



FREE GUIDE · GETTING STARTED WITH AI MARKETING

Best Practices for AI Marketing

A starting place for moving from traditional marketing to AI marketing

WRITTEN FOR

Business owners and marketing teams

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4

stages of AI marketing

7

steps to get started

90

day starter plan

INSIDE THIS GUIDE

1. Where marketing is today
2. The four stages of AI marketing
3. Seven steps to get started
4. Building each channel around AI
5. Your team and your first 90 days
6. Measuring success
7. Guardrails: quality, privacy and trust
8. Common mistakes to avoid
9. Choosing how to get there
10. The 10 best practices and your launch checklist

About this guide

Who it is for, how to use it and what is inside.

Most businesses already know AI will change marketing. Far fewer know where to start. This guide is that starting place. It describes where most marketing teams are today, explains what changes when marketing is built around AI, and lays out seven simple steps to move from one to the other without risking what already works.

It is written for owners of small and mid-sized businesses, marketing managers and in-house teams. It covers all of marketing, not just one channel: search, content, local listings and reviews, paid ads, social media, email, your website, video and reporting. No technical background is needed.

HOW TO USE IT
Read Part 1 and take the self-check in Part 2 to find your stage. Then work through the steps in Part 3 in order, using the 90-day plan in Part 5 to pace yourself. Part 10 sums up everything on two pages you can print and keep.

CONTENTS

1	Where marketing is today	3
2	The four stages of AI marketing	4
3	Seven steps to get started	6
4	Building each channel around AI	12
5	Your team and your first 90 days	13
6	Measuring success	14
7	Guardrails: quality, privacy and trust	15
8	Common mistakes to avoid	16
9	Choosing how to get there	17
10	The 10 best practices and your launch checklist	18
	Launch checklist	18
	Glossary and next steps	19

PART 1

Where marketing is today

The traditional setup most businesses start from, and why it is hard to grow.

Most small and mid-sized businesses market much the way they did ten years ago, with more tools layered on top. Before changing anything, it helps to name that starting point clearly.

The traditional marketing setup

- **Channels in separate boxes.** SEO, ads, social, email and the website are run by different people or vendors, each with its own report.
- **Work done by hand.** Someone writes every post, builds every report and adjusts every campaign, so output is limited by hours.
- **A monthly rhythm.** Results are reviewed once a month, so a campaign that stops working can waste weeks of budget before anyone notices.
- **Budgets set by habit.** Spend is split the way it was last year, not by what is producing leads now.
- **Too many tools.** Several subscriptions that do not share data, and logins nobody remembers.
- **Knowledge in people's heads.** The brand voice, the best offers and what worked before live with one person or one agency.

THE REAL COST

The problem is not effort; traditional teams work hard. The problem is that manual work does not scale. Every new channel, location or campaign needs more hours, and the hours run out before the opportunities do.

Common starting points

WHO	TYPICAL SETUP	MAIN CONSTRAINT
Owner-led business	The owner or office manager posts on social and updates the website when there is time	No time; marketing is the first thing to slip
Small in-house team	One to three marketers covering every channel	Too many channels for too few people
Agency retainer	An outside agency runs SEO, ads or social for a monthly fee	Slow turnaround, limited visibility and a high fixed cost
Mixed	Some in-house work, some freelancers, some agency	Nobody owns the whole picture

