THE AI-READY MARKETING STRATEGY KIT

Templates & Frameworks for Measurable Success

TRUST INSIGHTS

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Introduction: From AI Overwhelm to Actionable Strategy with Proven Frameworks

Artificial intelligence in marketing is no longer an emerging trend—it's a strategic imperative. Companies everywhere face immense pressure to harness AI, yet many marketing leaders struggle to turn its potential into practical results. In fact, recent industry research reveals that 75% of marketing teams operate without a clear AI roadmap or strategy. This creates a significant gap between AI's technological promise and its real-world application.

This disconnect isn't just about lacking the right tools. It stems from fundamental organizational challenges that block effective AI implementation. According to the 2025 State of Marketing AI Report, 62% of marketing professionals say a lack of structured education and training is their primary barrier to AI adoption. Another 52% point to organizational knowledge gaps as a critical obstacle. Without a systematic approach to AI strategy, even well-resourced marketing departments find it hard to transform AI's theoretical capabilities into measurable business outcomes.

The AI-Ready Marketing Strategy Kit directly addresses these issues. It provides a comprehensive, structured approach to AI implementation that turns abstract potential into concrete strategic assets for your business. By using Trust Insights' proven frameworks—TRIPS, 5P, STEM, and 6Cs—this kit delivers an end-to-end system. You'll be equipped to identify high-impact AI opportunities, assess your organization's readiness, develop clear implementation roadmaps, and measure performance effectively.

Unlike generalized AI guidance that offers theory without practical steps, this kit provides actionable templates, worksheets, and decision-making frameworks designed specifically for marketing functions. Each component is built on established strategic methodologies, validated across diverse organizations, ensuring it’s relevant to your industry and current stage of AI maturity.

Section 1: Identifying Prime AI Opportunities & Defining Your "Purpose"

Part 1.0: The TRIPS AI Use Case Identifier

Strategic AI implementation begins with systematic opportunity identification. Rather than pursuing artificial intelligence as a generic technological initiative, successful organizations pinpoint specific use cases where AI can deliver maximum value with minimal disruption. The Trust Insights TRIPS Framework provides a structured methodology for evaluating potential AI applications across five dimensions, enabling objective prioritization based on organizational impact and implementation feasibility.

Each dimension of the **TRIPS framework** addresses a critical evaluation factor:

- **Time:** Quantifies the current resource investment associated with a particular marketing function. Tasks that consume significant staff hours represent prime candidates for AI optimization, as automation of these functions can yield substantial efficiency gains and resource reallocation opportunities. The evaluation considers both the absolute time investment and the opportunity cost of that investment.

- **Repetition:** Assesses the degree of standardization and cyclical recurrence within a task. Highly repetitive functions with established patterns and predictable workflows can be systematically optimized through AI automation, often delivering immediate productivity benefits with minimal implementation complexity. This dimension examines both frequency and procedural consistency.

- **Importance**: Evaluates the strategic significance and risk profile associated with the task. This multi-faceted assessment considers both the potential upside of optimization and the downside risk of implementation failure. Lower-risk, high-importance tasks offer excellent starting points for AI implementation, while high-risk functions typically require phased approaches with substantial human oversight and governance mechanisms.

- **Pain:** Recognizes the human element in workflow optimization by measuring team satisfaction associated with specific tasks. AI presents a strategic opportunity to automate low-satisfaction, high-friction activities, simultaneously improving team morale and redirecting human talent toward higher-value, more engaging work. This dimension acknowledges that employee experience directly impacts operational performance.

- **Sufficient Data**: Examines the foundational information required for effective AI implementation. Tasks with robust data availability, standardized information architecture, and comprehensive historical examples provide stronger foundations for successful AI deployment. This dimension evaluates both quantitative aspects (volume of

data) and qualitative factors (data quality, standardization, and accessibility).

TRIPS Scoring Worksheet Template:

This structured assessment tool enables objective evaluation of potential AI use cases across all five TRIPS dimensions, facilitating evidence-based prioritization and resource allocation.

Task Description	Time Score (1-5)	Repetition Score (1-5)	Importance Score (1-5)	Pain Score (1-5)	Sufficient Data Score (1-5)	Total Score
[Task 1]						
[Task 2]						
[Task 3]						

Scoring guide: For Time and Repetition, higher scores (5) indicate greater time consumption and repetitiveness—making these tasks better candidates for AI. For Importance, lower scores indicate lower risk, suggesting more suitable initial AI applications. For Pain, lower scores indicate less enjoyable tasks that are prime for automation. For Sufficient Data, higher scores indicate better data availability, supporting more effective AI implementation.

