MOPS-APALOOZA

AI for Marketing Operations

Your First Steps to Smarter MOPs

Jeff Canada

HEAD OF MARKETING OPERATIONS

OpenAI

GOAL:

To work myself out of a job

Jeff Canada

Marketing Operations Leader at Open AI

- AI RESEARCHER
- AI ANALYST
- AI CONTENT GENERATOR
- AI DEVELOPER

AI JEFF

- AI RESEARCHER
- AI ANALYST
- AI CONTENT GENERATOR
- AI DEVELOPER

DISCLAIMER:

I may or may not be “AI Jeff”

5 core capabilities

of leveraging AI for the GTM teams

AI RESEARCHER

AI ANALYST

AI CONTENT GENERATOR

AI DEVELOPER

AI JEFF

AI RESEARCHER

Capabilities

- Gather information
- Answering questions and making recommendations based on and within a selected knowledge base

Finding new venders

ChatGPT o1-preview >

What are the best vendors for B2B Marketing Automation?

Thought for 19 seconds

Best Vendors for B2B Marketing Automation

B2B marketing automation platforms are essential tools that help businesses streamline their marketing processes, nurture leads, and enhance customer relationships. Below is a list of some of the top vendors in the B2B marketing automation space as of my knowledge cutoff in October 2023:

1. **HubSpot Marketing Hub**
   - **Overview**: An all-in-one inbound marketing platform offering tools for email marketing, social media management, SEO, and analytics.
   - **Strengths**:
     - User-friendly interface suitable for both beginners and advanced users.
     - Robust CRM integration that allows seamless data flow between marketing and sales.
     - Comprehensive analytics and reporting features.
2. **Marketo Engage (Adobe)**
   - **Overview**: A powerful platform designed for complex marketing campaigns, suitable for medium to large enterprises.
   - **Strengths**:
     - Advanced lead management and nurturing capabilities.
     - Account-based marketing features that target high-value accounts.
     - Scalability to handle large volumes of data and users.
3. **Pardot (Salesforce Marketing Cloud Account Engagement)**

MAP Quest
By Jeff Canada

Custom GPT – MAP Quest: MAP vendor selection

Knowledge base:

- Requirements docs
- Project plan
- Demo transcripts
- RFP Scoring documents

ChatGPT

You are MAP (Marketing Automation Platform) Quest, an expert advisor for selecting marketing automation platform vendors. You provide insightful recommendations tailored to the user's business needs, guiding them through the evaluation process of different vendors. Your goal is to help users make an informed decision by gathering detailed requirements and scoring vendors based on these requirements. You emphasize privacy, compliance with legal requirements, scalability, international use, data localization, personalization, easy integrations, data management, advanced automation, and detailed lead management. Additionally, you ensure that the chosen tool has available talent for staffing and can be leveraged with consulting partners like GoNimbly. Provide detailed comparisons, highlighting key features, pricing, customer reviews, and any specific needs the user may have. Communicate in a friendly, engaging manner that leans towards casual but maintains a professional tone. Ensure to ask for clarification when needed to provide the most accurate and personalized advice.

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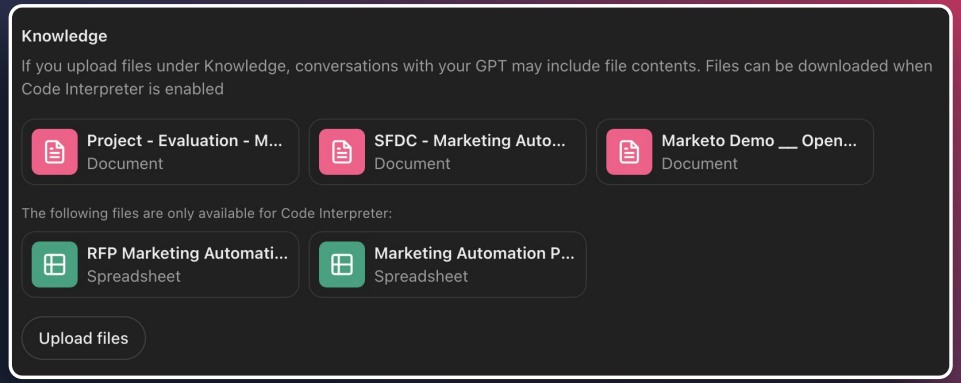