Where AI already shows up

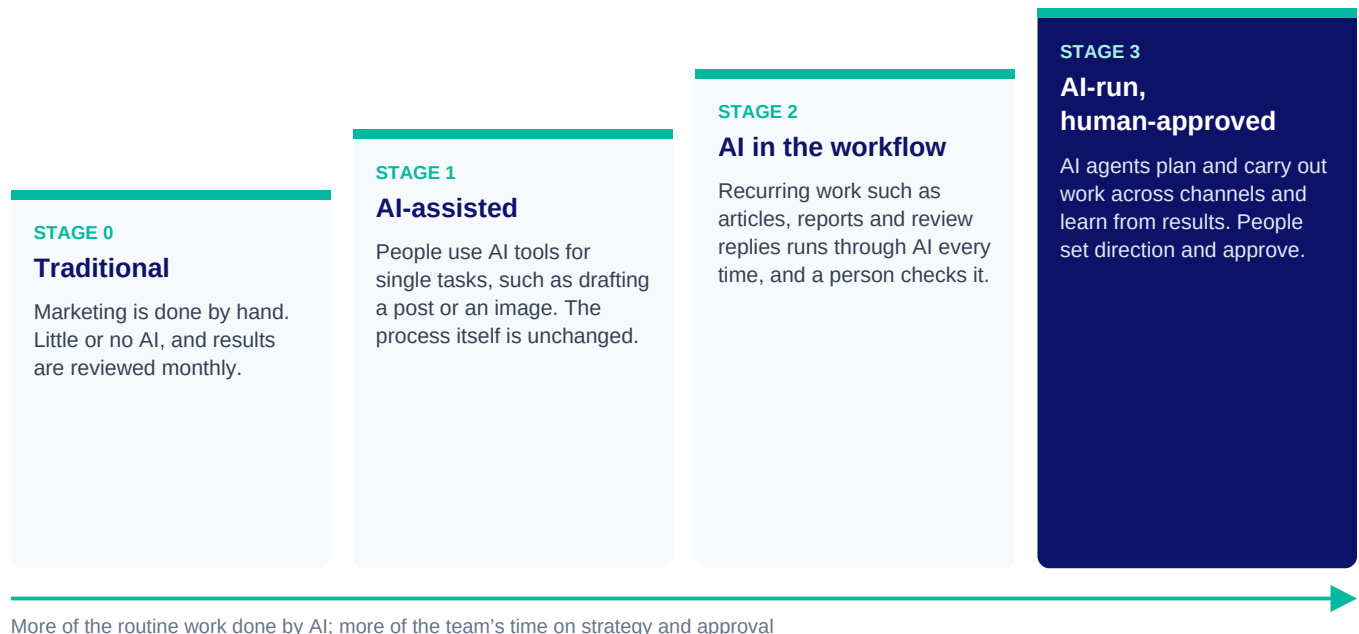
Many teams already use AI without a plan: someone drafts posts in ChatGPT, an ad platform suggests keywords, a design tool removes a background. That is a start, but it is AI as a typing aid. The rest of this guide is about AI as the way your marketing runs.

PART 2

The four stages of AI marketing

Find where you are now, and see where you are heading.

Moving to AI marketing happens in stages. Each stage hands more of the routine work to AI and moves more of your team's time to strategy and approval.



Most businesses are at Stage 0 or 1. This guide aims to get you to Stage 2 within 90 days, with a clear path to Stage 3.

Quick self-check

Answer yes or no to each statement, then count your yes answers.

1. We have one written document that describes our brand voice, customers and offers.
2. Google Analytics, Search Console and our ad accounts are connected and tracking leads or sales.
3. We know roughly how many hours a month each marketing task takes.
4. At least one recurring task, such as blog posts or reports, is produced with AI every time.
5. Every piece of AI-produced work is reviewed by a person before it goes out.
6. We publish new content every week, not just when someone has time.
7. Results in one channel change what we do in another, for example search terms shaping social posts.
8. We review performance at least weekly.
9. We know our cost per lead for each channel.
10. We have written rules for what AI may and may not do in our marketing.

YES ANSWERS	YOUR STAGE	WHERE TO START
0 to 2	Stage 0: Traditional	Steps 1 to 3: baseline, data foundations and brand
3 to 5	Stage 1: AI-assisted	Steps 2 to 4: fix tracking and start your first workflow
6 to 8	Stage 2: AI in the workflow	Steps 5 to 7: approval rules, connected channels, scaling
9 to 10	Stage 3: AI-run, human-approved	Step 7 and the channel playbook in Part 4

What changes with AI marketing

AREA	TRADITIONAL	AI MARKETING
Speed	Days or weeks per campaign or article	Hours, with time left for review
Output	Limited by staff hours	Limited by review time and budget
Reporting	Monthly, assembled by hand	Continuous, with plain-language summaries
Optimization	Changes made at the monthly review	Adjustments as data comes in, within rules you set
Channels	Run separately	Connected; each channel's data informs the others
Knowledge	In people's heads	Written down once and reused by every tool and agent
Team role	Producing the work	Setting strategy, reviewing and approving

WHAT DOES NOT CHANGE

Your customers, your offer and your judgment. AI makes good marketing faster; it does not make a weak offer strong. The businesses that do best with AI know exactly who they serve and why customers choose them.