Implementation Guidance: Begin by documenting all recurring marketing tasks and processes within your organization. Involve multiple stakeholders in the scoring process to ensure diverse perspectives. Prioritize high-scoring tasks for initial AI pilots, while developing phased approaches for more complex use cases. Use the AI Suitability Notes column to document specific considerations, potential challenges, and preliminary implementation approaches.

Part 1.1: The AI Marketing Goal Alignment Worksheet

Strategic AI implementation must extend beyond technological capability to address specific business objectives. This alignment worksheet bridges the gap between opportunity identification and organizational impact, ensuring that AI initiatives drive meaningful outcomes rather than pursuing technology for its own sake. By connecting TRIPS analysis with strategic business priorities, this framework establishes a clear purpose for each AI initiative.

The Goal Alignment Worksheet systematically connects technical capabilities with business requirements through a structured evaluation process:

Strategic Alignment Template:

1. Key Business Objective(s) (1-3):
    - Identify the primary organizational priorities that your marketing function must address
    - Example: Increase qualified lead generation by 25% in Q3 while maintaining current cost-per-acquisition
    - Example: Reduce customer acquisition costs by 15% while maintaining conversion quality
    - Example: Improve customer retention rates by 10% through enhanced personalization and engagement
2. Specific Marketing Challenges Blocking This Objective:
    - Document the precise operational obstacles preventing achievement of these objectives
    - Incorporate insights from TRIPS analysis to identify capability gaps and procedural inefficiencies
    - Example: Manual lead scoring processes create bottlenecks and inconsistent evaluation
    - Example: Limited capacity for content personalization reduces engagement effectiveness
3. Selected AI Initiative:
    - Identify the specific AI application that addresses these challenges, based on TRIPS prioritization
    - Define the scope, boundaries, and specific functionality of the proposed solution
    - Example: Implement predictive lead scoring model using historical conversion data
    - Example: Deploy natural language generation platform for personalized email communication
4. AI Initiative's Purpose:
    - Articulate exactly how the AI solution will address identified challenges
    - Document both the direct operational impact and the broader business contribution
    - Example: Automate lead qualification to increase processing capacity by 200% while improving scoring consistency
    - Example: Scale personalized content creation to support segment-specific messaging across customer journey
5. Key Performance Indicators (KPIs) for AI Initiative:

- Establish specific, measurable success metrics for the AI implementation
- Include both implementation metrics (adoption, usage) and outcome metrics (business results)
- Define measurement methodology, data sources, and evaluation frequency
- Example: Increase lead processing volume by 3x within 60 days of implementation
- Example: Improve lead-to-opportunity conversion rate by 15% within 90 days

6. How This AI Initiative Supports the Business Objective:

    - Explicitly connect the AI implementation to organizational priorities
    - Document the causal relationship between AI capabilities and business outcomes
    - Quantify projected contribution to strategic objectives where possible
    - Example: Automated lead scoring will increase sales pipeline velocity, directly supporting the 25% lead generation increase objective
    - Example: Personalized content generation will improve engagement metrics and conversion rates, directly contributing to retention goals

Implementation Guidance: Develop this alignment document in collaboration with both marketing and business leadership to ensure shared understanding and commitment. Review and refine these alignments quarterly to maintain relevance as business priorities evolve. Use this document as the foundation for stakeholder communications, ensuring consistent understanding of the AI initiative's strategic purpose and expected outcomes.

Part 1.2: The Basic AI ROI Projection Calculator

Securing organizational commitment for AI initiatives requires translating strategic value into financial impact. This ROI projection framework provides a structured methodology for quantifying the expected returns from AI investments, enabling data-driven decision-making and budget justification. By connecting operational improvements to financial outcomes, this calculator bridges technical capabilities and business value.

The calculator employs a comprehensive approach to ROI assessment, incorporating both direct cost savings and indirect value creation:

ROI Calculator Template:

1. AI Initiative Name: [From TRIPS + Goal Alignment process]

    - Use consistent naming conventions to ensure alignment with other planning documents
    - Specify initiative scope and boundaries to enable accurate value assessment

