# AI Implementation Guide for Lifecycle Marketing

Step-by-step blueprint for planning, piloting, and scaling AI across campaigns, journeys, and lead magnets.

**Persona:** Lifecycle Marketers and RevOps Leaders

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## What's inside

- **Strategy brief** covering AI business cases for lifecycle, expansion, and passive revenue motions.
- **Integration workbook** that maps data sources, orchestration tools, and AI services with dependency checklists.
- **Pilot playbook** for selecting use cases, scoping MVPs, and codifying guardrails before rollout.
- **Change management kit** (communications, enablement, KPI plan) so teams adopt the workflows you build.

## Implementation phases

### Phase 1 – Discovery & Prioritization

- Interview template for Marketing, RevOps, Success, and Product leads.
- Scoring model that ranks use cases by impact, effort, and sponsor appetite.
- Stakeholder map + approval plan so you secure exec support early.

### Phase 2 – Architecture & Data Readiness

- Inventory worksheet for CRM, product, support, and web signals with freshness + quality scoring.
- Integration diagrams showing how to route data into SFMC/Braze/Iterable and back into AI copilots.
- Compliance + security review prompts to align Legal and IT.

### Phase 3 – Pilot Execution

- Sprint template (aimed at 4–6 weeks) with backlog items, QA scripts, and AI prompt scaffolding.
- "Definition of ready/done" checklist tuned for AI-powered journeys.
- Metrics tracker capturing lift, efficiency gains, and sponsor pipeline.

### Phase 4 – Scale & Monetize

- Governance playbook to hand off ownership to RevOps or managed services like Automation Flight Deck.
- Passive Revenue Lab extension plan so pilots evolve into sellable lead magnets/kits.
- Post-launch review deck format so leadership can green-light the next wave.

## How to apply the guide

1. **Kickoff workshop** – use the discovery template to align on goals and gather inputs in a single session.
2. **Fill the workbook** – document current state, data readiness, and system constraints.
3. **Select 1–2 pilots** – run the prioritization model, choose sponsors, and move into the sprint plan.
4. **Deploy + review** – execute the pilot, collect KPIs, and decide whether to scale, monetize, or pivot.

Every section links back to editable Google Docs/Sheets so the guide becomes your operating system for AI implementation—not just a PDF.***

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