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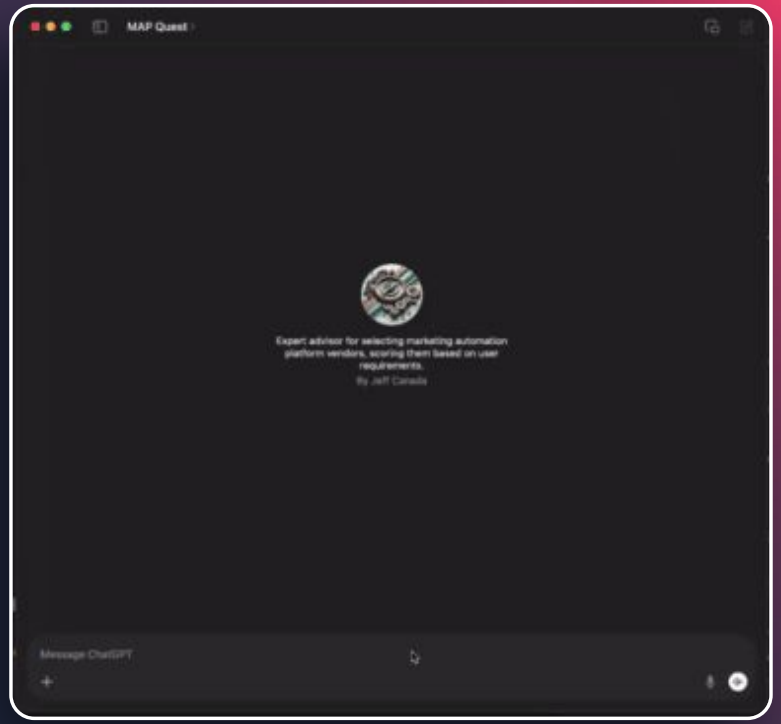
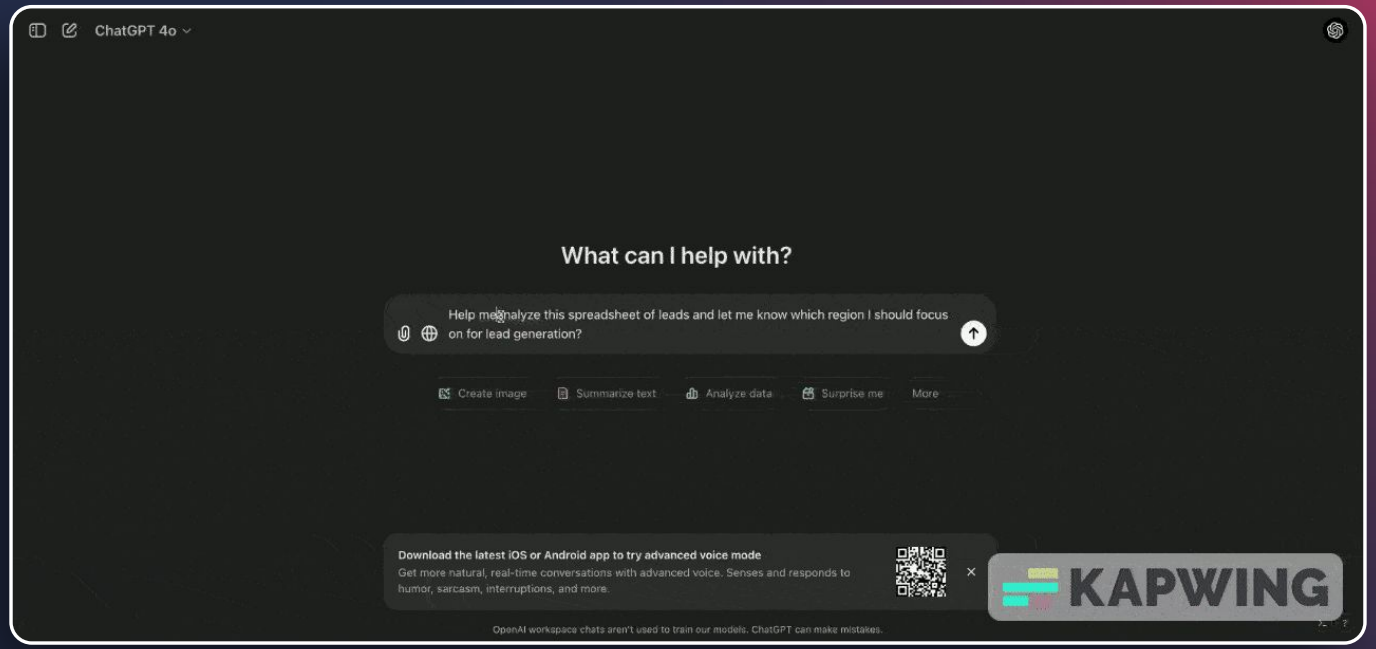