2. Current Process Metrics:

    - Hours spent per [week/month/quarter]: ___

    - Average hourly cost (fully loaded with benefits): $___
    - Total current process cost: $___
    - Current process output volume: ___
    - Current error rate/quality metrics: ___
3. Projected AI-Enhanced Process Metrics:
    - Estimated hours saved per [week/month/quarter]: ___
    - Percentage efficiency improvement: ___%
    - Projected cost after AI implementation: $___
    - Projected process output volume: ___
    - Projected error rate/quality improvement: ___
4. Value of Recovered Time:
    - Tasks that will be prioritized with recovered time: ___
    - Estimated value of new priorities: $___
    - Strategic importance of reallocated resources (1-5): ___
    - Projected impact on team capabilities and capacity: ___
5. Implementation Costs:
    - Technology investment (licensing/subscription): $___
    - Implementation services and customization: $___
    - Training/onboarding: $___
    - Ongoing maintenance and optimization: $___
    - Total implementation cost: $___
    - Expected useful life of solution: ___ years
6. Projected ROI:
    - Annual value (cost savings + value of recovered time): $___
    - Total value over expected useful life: $___
    - Net benefit (total value - implementation costs): $___
    - ROI percentage: ___%
    - Projected payback period: ___ months
    - Additional non-quantifiable benefits: ___

Implementation Guidance: Develop conservative estimates for all projections to ensure credibility. Incorporate both direct financial metrics and indirect benefits such as improved quality, reduced risk, and enhanced capabilities. Review historical data where available to establish realistic baselines. Consider performing sensitivity analysis to understand how ROI varies under different assumptions. Use this calculator as a living document, updating projections as actual implementation data becomes available.

Section 2: Assessing Your AI Readiness

Part 2.1: The AI Marketing Readiness Self-Assessment Checklist

Before committing resources to AI implementation, organizations must objectively evaluate their current capabilities and identify potential gaps that could impact success. This comprehensive readiness assessment provides a structured methodology for evaluating organizational preparedness across the Trust Insights 5P Framework (Purpose, People, Process, Platform) and 6Cs of Data Quality. This multidimensional evaluation ensures that all critical success factors are addressed in implementation planning.

The assessment examines readiness across fifteen critical dimensions:

Self-Assessment Categories:

Purpose Clarity (Rate 1-5)

- Is the Purpose for chosen AI initiatives clear, specific, and well-communicated throughout the organization?
- Have detailed objectives, success metrics, and evaluation methodologies been defined and documented?
- Does the AI initiative explicitly align with broader organizational strategy and business priorities?
- Is there consensus among stakeholders regarding initiative scope, boundaries, and expected outcomes?
- Has leadership articulated how this initiative connects to long-term organizational vision and direction?

People - Team AI Literacy & Skills (Rate 1-5)

- Does your marketing team possess the necessary knowledge and capabilities to effectively leverage AI solutions?
- Have skill gaps been identified and documented through formal assessment processes?
- Is there a structured educational program to develop required AI competencies?
- Are there team members with prior AI implementation experience who can guide the process?
- Does the organization have access to specialized expertise (internal or external) for complex requirements?

People - Leadership & Stakeholder Buy-in (Rate 1-5)

- Is there visible, active executive sponsorship for AI initiatives within marketing?

- Have key stakeholders across departments been identified and engaged in the planning process?
- Do business leaders understand both the potential benefits and limitations of proposed AI applications?
- Is there sustained commitment to resource allocation throughout the implementation lifecycle?
- Have potential organizational impacts been communicated transparently to all affected groups?

People - Change Management Readiness (Rate 1-5)

- Is your organizational culture receptive to workflow changes and new technological approaches?
- Are there established change management methodologies and resources within the organization?
- Has potential resistance been proactively identified and addressed through engagement strategies?
- Are there clear communication channels to share implementation progress and outcomes?
- Have early adopters and internal champions been identified to support adoption and engagement?

Process - Existing Workflow Efficiency (Rate 1-5)

- Are current processes well-defined, documented, and understood by all stakeholders?
- Have process bottlenecks and inefficiencies been identified through formal analysis?
- Is there a clear understanding of how AI will integrate with and enhance existing workflows?
- Have process owners been engaged in redesigning workflows to incorporate AI capabilities?
- Is there a mechanism for continuous process optimization based on implementation learnings?

Process - AI Governance & Ethical Guidelines (Rate 1-5)

- Does your organization have established governance structures for AI implementation and usage?
- Are there documented ethical guidelines and principles governing AI application?
- Have potential risks and mitigation strategies been identified for each AI initiative?
- Is there a defined process for addressing unexpected outcomes or ethical concerns?
- Are compliance requirements (regulatory, legal, industry-specific) incorporated into governance structures?

Process - Integration Planning (Rate 1-5)

- Is there a detailed implementation roadmap with clear milestones and deliverables?
- Has process integration been mapped at a detailed level, identifying touchpoints and dependencies?
- Are there defined testing protocols to validate integration effectiveness?
- Have rollout strategies been developed to minimize operational disruption?
- Is there a clearly defined transition plan from current to future state operations?