PART 3

Seven steps to get started

Small steps, in order. Each one makes the next work better.



STEP 1

Take stock of what you have

Know your starting point before you change anything.

WHY IT MATTERS

You cannot show improvement without a baseline, and you cannot choose what to hand to AI first until you know where the hours and the money go.

WHAT TO DO

- List every channel you use: website, Google Business Profile, search engine optimization (SEO), paid search, paid social, organic social, email, reviews and video.
- For each channel, note who runs it, which tools it uses, what it costs each month and how many hours it takes.
- Record today's numbers: monthly leads or sales, cost per lead, website visitors, rankings for your top services, and review count and rating.

CHECKLIST

- ☐ Every channel listed with an owner
- ☐ Monthly cost recorded for each channel
- ☐ Hours per task estimated
- ☐ Baseline numbers saved with today's date

COMMON MISTAKE

Skipping the baseline. In three months you will want to show what changed, and without today's numbers you cannot.

2

STEP 2

Fix your data foundations

AI can only learn from what it can see.

WHY IT MATTERS

AI tools and agents make decisions from your data. If leads are not tracked or accounts are not connected, AI optimizes for the wrong thing, or for nothing at all.

WHAT TO DO

- Set up Google Analytics 4 and Google Search Console, and verify both for your domain.
- Claim and complete your Google Business Profile if you serve local customers.
- Track the actions that bring revenue as conversions: form submissions, calls, bookings and purchases. Test each one.
- Link your ad accounts to analytics so spend and results appear side by side.
- Put a cookie consent banner and a privacy policy in place that match how you actually track visitors.

CHECKLIST

- ☐ Analytics and Search Console verified
- ☐ Conversions tracked and tested
- ☐ Business Profile complete and accurate
- ☐ Ad accounts linked to analytics
- ☐ Consent banner and privacy policy live

COMMON MISTAKE

Tracking page views instead of leads. Traffic is easy to grow and easy to misread. Measure the actions that pay the bills.

3

STEP 3

Write your brand down once

Give AI the context a new employee would need on day one.

WHY IT MATTERS

Generic AI output comes from generic input. A short, clear brand document is the single biggest improvement you can make to AI quality, and every tool and agent can reuse it.

WHAT TO DO

- Describe your ideal customers: who they are, the problem they have and the words they use to search for help.
- List your services or products, price ranges, service areas and what makes you different from competitors.
- Define your voice in a few lines, with examples of words you use and words you never use.
- Collect your proof: reviews, results, certifications, years in business and guarantees.

CHECKLIST

- ☐ Ideal customer described
- ☐ Offers, prices and service areas listed
- ☐ Voice and banned phrases written down
- ☐ Proof points collected
- ☐ Stored where every tool and person can use it

COMMON MISTAKE

Letting AI invent your positioning. AI can help you word it, but the facts and the point of view must come from you.

4

STEP 4

Start with one repetitive workflow

Prove the value on one task before you change everything.

WHY IT MATTERS

Starting small keeps the risk low and gives you a clear before-and-after. Choose work that happens often, follows a pattern and takes real hours today.

WHAT TO DO

- Pick one workflow from the table below.
- Write down how the task is done today, step by step, and how long it takes.
- Run the same task with AI for four weeks, with a person reviewing every output.
- Compare the time spent, the quality and the results against your baseline.

GOOD FIRST WORKFLOW	WHY IT WORKS
Blog articles	Frequent and structured, and it directly supports search visibility and AI search citations.
Social posts	High volume and short, so they are quick to review.
Monthly reporting	Pulls from the accounts you connected in Step 2 and saves hours of copying numbers.
Review replies	Repetitive, time-sensitive and visible to every future customer.
Ad copy variations	Lets you test more messages than anyone could write by hand.

COMMON MISTAKE

Automating everything at once. When several things change together, you cannot tell what worked.

5

STEP 5

Move people from producing to approving

AI does the first draft. People make the call.

WHY IT MATTERS

Human review protects accuracy, your brand and legal compliance. It also keeps your team's judgment, the part AI cannot replace, at the center of your marketing.

