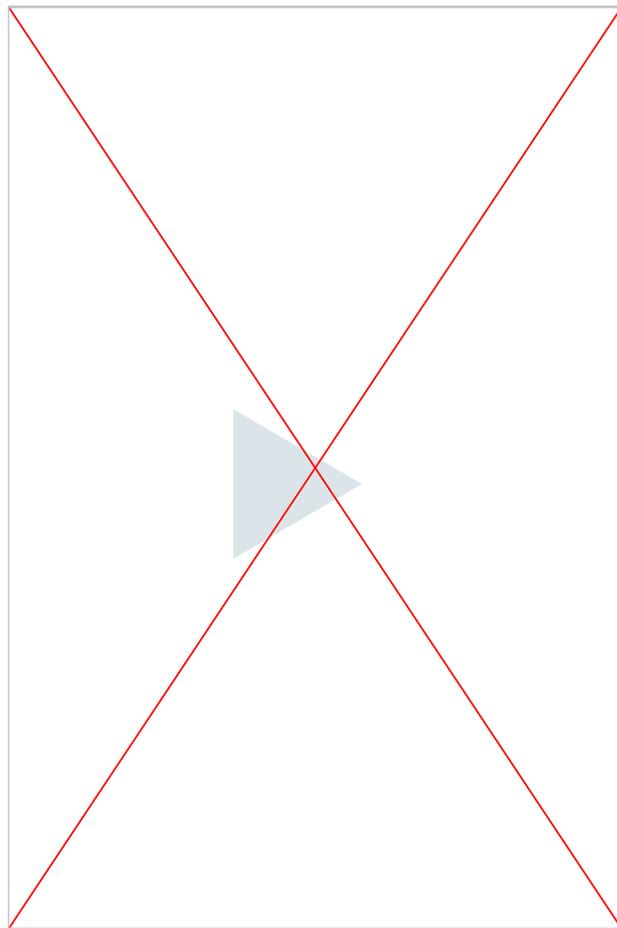
# C.R.I.T. Framework in Action



The screenshot shows a ChatGPT chat window. At the top left, it says "ChatGPT" with a dropdown arrow. At the top right, there is a "Share" button and a three-dot menu. The main content area contains a text response from the AI, which is partially obscured by a large black video player overlay. The text visible includes: "#context# I run the marketing program for a global third party logistics company that provides strategic services to companies that are looking to improve freight and logistics solutions. We have a strong presence in the United States and are looking to scale in new markets, specifically to middle market ecommerce companies. We offer a competitive advantage due to our global reach, breadth of services and a 'one shop' approach. I am looking to increase sales to middle market companies in this market to our solution." Below this, another line of text says "#Interview# Ask me up to three questions, one at a time, to learn more about my situation, so that I can verify more specifically what my problem is." The video player overlay has a white play button in the center and a "Play Video" tooltip. At the bottom of the chat window, there is a text input field with a plus sign and the text "Ask anything". To the right of the input field are icons for voice search, a microphone, and a video player control bar showing a play button, a progress bar, and a timestamp of "00:00". At the very bottom of the chat window, there is a small disclaimer: "ChatGPT can make mistakes. Check important info."

# How SyncShow Uses AI

*This video was edited using AI!*



# Thank You!

Questions?

Connect with me:



# Artificial Intelligence

Guidance for the (Legally Compliant) Deployment of AI Tools

Kris Chandler

Benesch, Friedlander, Coplan & Aronoff



# What Is AI?

- **Fundamental AI Definition** - Artificial Intelligence (AI) refers to the simulation of human intelligence in machines that are programmed to think, learn, and solve problems.
  - Key Tasks: Recognize Speech, Understanding Language, Make Decisions, and Analyze Data
- **Key Terms:**
  - *Machine Learning*
  - *Natural Language Processing*
  - *Large Language Models*



# Current Regulatory Approach for AI

- **Federal:** No current omnibus federal regulation on AI.
  - Some federal agencies have clarified that existing statutes and regulations apply to business operations regardless as to a business' use of AI tools. This means if a law applies to your business, use of an AI tool will not alleviate your compliance obligations under that law.
- **State:**
  - Risk Based Approach - Colorado
  - Transparency Obligations - Utah
  - Several states have laws around automated decision making (California, Illinois, New York, Maryland)
  - A number of states of active bills governing AI that are working through the legislature (California, Oklahoma, Virginia, Connecticut)
- **International:**
  - EU AI Act



# AI Governance – Best Practices

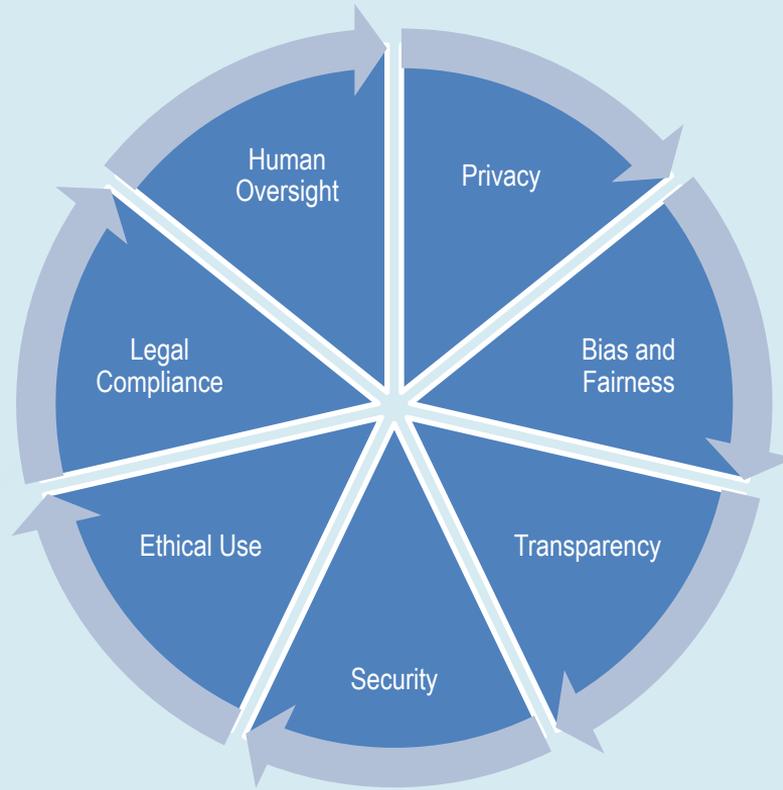
Consider AI  
Use Case

Improve  
Upon  
Current  
Technology  
Governance  
Policies

AI  
Governance  
Body

Understand  
How  
Current and  
New  
Legislation  
Impacts AI

# AI Governance – Risk to Consider and Address



# Contracting Tips and Tricks

## Important Contract Provisions:

- Data Privacy and Security
- Intellectual Property Rights and Ownership
- Liability and Indemnification
- Transparency and Explainability
- Performance Standards
- Ethical use and Compliance
- Termination and Exit Strategies

## Areas to Look Out For in Vendor Agreements

- Data Use Rights
- Security
- Model Changes
- Training
- Confidentiality



# Questions?

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