Platform - Current Martech Stack & Integration Capability (Rate 1-5)

- Have current technology systems been assessed for AI compatibility and integration requirements?
- Are APIs and data exchange mechanisms available for relevant systems?
- Is the existing technology environment sufficiently flexible to accommodate new AI solutions?
- Have integration limitations been identified and addressed in implementation planning?
- Is the current martech architecture documented and understood by the implementation team?

Platform - Technical Expertise & Support (Rate 1-5)

- Is there sufficient technical knowledge to effectively implement and manage AI solutions?
- Are IT/technical resources allocated and committed to supporting the AI initiative?
- Have technical requirements been clearly defined and validated with internal experts?
- Is there a support structure to address technical issues during and after implementation?
- Has the organization established relationships with external technical resources if needed?

Platform - Infrastructure Readiness (Rate 1-5)

- Does your current technology environment provide the necessary infrastructure for AI solutions?
- Have computing, storage, and processing capabilities been assessed against requirements?
- Is the security environment sufficient to protect sensitive data used in AI applications?
- Have necessary infrastructure upgrades been identified and incorporated into implementation planning?
- Is infrastructure scalable to accommodate growth in AI usage and application?

Data Foundation - Clean (Rate 1-5)

- Is your marketing data free from significant errors, duplications, and inconsistencies?
- Are there established data quality monitoring and remediation processes?

- Have data cleansing requirements been identified for specific AI applications?
- Is there a clear understanding of acceptable data quality thresholds for each initiative?
- Are there automated processes for ongoing data quality maintenance?

Data Foundation - Complete (Rate 1-5)

- Do your data sets contain all necessary fields and attributes required for AI functionality?
- Have data gaps been identified through formal assessment processes?
- Is there a strategy to address missing data elements through collection or alternative sources?
- Are data completeness requirements documented for each AI application?
- Is there a process to validate data completeness before implementation?

Data Foundation - Comprehensive (Rate 1-5)

- Does your data encompass the full scope of information needed for effective AI implementation?
- Is historical data available in sufficient volume to support model training and validation?
- Does your data cover all relevant customer segments, products, and business scenarios?
- Have limitations in data comprehensiveness been identified and addressed in planning?
- Is there a strategy to expand data scope where needed for specific applications?

Data Foundation - Chosen (Rate 1-5)

- Has relevant data been properly identified and selected for each AI application?
- Is there a process to filter extraneous information that could impact AI effectiveness?
- Are data relevance criteria clearly defined and documented?
- Have domain experts validated data selection decisions?
- Is there a mechanism to refine data selection based on initial implementation results?

Data Foundation - Credible (Rate 1-5)

- Are your data sources reliable, authoritative, and trusted within the organization?
- Have data provenance and lineage been documented for key data assets?
- Is there a process to validate data accuracy and reliability?
- Are there established standards for data source evaluation and selection?
- Have potential data biases been identified and addressed?

Data Foundation - Calculable (Rate 1-5)

- Is your data structured in formats usable for AI analysis and processing?
- Are data normalization and standardization processes in place?
- Have data transformation requirements been identified for specific AI applications?
- Are there established data modeling practices appropriate for AI implementation?

- Is data accessible through appropriate query and extraction mechanisms?

Scoring Interpretation: Scores below 3 in any category indicate areas requiring focused attention before proceeding with implementation. Categories scoring 3-4 represent areas for ongoing improvement. Categories scoring 5 indicate organizational strengths that can support successful AI adoption.

Implementation Guidance: Conduct this assessment with a diverse group of stakeholders to ensure a comprehensive perspective. Prioritize addressing critical gaps (scores of 1-2) before proceeding with implementation. Develop specific action plans for each identified gap, assigning clear ownership and timelines. Reassess periodically throughout the implementation process to track progress and identify emerging challenges. Use assessment results to inform resource allocation and risk management strategies.

Section 3: Charting Your AI Course

Part 3.1: The 12-Month AI Marketing Roadmap Template

Successfully implementing AI within marketing requires a structured, comprehensive planning approach that addresses all dimensions of the transformation journey. This roadmap template provides a systematic framework for sequencing initiatives, allocating resources, and establishing accountability, ensuring that AI adoption progresses in a coordinated, strategic manner. By incorporating elements from both the 5P Framework (Purpose, People, Process, Platform, Performance) and the STEM methodology (Strategy, Tactics, Execution, Measurement), this roadmap connects strategic vision with tactical implementation.