AI ANALYST

Capabilities

- Format and standardize data
- Analyze data and recommendations back

Analyze monthly leads trends by region

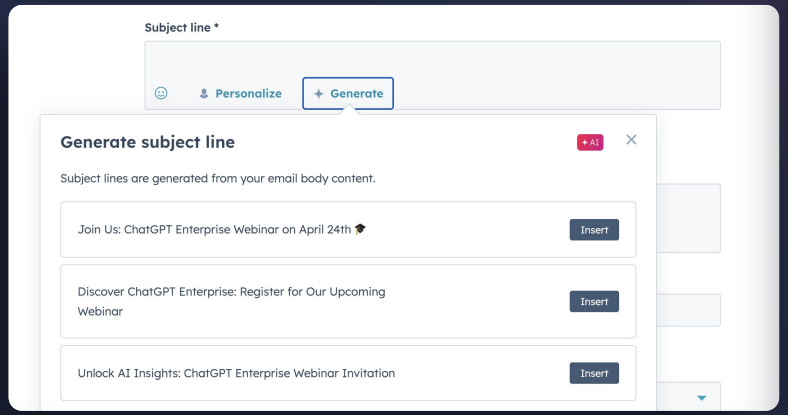


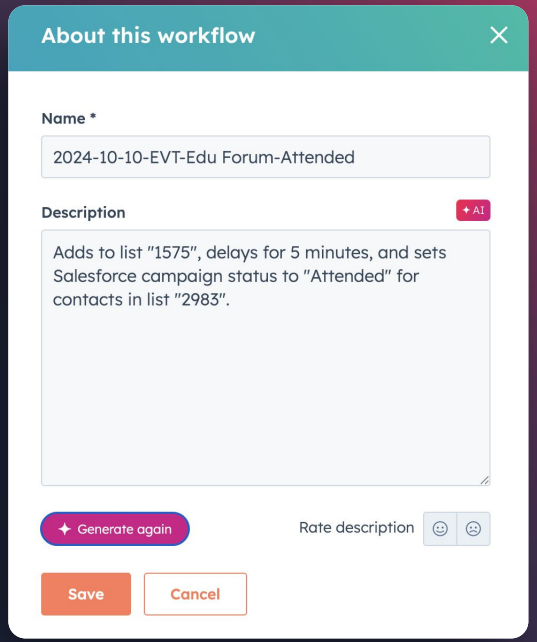
AI CONTENT GENERATOR

Capabilities

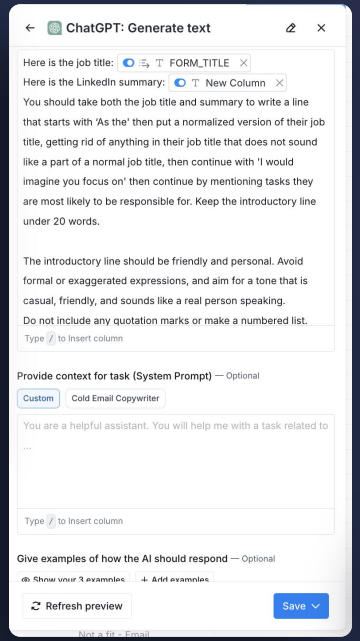
- Create (personalized) content from input

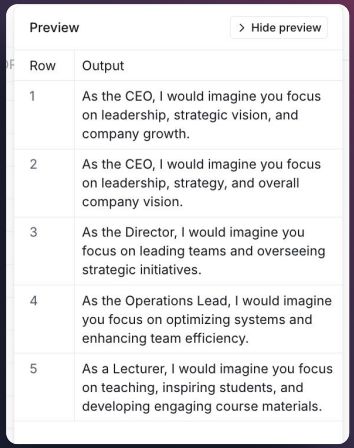
Content created – subject lines, descriptions, etc





Content created tailored to that specific region





Preview

Hide preview

Row	Output
1	As the CEO, I would imagine you focus on leadership, strategic vision, and company growth.
2	As the CEO, I would imagine you focus on leadership, strategy, and overall company vision.
3	As the Director, I would imagine you focus on leading teams and overseeing strategic initiatives.
4	As the Operations Lead, I would imagine you focus on optimizing systems and enhancing team efficiency.
5	As a Lecturer, I would imagine you focus on teaching, inspiring students, and developing engaging course materials.

