

Salesforce AI Implementation Checklist for Marketing

Tap into the latest innovations around AI & make every interaction count to connect with your customers.

62%

of respondents already use AI.

19%

use it to quickly segment leads

86%

of IT leaders see generative AI as a major disruptor

As Per Salesforce State of marketing report

AI Implementation Checklist For Marketing

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| <ul style="list-style-type: none">✔ Set clear goals :
Define what you want AI to achieve - better customer targeting, personalized content, or something else✔ Use good data :
Make sure you have clean, relevant data for training AI models✔ Choose the right AI tools :
Pick the algorithms and models that fit your goals and data✔ Check your tech setup :
Ensure your systems can handle AI implementation✔ Follow rules and maintain ethics
Adhere to data privacy laws and ethical guidelines✔ Work together
Collaborate between marketing, data and IT teams for success | <ul style="list-style-type: none">✔ Test and validate :
Check AI models for accuracy and reliability before using them✔ Be scalable and flexible :
Design AI solutions that can grow and adapt with your business✔ Monitor performance :
Keep track of how AI affects marketing metrics like ROI and engagement✔ Keep learning :
Stay updated with new AI trends and best practices✔ Focus on user experience :
Make AI interactions seamless and valuable for customers✔ Manage change :
Help your team adjust to using AI through training and support |
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Use AI to Assist Your Marketing Team:

Segmentation & Targeting

- **Use Data Cloud** for real-time audience segmentation and personalized website content.
- **Leverage Data Cloud's lookalike features** to create audiences similar to your existing customers.

Improve Orchestration

- **AI chatbots** assist sales by providing product info and personalized recommendations
- **Virtual assistants** boost efficiency by taking notes, scheduling calls and more.
- **Send Time Optimization and Einstein Engagement Frequency** schedule emails at the best time and volume.
- **Machine learning** automates complex decisions, extracting insights from customer communications
- **AI** can give you relevant keyword suggestions based on searches to improve SEO.
- **Predictive AI** enhances A/B testing for CTAs, subject lines and landing pages.

Advance Personalization

- **Einstein Content Selection** evaluates images for the highest click-through rates, optimizing campaigns.
- **NLP and machine translation** enable multilingual campaigns for global engagement.

Valuable Insights With Analytics

- Track attribution modelling and performances, and make accurate predictions
- **Machine learning** forecasts market demand, aligning campaigns when demand peaks.
- **Einstein Messaging Insights** tracks campaign performance and provides detailed insights from the Marketing Cloud console.



Get started with AI in marketing with CEPTES