The roadmap template facilitates detailed planning across multiple dimensions:

Roadmap Template Structure:

Quarter	Focus Area/ Theme	Specific AI Initiative	Purpose	People	Process	Platform	Performance Metrics	Timeline & Budget	Dependencies
Q1									
Q2									
Q3									
Q4									

Detailed Element Descriptions:

- **Focus Area/Theme**: Define the strategic priority for each quarter, establishing a unifying concept that connects individual initiatives to broader organizational objectives. Examples include "Data Foundation Optimization," "Customer Journey Enhancement," "Campaign Automation Excellence," or "Predictive Analytics Implementation."

- **Specific AI Initiative:** Identify the discrete projects selected through TRIPS analysis and strategic alignment. Each initiative should have clear boundaries, specific objectives, and defined ownership. Examples include "Predictive Lead Scoring Implementation," "Automated Content Personalization," or "Customer Churn Prediction Model."

- **Purpose**: Articulate the specific business objectives addressed by each initiative, connecting AI capabilities to organizational priorities. This column should reference the goals established in the AI Marketing Goal Alignment Worksheet, ensuring consistency between planning documents. The Purpose statement should be specific, measurable, and directly linked to strategic business outcomes.

- **People**: Document the human resources required for successful implementation, including roles, responsibilities, skills, and training requirements. This section should identify initiative sponsors, project owners, technical resources, and affected stakeholders. Include specific capability development needs and knowledge transfer requirements to ensure sustainable implementation.

- **Process**: Define workflow changes, operational adjustments, and governance considerations associated with each initiative. This section should document current-state processes, future-state designs, transition approaches, and change management strategies. Include specific procedural modifications, approval workflows, and operational protocols necessary for effective AI integration.

- **Platform:** Specify technology requirements, integration needs, and infrastructure considerations for each initiative. This section should identify specific AI solutions, required capabilities, integration touchpoints with existing systems, data flows, and technical dependencies. Include vendor selection criteria, implementation approaches, and technical specifications.

- **Performance Metrics**: Establish specific KPIs for measuring implementation success and business impact. This section should define both leading indicators (adoption, usage, technical performance) and lagging indicators (business outcomes, ROI, customer impact). Include measurement methodologies, data sources, reporting cadence, and evaluation criteria.

- **Timeline & Budget:** Document resource allocation, milestone scheduling, and financial requirements. This section should include implementation phases, key deliverables, critical path elements, budget categories, and funding sources. Specify both capital and operational expenditures, along with timing considerations for resource allocation.

- **Dependencies**: Identify prerequisites, constraints, and interconnections between initiatives. This section should highlight sequential requirements, resource conflicts, external dependencies, and risk factors that could impact implementation. Include contingency planning considerations and alternative approaches where appropriate.

Implementation Guidance: Develop this roadmap as a collaborative exercise involving marketing leadership, technical stakeholders, and business executives. Begin with high-priority initiatives identified through TRIPS analysis, sequencing them based on organizational readiness and strategic impact. Establish a quarterly review process to assess progress, adjust priorities, and incorporate learnings into ongoing planning. Use this roadmap as a living document, updating regularly as implementation progresses and new opportunities emerge.

Section 4: Smart AI Tooling – Selection & Implementation

Part 4.1: "Top Questions for AI Marketing Vendors" Cheatsheet

Selecting the right AI solutions requires systematic evaluation across multiple dimensions to ensure alignment with organizational requirements, technical compatibility, and business objectives. This comprehensive framework provides structured evaluation criteria that align with the 5P methodology, enabling informed technology decisions that extend beyond feature comparison to address implementation practicalities and long-term success factors.

The framework organizes vendor assessment across five critical dimensions:

Key Vendor Evaluation Questions:

Platform Integration & Technical Compatibility

- How does your solution integrate with our existing martech stack components (e.g., Salesforce, HubSpot, Adobe Experience Cloud)?
- What specific APIs and connectors are available for seamless data exchange with our current systems?
- What technical requirements must our environment meet to successfully implement your solution?
- How does your platform handle data migration from our existing systems?
- What is your typical implementation timeline and process for organizations of our size and complexity?
- How does your architecture support customization to address our specific requirements?
- What technical resources are required from our organization during implementation and ongoing operation?