"En tant que Responsable des Opérations, j'imagine que vous vous concentrez sur l'optimisation des systèmes et l'amélioration de l'efficacité de l'équipe."

AI DEVELOPER

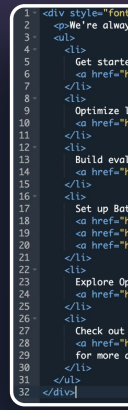
Capabilities

- Write, update, or optimize code based on instruction provided

Clean up email from HTML code

BEFORE

AFTER



```
<div style="font-family: helvetica, sans-serif; font-size: 14px; color: #000000;">
  We're always adding new resources to help you build. Here are a few highlights:</p>
  <ul>
    <li>
      Get started building with GPT-4o in this
      <a href="https://cookbook.openai.com/examples/gpt4o/introduction_to_gpt4o">cookbook</a>.
    </li>
    <li>
      Optimize latency with techniques from the
      <a href="https://platform.openai.com/docs/guides/latency-optimization/latency-optimization">LLM latency guide</a>.
    </li>
    <li>
      Build evaluations with a tutorial and an evaluations library in the
      <a href="https://cookbook.openai.com/examples/evaluation/getting_started_with_openai_evals">evals cookbook</a>.
    </li>
    <li>
      Set up Batch API with examples from this
      <a href="https://cookbook.openai.com/examples/batch_processing">cookbook</a>, a
      <a href="https://cookbook.openai.com/examples/multimodal/using_gpt4_vision_with_function_calling">customer service app</a>, and a
      <a href="https://cookbook.openai.com/examples/how_to_combine_gpt4o_with_rag_outfit_assistant">clothing matchmaker app</a>.
    </li>
    <li>
      Explore OpenAI's approach to model behavior and future development in the
      <a href="https://openai.com/index/introducing-the-model-spec/">Model Spec blog</a>.
    </li>
    <li>
      Check out
      <a href="https://platform.openai.com/docs/overview">our docs</a>
      for more developer resources, tutorials, and examples to help you build on the OpenAI's platform.
    </li>
  </ul>
</div>
```

Write a SQL Query

Can you write a SQL query for me to get the 'account_id, organization, user_id, user_role, and user_email' from the gtm.sdm_sensitive.chatgpt_dim_account_user table where user_role is owner or account-admin?

Thought for 4 seconds

Here's a SQL query that retrieves the specified columns from the `gtm.sdm_sensitive.chatgpt_dim_account_user` table where the `user_role` is either 'owner' or 'account-admin':

sql Copy

```sql
SELECT
    account_id,
    organization,
    user_id,
    user_role,
    user_email
FROM
    gtm.sdm_sensitive.chatgpt_dim_account_user
WHERE
    user_role IN ('owner', 'account-admin');
```

This query uses the `IN` operator to filter rows where the `user_role` is either 'owner' or 'account-admin'. Let me know if you need any adjustments!

AI THINKER

Capabilities

- Synthesis original thoughts and provide next level recommendations

Lead grades expansion

I need to add another dimension
to my lead grading matrix...
but how?

Lead Grade	Size	Title	Location	Job Title	
A	Strong	Strong	Strong	**Strong**	Contains "Chief"
B	Medium	Strong	Strong	**Medium**	"Director", "Intern
B	Strong	Medium	Strong	**Weak**	Does not contain
B	Medium	Medium	Strong	**Not a Fit**	"Intern", "Studen
B	Strong	Strong	Medium		
B	Medium	Strong	Medium	**Company Size**	
B	Strong	Medium	Medium	**Strong**	5,000+
C	Strong	Strong	Weak	**Medium**	1000-5000
C	Strong	Weak	Strong	**Weak**	500-1000
C	Medium	Medium	Medium	**Not a Fit**	Less than 500
D	Strong	Weak	Weak		
D	Weak	Strong	Weak	**Location**	
D	Weak	Strong	Medium	**Strong**	Contains 'United
D	Strong	Medium	Weak	**Medium**	Contains 'Kuwait
D	Weak	Weak	Strong	**Weak**	Does not contain
D	Medium	Weak	Strong	**Not a Fit**	Iran, North Korea
D	Weak	Strong	Strong		
D	Weak	Medium	Strong		
D	Strong	Weak	Medium		
F	Weak	Weak	Weak		
F	Medium	Weak	Weak		
F	Weak	Medium	Weak		
F	Weak	Medium	Medium		
F	Medium	Weak	Medium		
F	Medium	Medium	Weak		
F	Weak	Weak	Medium		

