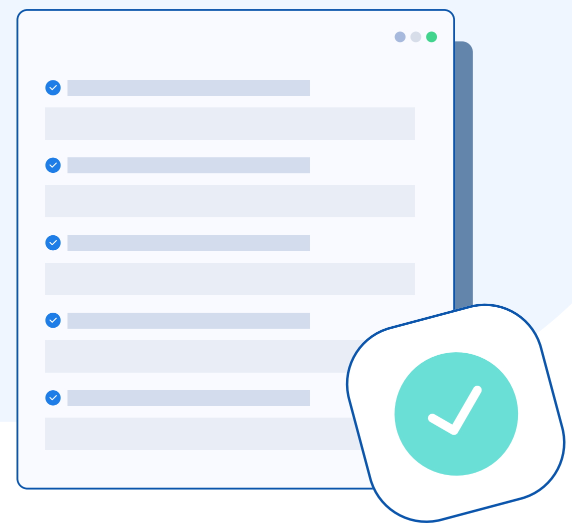
WebFX

Marketing AI ROI checklist



How to use this checklist:

- Treat each phase as a gate. Don't move forward until the "Exit criteria" boxes are checked.
- Assign an **owner** and a **due date** for every step.
- Keep all artifacts (baselines, goal statements, cost log, pilot readout) in one shared folder.

Project name:		**Team/department:**	
Executive sponsor:		**Program owner:**	

Primary goal type: ☐ Revenue/pipeline ☐ Performance ☐ Efficiency ☐ Quality ☐ CX

Your 3-point AI ROI checklist (fast scan)

1. Problem-first (not tool-first)

- ☐ We documented **one measurable problem** to solve first
- ☐ We captured **baseline performance + cost + time** for the workflow
- ☐ We can explain the project in one sentence:
  "We're using AI to ______________ so we can improve ______________ by ______________ in _____ days."

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2. ROI-ready from day one

- ☐ We set **one primary KPI + 2–3 supporting KPIs** with a time frame
- ☐ We defined **how we'll measure** (sources of truth + reporting cadence)
- ☐ We're tracking **all AI costs** (tooling + people time + integration + training)

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3. Scale only what's proven

- ☐ We ran a controlled pilot with clear success criteria
- ☐ We have a pilot readout that shows what changed and why
- ☐ We have a scale plan (what expands next, what stops, what needs audits)

Part 1: Lay the foundation for your AI marketing strategy

1. Identify key issues (baseline + problem selection)

Goal: Pick a single high-impact problem with clean before/after measurement.

Checklist

- [ ] Pull baseline metrics for the target workflow (last 30/60/90 days)
- [ ] Document current workflow steps (what happens, who does it, tools used)
- [ ] Capture current costs:
  - [ ] Labor time per cycle (minutes/hours)
  - [ ] Media/spend costs (if relevant)
  - [ ] Production costs (creative, dev, freelance, etc.)
- [ ] Compare to:
  - [ ] Historical performance (same period last quarter/year)
  - [ ] Internal benchmarks (best-performing team/campaign)
  - [ ] Any trusted external benchmark (optional)
- [ ] Choose one primary problem to solve first:
  - [ ] Wasted spend / poor efficiency
  - [ ] Conversion rate bottleneck
  - [ ] Slow speed-to-launch
  - [ ] Lead quality issues
  - [ ] Attribution/reporting gaps
  - [ ] High revision/QA burden

Key steps to follow

- Define the "moment of pain": Where exactly does performance or efficiency break down?
- Confirm the baseline is trustworthy (no tracking gaps, clean definitions).
- Write a one-sentence problem statement:
  "Right now, ____________________ is causing ____________________, resulting in ____________________."

Notes / baseline values

Baseline metric(s): ____________________

Data sources: ____________________

Known tracking gaps: ____________________

Exit criteria

- [ ] Baseline captured and stored
- [ ] One problem selected and agreed by sponsor

2. Define goals and objectives (targets you can defend)

Goal: Set time-bound outcomes tied to business impact.

Checklist

- [ ] Choose one primary KPI (the "headline" outcome)
- [ ] Choose 2–3 supporting KPIs (to explain why the primary KPI moved)
- [ ] Set a clear time frame: 30 days 60 days 90 days Other: _____
- [ ] Define success in plain language (no vague "improve")
- [ ] Document reporting rules (cadence + stakeholders)

Key steps to follow

- Use this format: **Baseline + target + time frame + source of truth**
- Confirm you can measure the KPI in your CRM/analytics with consistent definitions.
- Align early with leadership on what counts as "proof."