WHAT TO DO

- Decide what needs approval before it goes live: anything published, anything that spends money and anything that speaks for the business.
- Use a short review checklist: facts correct, claims supportable, on brand, no private data, links working.
- Set hard limits, such as the largest budget change allowed without approval, topics to avoid and words never to use.
- Decide how you will label AI-generated content where your industry or a platform requires it.

CHECKLIST

- ☐ Approval rules written down
- ☐ Review checklist in use
- ☐ Spending limits set
- ☐ Disclosure rules decided

COMMON MISTAKE

Rubber-stamping. Approval only protects you if someone actually reads the work, so keep review batches small enough to read properly.

6

STEP 6

Connect your channels

Let every channel learn from the others.

WHY IT MATTERS

In traditional marketing each channel learns on its own. With connected data, what works in one place improves the rest. This is where AI marketing pulls furthest ahead of manual work.

WHAT TO DO

- Use the search terms that convert in paid ads as topics for articles and social posts.
- Turn every new article into social posts, an email and a short video script.
- Feed the questions customers ask in reviews, calls and chats into your website FAQ and content plan.
- Move budget toward the channels and messages with the lowest cost per lead.

EXAMPLE

A roofing company sees that "storm damage roof inspection" converts well in paid search. That phrase becomes an article, three social posts and an email to past customers. As the article starts to rank, the company pays for fewer of those clicks.

COMMON MISTAKE

Keeping separate vendors who never share data. Connection is the point; silos cancel most of the gain.

7

STEP 7

Measure, then scale

Expand what works. Fix or stop what does not.

WHY IT MATTERS

AI makes it easy to do more. More only helps if it moves the numbers you recorded in Step 1.

WHAT TO DO

- Review results briefly every week and in depth every 30 days.
- Compare each review against your Step 1 baseline: leads, cost per lead, hours spent, output and rankings.
- When a workflow beats the old way for two review cycles in a row, add the next one.
- Cancel tools and stop tasks that no longer earn their cost.

CHECKLIST

- ☐ Weekly review on the calendar
- ☐ 30, 60 and 90-day reviews scheduled
- ☐ Baseline comparison in every review
- ☐ Next workflow chosen

COMMON MISTAKE

Judging by volume. Publishing three times as much is only a win if leads, rankings or sales follow.

PART 4

Building each channel around AI

What changes in each part of your marketing, and the best first move.

Once your foundations are in place, each channel can move from manual work to AI-run work with human approval. You do not need to change them all at once. Use the "first move" column to pick the next one.

CHANNEL	TRADITIONAL WAY	AI WAY	FIRST MOVE
SEO and content	Occasional articles; keyword research once a year	Steady publishing guided by live search data; pages refreshed as rankings change	Publish one researched article a week for your top service
AI search	Not considered	Clear, factual pages with structured data that ChatGPT, Perplexity and Google AI Overviews can cite	Add a plain-language FAQ to your top service pages
Local search and reviews	Business Profile set up once; reviews answered when someone notices	Profile kept current; every review answered within a day; a page for each service area	Reply to every review from the last 90 days
Paid search	Campaigns adjusted at the monthly review	Bids, keywords and ads adjusted within your limits as data comes in; search terms reviewed weekly	Confirm conversion tracking, then test three ads per ad group
Paid social	Boosted posts with broad targeting	Creative and audience tests run all the time; spend follows results	Test three creative versions against one audience
Organic social	Posts when someone has time	A weekly calendar drafted from your content and approved in one sitting	Draft a month of posts from your last four articles
Email	An occasional newsletter to everyone	Messages triggered by what each person does, such as a new enquiry or a past purchase	Set up a welcome sequence for new leads
Website and conversion	A redesign every few years	Ongoing tests of headlines, offers and forms	Test a new headline on your top landing page
Video and creative	Expensive shoots, rarely refreshed	Short videos and images made from scripts and brand assets, refreshed often	Turn your best article into a 30-second video
Reporting	A spreadsheet built by hand each month	Dashboards that update themselves, with plain-language summaries	Automate one monthly report

A NOTE ON AI SEARCH

More people now ask ChatGPT, Perplexity or Google's AI Overviews instead of scrolling through search results. These tools cite pages that answer questions clearly and factually. The same habits that help traditional SEO help here: specific answers, real expertise, up-to-date facts and structured data.