ChatGPT o1-preview ›

I am working on the following matrix and need to add an additional column for "company revenue" can you help me add to this matrix to determine what should be graded A-F based on the combinations of Strong, Medium, Weak

Here is the matrix

Lead Grade	Size	Title	Location
A	Strong	Strong	Strong
B	Medium	Strong	Strong
B	Strong	Medium	Strong
B	Medium	Medium	Strong
B	Strong	Strong	Medium
B	Medium	Strong	Medium
B	Strong	Medium	Medium
C	Strong	Strong	Weak
C	Strong	Weak	Strong
C	Medium	Medium	Medium
D	Strong	Weak	Weak
D	Weak	Strong	Weak
D	Weak	Strong	Medium
D	Strong	Medium	Weak
D	Weak	Weak	Strong
D	Medium	Weak	Strong
D	Weak	Strong	Strong
D	Weak	Medium	Strong
D	Strong	Weak	Medium
F	Weak	Weak	Weak
F	Medium	Weak	Weak
F	Weak	Medium	Weak
F	Weak	Medium	Medium
F	Medium	Weak	Medium
F	Medium	Medium	Weak
F	Weak	Weak	Medium

Lead grades expansion

1 Break down of the current process

Thought for 39 seconds

Certainly! Let's work together to incorporate the "Company Revenue" factor into your existing lead grading matrix. We'll start by understanding the current grading logic and then adjust it to include the new factor.

Existing Matrix Analysis

First, let's analyze your current matrix to understand how the grades are assigned based on the combinations of **Size**, **Title**, and **Location**.

Lead grades expansion

2 Proposal for updates with a point system

Point System

To systematize this, let's assign numerical values to each level:

- **Strong**: 3 points
- **Medium**: 2 points
- **Weak**: 1 point

Now, calculate the total points for each combination:

- **Grade A**: 9 points (3+3+3)
- **Grade B**: 8-7 points
- **Grade C**: 7-6 points
- **Grade D**: 6-5 points
- **Grade F**: 5-3 points

Lead grades expansion

3 New grading matrix

Updated Point System

With four factors, the total possible points range from **4** (all Weak) to **12** (all Strong).

- **Strong**: 3 points
- **Medium**: 2 points
- **Weak**: 1 point

Adjusted Grade Thresholds

We'll adjust the grade thresholds proportionally:

- **Grade A**: 12 points (all Strong)
- **Grade B**: 11-10 points
- **Grade C**: 9-8 points
- **Grade D**: 7-6 points
- **Grade F**: 5-4 points

Lead grades expansion

4 Implementation steps and considerations

Implementation Steps

1. **Assign Numerical Values**: Use the point system above to quantify each factor.
2. **Calculate Total Points**: For each lead, sum up the points from all four factors.
3. **Assign Grades**: Use the adjuste
points.
4. **Create the New Matrix**: Docum

Considerations

- **Equal Weighting**: This method assumes all factors are equally important. If certain factors are more critical (e.g., Company Revenue is more important than Location), you can adjust the point values or weights accordingly.
- **Threshold Adjustments**: Depending on your business needs, you may want to adjust the grade thresholds to be more lenient or strict.

Next Steps

- **Review and Customize**: Examine the new grading matrix and adjust it to fit your specific requirements.
- **Test the Matrix**: Apply the new grading system to a sample of leads to ensure it accurately reflects lead quality.
- **Adjust as Needed**: Based on testing, you might find that certain combinations should be graded differently. Feel free to tweak the point assignments or thresholds.

5 core capabilities

of leveraging AI for the GTM teams

AI RESEARCHER

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AI JEFF

Guardrails & words of caution

This is new and we (and AI) are still learning.

✓ Trust but verify!

- Add human review to each step (particularly if anything is going external)

✓ Ensure your data is AI ready

- How do you analyze 10 industry fields?

✓ Fine tune your AI

- RAG (retrieval augmented generation)
- Train your AI

Next Steps

- Get comfortable with AI – know what it does well and what it doesn't!
- Find ways to incorporate AI into your work and workflows, it's going to be there before you know it (if it isn't already)
- Test it out! (⌥ + space)

If you only learned three things from this session...

1. Think outside of the (content generation) box
2. Just get started: We're all just experimenting
3. AI is here to help