Goal statement template

- Primary KPI goal: "Increase/decrease ______________ from ___ to ___ by ________ (date), measured in ______________."
- Supporting KPIs: 1) ____________________ 2) ____________________ 3) ____________________

Exit criteria

- [ ] Goal statement documented (baseline + target + time frame)
- [ ] Measurement source of truth confirmed

3. Assess readiness (data + stack + process + team)

Goal: Prevent pilots from failing due to messy data or unclear ownership.

Checklist

Data readiness

- [ ] Data is accurate, consistent, accessible, and secure for this use case
- [ ] Sensitive data rules defined (what is allowed in prompts/tools)

Tech stack fit

- [ ] AI workflow fits current stack (CRM, marketing automation, analytics)
- [ ] Integration needs documented (what connects to what)

Process readiness

- [ ] AI fits into a specific workflow step (not "everywhere at once")
- [ ] "Done" definition and QA path documented

Team readiness

- [ ] Owner assigned
- [ ] Reviewers assigned (brand/compliance/analytics if needed)
- [ ] Training time budgeted

Key steps to follow

- Identify the minimum viable data + systems required for a clean pilot.
- Flag blockers now (tracking, access, permissions, compliance, resourcing).
- Decide what must be fixed before launch vs. after pilot.

Exit criteria

- [ ] Readiness blockers logged with owners + due dates
- [ ] Pilot is feasible without major rebuilds

Part 2: Set and implement your AI marketing strategy

1. Identify opportunities (pick workflows that will show ROI fast)

Goal: Choose AI-supported workflows that are repeatable and measurable.

Checklist

- [ ] List candidate workflows (5–10)
- [ ] Score each workflow (1–5) on:
  - [ ] Workflow volume (how often it happens)
  - [ ] Business impact (revenue, conversions, lead quality, CX)
  - [ ] Measurement clarity (clean before/after tracking)
  - [ ] Implementation effort (low disruption to test)
- [ ] Select your first 1–2 use cases (not more)

Key steps to follow

- Start where time savings or performance lift is easiest to isolate.
- Avoid "big platform" rollouts until you have proof from a narrow pilot.
- If two options tie, pick the one with **cleaner measurement.**

Exit criteria

- [ ] Top use case selected and documented with scoring rationale

2. Establish clear protocols (quality + compliance + trust)

Goal: Create guardrails so outputs are safe, accurate, and on-brand.

Checklist

- [ ] Brand and voice rules:
  - [ ] What AI can draft
  - [ ] What must be human-written or approved
- [ ] Data privacy rules:
  - [ ] Allowed data types
  - [ ] Prohibited data types
- [ ] Quality checks:
  - [ ] Accuracy verification steps
  - [ ] Source/claims validation rules
  - [ ] Required reviews before publish/launch
- [ ] Ownership:
  - [ ] Who approves outputs
  - [ ] Who maintains prompts/workflows
  - [ ] Who audits results

Key steps to follow

- Write protocols short enough to follow daily.
- Create one "QA checklist" that applies to every output.
- Define escalation paths for mistakes (what happens when AI is wrong).

Exit criteria

- [ ] Protocol doc shared with the team
- [ ] QA owner and approver named

3. Invest in high-impact tools (buy for the workflow, not the hype)

Goal: Choose tools that match the specific workflow and measurement needs.

Checklist

- [ ] Tool requirements written (must-have vs. nice-to-have)
- [ ] Integration needs documented
- [ ] Total cost tracking started (log everything):
  - [ ] Licenses/subscriptions
  - [ ] Implementation/integration time
  - [ ] Training time
  - [ ] Ongoing maintenance/ops time
- [ ] Reporting impact confirmed (can you attribute outcomes?)

Key steps to follow

- Prioritize tools that reduce friction in your current process.
- Confirm data access, permissions, and security early.
- Track costs from day one so ROI is defensible later.

Exit criteria

- [ ] Tool selection documented + cost log created

4. Prepare personnel and data infrastructure (make adoption repeatable)

Goal: Reduce "friction costs" that quietly destroy ROI.

Checklist

- [ ] Role-based training completed for pilot team
- [ ] Workflow documentation written (step-by-step)
- [ ] Data cleanup completed for pilot use case (minimum viable)
- [ ] Measurement setup verified (dashboards, CRM fields, goals/events)

Key steps to follow

- Train people on their workflow, not generic AI concepts.
- Document prompts, templates, and review steps so results are consistent.
- Treat training + data cleanup time as part of ROI inputs.

Exit criteria

- [ ] Team can run the workflow without bottlenecks
- [ ] Measurement is live and tested

5. Launch pilot projects (controlled proof, not chaos)

Goal: Run a tight pilot that produces clean, believable results.