PART 5

Your team and your first 90 days

Who does what once AI is part of the team, and a simple plan to pace the change.

Who does what

TASK	AI	PEOPLE
Research	Gathers keyword, competitor and market data and summarizes it	Decide which opportunities matter
Planning	Drafts content calendars and campaign plans	Set goals, budget and priorities
Content and creative	Writes drafts and produces images and video	Edit, fact-check and approve
Campaign changes	Suggests and makes changes within set limits	Set the limits and review big moves
Reporting	Compiles the numbers and explains the trends	Decide what to do next
Customer conversations	Drafts replies to reviews and messages	Handle complaints and sensitive cases

New roles for the marketing team

- **Strategist.** Owns the goals, the budget and the positioning.
- **Editor.** Reviews AI work for accuracy, tone and brand.
- **Analyst.** Reads the results and decides what to scale or stop.

In a small business one person may hold all three roles, and that is fine. The job moves from making every piece to directing the work.

Your first 90 days

DAYS 1 TO 30 Foundations	DAYS 31 TO 60 First workflow	DAYS 61 TO 90 Connect and expand
• Complete Steps 1 to 3 • Fix tracking and connect your accounts • Write your brand document • Choose your first workflow	• Run the workflow with AI every week • Review every output before it goes out • Track hours saved and quality • Start weekly results check-ins	• Compare results with your baseline • Connect a second channel! (Step 6) • Add your next workflow • Set the plan for next quarter

PART 6

Measuring success

The numbers that show whether AI marketing is working.

Metric	What it tells you	Where to find it
Leads or sales	Whether marketing is producing revenue	Analytics conversions, your CRM or booking system
Cost per lead	How efficiently spend turns into leads, by channel	Ad platforms together with analytics
Hours spent	How much team time AI is saving	Your Step 1 estimate compared with now
Output	How much is being published and tested	Your content calendar
Search visibility	Rankings and clicks for your key services	Google Search Console
Reviews	Count, rating and how fast you respond	Google Business Profile
Conversion rate	How well your site turns visitors into leads	Google Analytics

KEEP IT SIMPLE

Pick three numbers to watch every week, usually leads, cost per lead and hours spent. Look at the rest once a month.

PART 7

Guardrails: quality, privacy and trust

Rules that keep AI marketing accurate, legal and on brand.

- **Accuracy.** Check facts, prices, claims and statistics before anything is published. AI can state wrong things with confidence.
- **Brand.** Use your brand document every time, and keep a list of phrases you never want to see.
- **Privacy and consent.** Track visitors only as your privacy policy and consent banner say. Honor opt-outs, including browser privacy signals such as Global Privacy Control where the law requires it.
- **Customer data.** Do not paste sensitive customer information into tools that are not approved for it, and check where each tool stores your data.
- **Disclosure.** Follow each platform's and your industry's rules on labeling AI-generated content. Never present AI images as real customers or real results.
- **Spending.** Set hard limits on budgets and bid changes that AI cannot exceed without approval.
- **Ownership.** Keep accounts, data and content in your business's name, not a vendor's.

REGULATED INDUSTRIES

Healthcare, legal, financial services and other regulated fields have extra rules on advertising claims and data. Check them before automating anything customer-facing. This guide is general information, not legal advice.

PART 8

Common mistakes to avoid

Ten ways AI marketing goes wrong, and how to steer clear of each.

1. **Buying tools before setting goals.** Decide what you want to improve first, then choose tools that serve it.
2. **Publishing AI drafts without review.** One wrong price or invented claim costs more trust than a month of posts earns.
3. **Using generic prompts.** Without your brand document, AI writes like everyone else.
4. **Measuring output instead of results.** Count leads and cost per lead, not posts and articles.
5. **Changing everything at once.** Add one workflow at a time so you can see what works.
6. **Letting vendors own your data.** Keep accounts, content and data in your business's name.
7. **Ignoring tracking and consent.** Broken tracking misleads AI; missing consent creates legal risk.
8. **Chasing every new tool.** A few connected tools beat many disconnected ones.
9. **Forgetting the customer.** Content written only for search engines reads poorly and converts poorly.
10. **Stopping after the first workflow.** The biggest gains come from connecting channels in Step 6.