Data Security, Privacy & Governance

- How is our proprietary marketing and customer data handled, stored, and protected within your system?
- What specific security certifications and compliance standards does your platform maintain (SOC 2, GDPR, CCPA, etc.)?
- How do you ensure data privacy and prevent unauthorized access to sensitive information?
- What data ownership policies govern information processed through your platform?
- How are data retention and deletion policies managed within your solution?
- What governance controls are available to manage system access and permissions?
- How does your platform support audit requirements and compliance documentation?
- What processes are in place to address potential data breaches or security incidents?

Support, Training & Knowledge Transfer

- What specific onboarding and training resources are provided during implementation?
- How do you support knowledge transfer to ensure our team can effectively leverage your solution?
- What ongoing education is available as your platform evolves and new capabilities are released?
- What support tiers and service level agreements are available for issue resolution?
- How is customer feedback incorporated into product development and improvement?
- What professional services are available for implementation support and optimization?
- How does your team collaborate with our internal resources during implementation?
- What user community resources exist for knowledge sharing and best practice exchange?

Scalability, Evolution & Future-Proofing

- How does your platform handle increasing data volumes, user bases, and processing requirements?
- What is your product roadmap for the next 12-24 months, and how are customer needs incorporated?
- How frequently are updates and new features released, and what is the implementation process?
- How do you incorporate emerging AI technologies and methodologies into your platform?
- What is your approach to backward compatibility as your platform evolves?
- How does your solution address changing regulatory requirements and industry standards?
- What is your company's financial stability and market position within the AI landscape?
- How do you benchmark your capabilities against competing solutions in the marketplace?

ROI, Performance Validation & Success Metrics

- Can you provide detailed case studies from organizations similar to ours in size, industry, and use case?
- What specific performance metrics and outcomes have comparable clients achieved with your solution?
- How do you measure and report on performance, usage, and business impact?
- What is your typical customer ROI timeline, and what factors influence payback periods?
- How do you support customers in quantifying and communicating the value of your solution?
- What implementation challenges have other customers encountered, and how were they addressed?
- What success metrics do you recommend for our specific use case and objectives?
- How do you support continuous optimization to improve performance over time?

Implementation Guidance: Use this framework to develop a structured vendor evaluation process that aligns with your specific requirements and priorities. Customize questions based on your particular use cases, technical environment, and organizational considerations. Involve diverse stakeholders in the evaluation process, including technical, operational, and business perspectives. Document vendor responses systematically to enable objective comparison and evidence-based decision-making. Consider conducting proof-of-concept evaluations for high-priority vendors to validate capabilities and compatibility.

Part 4.2: "Integrating AI into Your Martech Stack" Implementation Checklist

Successful AI implementation requires systematic planning that addresses all dimensions of organizational readiness, technical integration, and operational adaptation. This comprehensive checklist ensures that implementation planning incorporates all elements of the 5P framework, providing a structured methodology for managing the complex interdependencies involved in AI adoption. By addressing these critical success factors proactively, organizations can significantly reduce implementation risk and accelerate time-to-value.

The checklist is organized around the 5P Framework elements, providing a holistic approach to implementation planning:

5P Integration Checklist:

Purpose

- [ ] Clear use case defined with specific objectives and success criteria
- [ ] Strategic alignment confirmed with business priorities and organizational goals
- [ ] Use case scope boundaries clearly documented and communicated
- [ ] Success metrics established with measurement methodologies and data sources
- [ ] Stakeholder alignment confirmed through formal review and approval
- [ ] Expected outcomes documented with quantitative and qualitative impacts
- [ ] Organizational awareness established through appropriate communications
- [ ] Value proposition clearly articulated to all stakeholders and affected teams

People

- [ ] Implementation champion identified with appropriate authority and commitment
- [ ] Executive sponsor engaged with defined responsibilities and visibility
- [ ] Project team assembled with necessary skills and capacity
- [ ] Training needs assessment completed for all affected roles
- [ ] Skills development plan created with learning objectives and resources
- [ ] Roles and responsibilities defined for implementation and ongoing operations
- [ ] Change management strategy established with communication plan and timeline
- [ ] User adoption approach developed with engagement incentives and monitoring
- [ ] Succession planning established for key implementation roles
- [ ] External resource requirements identified with procurement approach

Process

- [ ] Existing workflows documented with current state process maps
- [ ] Future state processes designed with AI integration touchpoints
- [ ] Transition approach defined with phased implementation plan
- [ ] Testing protocol developed with acceptance criteria and validation methodology

- [ ] Data flow mapping completed from source systems to AI application
- [ ] Governance guidelines established for AI usage and decision authority
- [ ] Exception handling procedures defined for edge cases and anomalies
- [ ] Performance monitoring processes established with review cadence
- [ ] Continuous improvement methodology defined for ongoing optimization
- [ ] Documentation standards established for process changes and knowledge capture