Checklist

Pilot scope

- [ ] One workflow
- [ ] One team (or segment)
- [ ] Defined timeframe: _____ days

Success criteria

- [ ] Primary KPI target: ________________
- [ ] Supporting KPI targets: ________________

Workflow integration

- [ ] Outputs fit existing tools (CRM/automation/ads/content ops)

Feedback loop

- [ ] Checkpoints scheduled (weekly or biweekly)
- [ ] Iterations documented (prompt/process changes)

Key steps to follow

- Keep the pilot small enough to isolate impact.
- Log what changed (prompts, review steps, tool settings) so you can replicate it.
- Capture qualitative feedback (what slowed people down, what improved speed).

Pilot readout (required)

What we tested: ________________

What changed in the workflow: ________________

Results vs. baseline: ________________

Recommendation: [ ] Scale [ ] Iterate [ ] Stop

Exit criteria

- [ ] Pilot results documented and shared with stakeholders

Part 3: Measure results and scale successful projects

1. Track key metrics (consistent, time-bound reporting)

Goal: Monitor results without overreacting to short-term noise.

Checklist

- ☐ Tracking window defined: ☐ 30 days ☐ 60 days ☐ 90 days
- ☐ Reporting cadence set: ☐ Weekly ☐ Biweekly ☐ Monthly
- ☐ Use rolling averages where possible
- ☐ Metrics aligned to the original goal
- ☐ Metrics grouped (pick what applies):
  - ☐ Financial (CPL, CPA, ROAS, CLV, etc.)
  - ☐ Revenue/pipeline (leads, MQLs, SQLs, pipeline, sales)
  - ☐ Engagement (CTR, conversion steps, retention signals)
  - ☐ Efficiency (time saved, speed-to-launch, volume)
  - ☐ Strategic (competitive benchmarks, speed-to-market)

Key steps to follow

- Keep one primary KPI as the headline.
- Use supporting KPIs to explain root causes, not to distract.

Exit criteria

- ☐ Dashboard/report is consistent and repeatable

2. Calculate ROI (make it defensible)

Goal: Translate results into a number leadership can use.

ROI formula: ROI % = (Revenue gains + cost savings − total AI costs) / total AI costs × 100%

Checklist

- ☐ Time frame defined (same as pilot/measurement window)
- ☐ Revenue gains defined and sourced from: _______________
- ☐ Cost savings defined (what was saved and how it maps to value)
- ☐ Total AI costs include:
  - ☐ Tool costs
  - ☐ Integration costs
  - ☐ Training + documentation time
  - ☐ Ongoing ops time
- ☐ Attribution approach documented (as available):
  - ☐ A/B test
  - ☐ Holdout group
  - ☐ Consistent attribution model
  - ☐ "Best available estimate" with assumptions stated

Key steps to follow

- Separate "time saved" from "value created" (and show how saved time turns into output or savings).
- Write down assumptions so stakeholders don't debate them later.

Exit criteria

- ☐ ROI calculation documented with inputs + assumptions

3. Scale the proven winners (expand what worked, not what's trendy)

Goal: Turn one win into a repeatable program.

Checklist

- ☐ Scaling plan defined:
  - ☐ Next team/channel to expand to
  - ☐ What stays identical (workflow, QA, measurement)
  - ☐ What changes (volume, creative, segments)
- ☐ Documentation updated based on pilot learnings
- ☐ Training plan for the next group scheduled
- ☐ Quality safeguards maintained as volume increases

Key steps to follow

- Scale in stages (one expansion at a time).
- Don't expand until you can replicate results predictably.

Exit criteria

- ☐ Scale plan approved + resourced

4. Conduct regular audits (quarterly guardrails)

Goal: Keep performance, compliance, and quality from drifting over time.

Checklist

- ☐ Audit cadence set: ☐ Monthly ☐ Quarterly
- ☐ Performance review:
  - ☐ KPI trends vs. baseline and targets
  - ☐ Budget and cost review
  - ☐ What to double down on vs. stop
- ☐ Governance review:
  - ☐ Data privacy compliance check
  - ☐ Quality/accuracy sampling
  - ☐ Brand/voice consistency review
  - ☐ Process adherence (are people following the workflow?)
- ☐ Action plan created with owners + deadlines

Key steps to follow

- Treat audits as optimization, not punishment.
- Make one clear decision per audit: **scale, refine, or stop.**

Exit criteria

- ☐ Audit findings documented + actions assigned

One-page artifact list (what you should have by the end)

- ☐ Baseline + problem statement
- ☐ Goal statement (KPI + targets + timeframe)
- ☐ Readiness checklist + resolved blockers
- ☐ Protocols (brand, privacy, QA, ownership)
- ☐ Cost log (all AI-related inputs)
- ☐ Pilot plan + pilot readout
- ☐ ROI calculation with assumptions
- ☐ Scale plan + audit schedule