PART 9

Choosing how to get there

Three common approaches. The seven steps apply to all of them.

APPROACH	WHAT IT MEANS	BEST FOR	WATCH OUT FOR
Do it yourself with tools	Your team buys AI tools for each task and connects them	Teams with time and technical skill	Many subscriptions and data that never connects
AI marketing platform	One platform whose AI agents handle several channels from shared data	Small and mid-sized businesses that want results without a large team	Make sure you approve the work and own your data
AI-driven agency	An agency runs AI-powered marketing for you	Businesses that want it fully managed	Cost, and how much of the work you can see

Whatever you choose, ask the same questions: Can we approve work before it goes live? Do we own the accounts and data? Can we see what was done and why? How is our data protected?

PART 10

The 10 best practices

The whole guide on one page.

1. **Start from a baseline.** Record today's numbers before you change anything.
2. **Fix tracking before you automate.** AI learns from your data, so make sure the data is right.
3. **Write your brand down once.** Reuse the same brand document in every tool and every brief.
4. **Automate one workflow at a time.** Prove each one before adding the next.
5. **Keep a person in charge of approval.** Anything that is published, spends money or speaks for you gets reviewed.
6. **Connect your channels.** Let search, content, ads, social and email learn from each other.
7. **Review weekly, decide monthly.** Short weekly check-ins, deeper 30-day reviews.
8. **Measure leads and cost, not volume.** More content is only better if results follow.
9. **Respect privacy, consent and disclosure.** Track only as your policy says and honor every opt-out.
10. **Own your accounts, data and content.** Whatever tools or partners you use, the assets stay yours.

Launch checklist

Tick these off as you go. When they are all done, you are running AI marketing.

FOUNDATIONS

- ☐ Baseline numbers recorded (Step 1)
- ☐ Analytics, Search Console and ad accounts connected (Step 2)
- ☐ Conversions tracked and tested (Step 2)
- ☐ Consent banner and privacy policy live (Step 2)

BRAND

- ☐ Brand document written: customers, offers, voice and proof (Step 3)
- ☐ Banned phrases listed (Step 3)

FIRST WORKFLOW

- ☐ One workflow chosen and documented (Step 4)
- ☐ Four weeks run with AI and reviewed (Step 4)

GUARDRAILS

- ☐ Approval rules and review checklist in use (Step 5)
- ☐ Spending limits set (Step 5)
- ☐ Disclosure rules decided (Step 5)

GROWTH

- ☐ A second channel connected (Step 6)
- ☐ Weekly and 30-day reviews on the calendar (Step 7)
- ☐ Next workflow chosen (Step 7)

Glossary

Plain-language definitions of the terms used in this guide.

TERM	WHAT IT MEANS
AI agent	Software that plans and carries out a series of tasks toward a goal, using tools and data, rather than answering one prompt at a time.
Workflow	A repeatable sequence of tasks, such as research, draft, review and publish.
Prompt	The instruction given to an AI tool.
Brand document	The written background (customers, offers, voice, proof) that AI uses to produce relevant work.
Human in the loop	A person reviews or approves AI work before it takes effect.
Conversion	An action that matters to your business, such as a form, a call, a booking or a purchase.
Cost per lead	Total marketing spend on a channel divided by the leads it produced.
Google Analytics 4 (GA4)	Google's free analytics tool for measuring website visits and conversions.
Google Search Console	Google's free tool that shows how your site appears and performs in search.
Google Business Profile	Your business listing in Google Search and Maps.
AI search	Tools such as ChatGPT, Perplexity and Google AI Overviews that answer questions directly and cite sources.
Structured data	Code on a web page that tells search engines and AI tools what the page is about.
Consent Mode	Google's method for adjusting its tags to each visitor's cookie choice.

Where to go from here

Take the self-check in Part 2, pick your starting step, and put the first 30 days of the plan on your calendar this week.

How Intellisea can help

Intellisea is an agentic AI marketing platform. Its AI agents handle research, SEO and content, local search, Google Ads, video and reporting from one shared picture of your business, while your team reviews and approves the work. Social publishing for Meta and LinkedIn is coming soon. Our agents are built on Anthropic's Claude models, and the platform is powered by AWS.

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