Platform

- [ ] Technical requirements defined with specificity and validation methodology
- [ ] Integration points identified with existing systems and data flows
- [ ] Data migration plan created with transformation rules and validation approach
- [ ] Security review completed with compliance validation and risk assessment
- [ ] Infrastructure requirements confirmed with capacity planning and scaling considerations
- [ ] Technical dependencies identified with sequencing and prerequisite actions
- [ ] Vendor selection completed with contractual terms and service level agreements
- [ ] Implementation environment established with appropriate staging and testing capabilities
- [ ] Disaster recovery and business continuity plans updated to incorporate AI systems
- [ ] Technical support model defined for ongoing operations and issue resolution

Performance

- [ ] Baseline metrics captured for pre-implementation comparison
- [ ] Key performance indicators defined for technical and business outcomes
- [ ] Monitoring system established with automated alerting and reporting
- [ ] Reporting cadence defined with appropriate distribution and review protocols
- [ ] Success criteria established for implementation phases and overall initiative
- [ ] Optimization process outlined for continuous performance improvement
- [ ] ROI tracking methodology implemented with financial impact assessment
- [ ] User feedback mechanism established for experiential evaluation
- [ ] Executive dashboard developed for visibility into implementation progress
- [ ] Post-implementation review process defined with lessons learned methodology

Implementation Guidance: Utilize this checklist as a comprehensive planning tool during the pre-implementation phase of each AI initiative. Assign specific ownership for each checklist item to ensure accountability and completion. Establish regular review sessions to assess progress against checklist items and address emerging issues. Customize the checklist based on specific initiative requirements and organizational context. Document completion status for audit and knowledge management purposes. Use the checklist to inform risk management strategies by identifying potential gaps in implementation readiness.

Section 5: Measuring What Matters – The AI Initiative Performance Dashboard

Part 5.1: The AI Initiative Performance Tracker

Effective measurement is essential for validating AI implementation success, guiding optimization efforts, and demonstrating business value. This comprehensive performance tracking framework provides a structured methodology for monitoring AI initiatives across both technical and business dimensions, connecting implementation activities to strategic outcomes. By establishing systematic measurement practices, organizations can validate return on investment, identify optimization opportunities, and build organizational confidence in AI capabilities.

The performance tracker integrates technical and business metrics into a unified measurement framework:

Performance Tracking Template:

AI Initiative	Business Objective	Key Performance Indicators	Baseline	Current Performance	Variance	Insights & Actions

Template Components in Detail:

- **AI Initiative:** Identify the specific artificial intelligence application implemented, referencing the initiative name established in planning documentation. This provides continuity between planning and measurement activities, ensuring consistent terminology and scope definition across the implementation lifecycle.

- **Business Objective:** Document the strategic goal addressed by this initiative, directly referencing the objectives established in the AI Marketing Goal Alignment Worksheet. This explicit connection maintains focus on business outcomes rather than technological capabilities, reinforcing the purpose-driven nature of AI implementation.

- **Key Performance Indicators**: Define the specific metrics used to evaluate implementation success, including both leading indicators (adoption, usage, technical performance) and lagging indicators (business outcomes, ROI, customer impact). Each KPI should include

measurement methodology, data source, calculation approach, and evaluation frequency.

- **Baseline**: Establish pre-implementation performance levels for each KPI, providing the comparative foundation for impact assessment. Baseline data should be thoroughly validated for accuracy and documented with appropriate contextual information, including measurement date, methodology, and any factors that might influence interpretation.

- **Current Performance:** Document post-implementation results for each KPI, using consistent measurement methodologies to ensure valid comparison with baseline data. Current performance should be updated at established intervals, creating a longitudinal view of implementation impact over time.

- **Variance:** Calculate the specific difference between baseline and current performance, expressed in both absolute terms (raw numerical difference) and relative terms (percentage change). This quantified variance provides clear visibility into the magnitude and direction of implementation impact.

- **Insights & Actions**: Analyze performance data to derive meaningful conclusions and determine appropriate next steps. This critical component transforms measurement from a passive observation activity into an active management tool, driving continuous improvement and strategic adaptation. Document specific insights, optimization opportunities, resource requirements, and action owners.

Extended Measurement Considerations:

Beyond the core template structure, effective performance measurement should incorporate several additional dimensions:

- **Leading vs. Lagging Indicators:** Balance early indicators of implementation success (adoption rates, system performance, initial user feedback) with longer-term business outcomes (revenue impact, efficiency gains, customer experience improvements). This multi-horizon approach provides both early validation and substantive business impact assessment.

- **Quantitative vs. Qualitative Metrics:** Incorporate both numerical measures (statistical performance, financial outcomes) and experiential indicators (user satisfaction, workflow improvement, decision quality). This balanced approach ensures that measurement considers both objective outcomes and subjective benefits.

- **Direct vs. Indirect Benefits:** Track both immediate, attributable impacts directly connected to the AI implementation and secondary benefits that emerge through organizational adaptation and capability enhancement. This comprehensive view captures

the full spectrum of implementation value.

- **Technical vs. Business Metrics**: Monitor both system performance indicators (accuracy, processing efficiency, technical reliability) and business outcome measures (financial impact, operational improvements, strategic advancement). This dual perspective connects technical capabilities to organizational value.

Implementation Guidance: Establish measurement protocols during the planning phase to ensure baseline data capture before implementation begins. Assign clear ownership for measurement activities, data analysis, and insight development. Conduct regular review sessions to evaluate performance trends, derive insights, and determine appropriate actions. Utilize measurement data to inform ongoing resource allocation, optimization priorities, and strategic decision-making. Leverage performance results in organizational communications to build AI credibility and support for future initiatives.

Conclusion: Your Next Steps with Trust Insights' Expertise

Congratulations on developing a comprehensive, structured approach to your artificial intelligence marketing strategy. By applying Trust Insights' proven frameworks—from initial opportunity identification with TRIPS to strategic alignment with 5P and STEM—you have established a systematic foundation for AI success that balances innovation with measurable outcomes. This methodical approach significantly increases implementation success probability by addressing the critical barriers that frequently derail AI initiatives.

The templates, worksheets, and frameworks provided in this kit deliver a robust starting point for your AI journey. However, successful transformation often benefits from specialized expertise that can accelerate progress, navigate organizational complexities, and address unique challenges. Trust Insights specializes in translating these methodological frameworks into customized implementation strategies that address your specific organizational context, technical environment, and business objectives.

Our team of experienced consultants brings deep expertise across all dimensions of AI strategy and implementation:

- Strategic AI Opportunity Identification: Applying the TRIPS framework to your specific marketing functions to identify high-impact use cases with maximum ROI potential.

- Organizational Readiness Assessment: Evaluating your current capabilities across People, Process, Platform, and Data dimensions to identify critical success factors and potential implementation barriers.

- Custom AI Implementation Roadmaps: Developing tailored transformation plans that align with your business priorities, resource constraints, and organizational culture.

- Data Quality Evaluation and Enhancement: Assessing your current data assets against the 6Cs framework to ensure a solid foundation for AI implementation.

- Performance Measurement and Optimization: Establishing comprehensive metrics frameworks that connect technical capabilities to business outcomes, validating investment and guiding continuous improvement.

Trust Insights' consulting methodology extends beyond theoretical guidance to deliver practical implementation support customized to your specific needs. Our collaborative approach ensures knowledge transfer throughout the engagement, building internal capabilities while accelerating transformation outcomes.

Ready to transform your AI marketing approach? Schedule a complimentary consultation to discuss how Trust Insights can help you apply these frameworks to your unique challenges and opportunities. Our team of experts will provide personalized guidance based on your current AI maturity, strategic priorities, and organizational context.

Contact Trust Insights Today for your free consultation.

Done By You services from Trust Insights:

- Generative AI Use Cases for Marketers course: Learn the 7 major use case categories for generative AI in marketing with 21 different hands-on exercises, all data and prompts provided.
- Mastering Prompt Engineering for Marketing course: Learn the foundation skills you need to succeed with generative AI including 3 major prompt frameworks, advanced prompting techniques, and how to choose different kinds of prompts based on the task and tool

Done With You services from Trust Insights:

- Keynote talks and workshops: Bring Trust Insights to your event! We offer customized keynotes and workshops for conferences, company retreats, executive leadership meetings, annual meetings, and roundtables. Every full-fee talk is customized to your event, industry, or company, and you get the talk recording and materials (transcripts, prompts, data) for your audience to work with and learn from.

Done For You services from Trust Insights:

- Customized consulting: If you love the promise of analytics, data science, and AI but don't love the huge amount of work that goes into fulfilling that promise, from data governance to agentic AI deployment, let us do it for you. We've got more than a decade of real-world AI implementation (AI existed long before ChatGPT) built on your foundational data so you can reap the benefits of AI while your competitors are still figuring out how to prompt.