A CMO's Planning Guide to Navigating *AI Transformation* in 2024

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# The AI Revolution in Multi-Location Marketing

Artificial intelligence (AI) is no longer a trendy buzzword; it's the bedrock of the marketing landscape.

As we head into 2024, AI's astronomical rise will only grow — especially as B2B and B2C companies globally turn toward AI to support their marketing and sales organizations.

According to one global **McKinsey study**, **75%** of senior marketing and sales executives use machine learning within their departments, and **40%** use generative AI. Furthermore, **9 in 10** commercial leaders expect their organizations to use generative AI "often" over the next two years.

75%
of commercial-leading marketing and sales organizations use machine learning, and
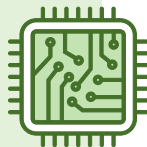
40%
use generative AI solutions
Source: **McKinsey, May 2023**

Multi-location enterprises and their marketing programs likely have the most to gain from this AI transformation. Why? It's simple: a lack of time and resources.

At the local level, store owners or managers are busy running their local businesses. They're not full-time marketers. These human capacity constraints lead to a lack of digital marketing expertise and limited marketing adoption across locations.

Your multi-location enterprise can solve these issues by properly implementing and using AI at both the corporate and local levels. A few multi-location marketers already have!

For many multi-location enterprises, the AI transformation is already underway. We recently surveyed over 300 multi-location marketers to understand how they're adopting AI and their current challenges. Our survey found that:

95%
of marketers believe AI is a transformative technology that will significantly impact marketing.

75%
of marketers have incorporated AI into their marketing technology (MarTech) stack.

THE HIGHS, LOWS, AND "WHOAS" OF AI:
What Multi-Location Marketers Need to Know NOW

SOCi

You can read our white paper, **The Highs Lows, and "Whoas" of AI: What Multi-Location Marketers Need to Know NOW** to dive further into multi-location marketers' sentiment around and use of AI.

DOWNLOAD NOW

About This Guide

It's clear that AI's transformative power is already transforming the future of multi-location marketing — those unwilling to adapt risk falling behind.

That's why we created this guide.

> This workable guide is for CMOs and other marketing leaders who want to tactfully plan and implement AI into their multi-location marketing strategy in 2024 and beyond.

You can use the insights and strategies outlined in this guide to:

1st Assess your knowledge of AI and identify areas where your brand can leverage it

2nd Prepare your marketing team for initial or further AI integrations

3rd Execute your AI-driven multi-location marketing strategy

4th Measure, test, and prove ROI

5th Look to the future of AI with the right partner

Ready to start transforming your multi-location marketing strategy with AI?

Let's get started!
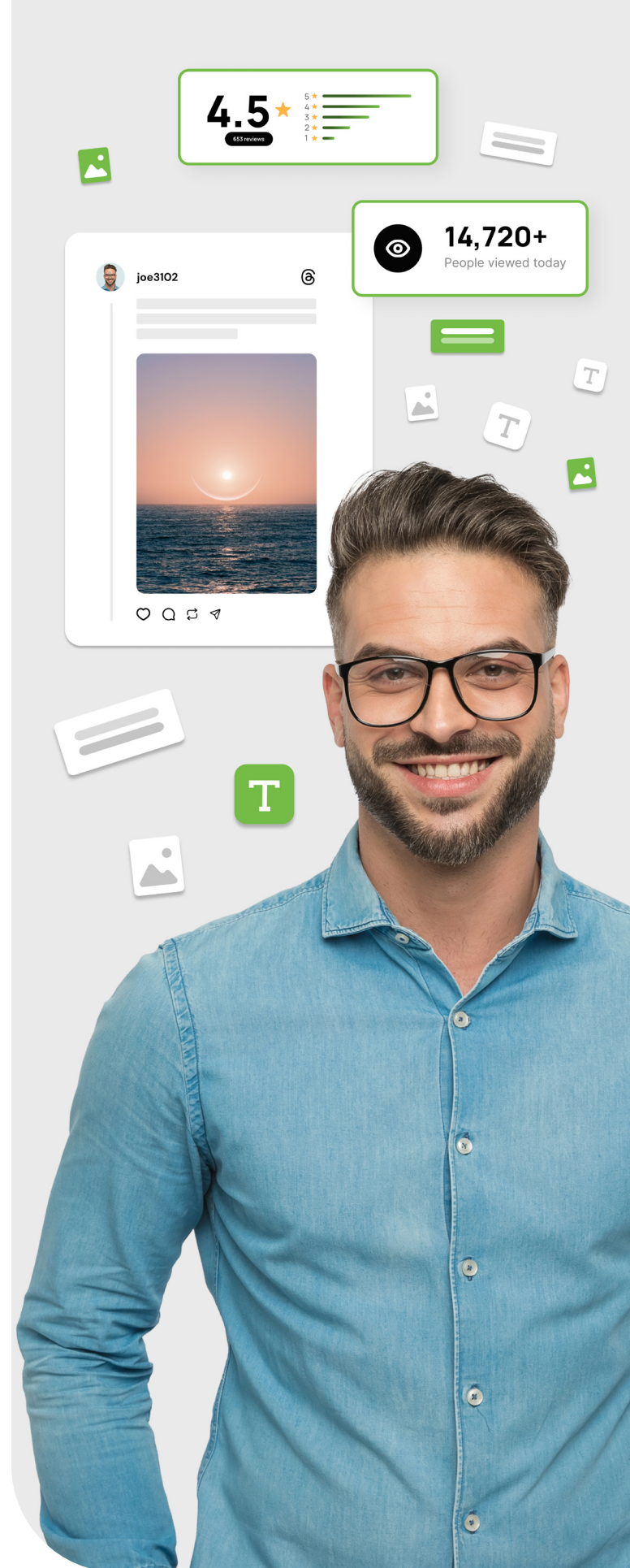
1 Build Your AI Foundation With Education

Our survey found that **82%** of multi-location marketers are already familiar with generative AI tools, and **65%** have incorporated them into their marketing tech (MarTech) stack. Additionally, **McKinsey studied** over 400 AI use cases and found marketing and sales can benefit most from AI solutions in these areas.

Data volume: Frequent digital interactions between businesses and customers generate large data sets for AI to tap into and make recommendations.

Product assortment: Using a slew of data, retailers can use AI applications to heighten product placement and inventory per store.

Hyper-personalization: AI can analyze user data to help companies better understand customer preferences and create highly personalized experiences across numerous touchpoints.

As you can see, there's a lot of excitement for and use cases involving AI solutions. However, before choosing various AI solutions, you and your marketing leaders must understand the different types of AI and how they work.

A basic understanding of AI will enhance your ability to make decisions about AI software and give you the tools and credibility when educating or training fellow team members and customers about AI's use cases.

> "Of all a company's functions, **marketing has perhaps the most to gain** from artificial intelligence. Marketing's core activities are understanding customer needs, matching them to products and services, and persuading people to buy."
>
> Source: **Harvard Business Review, July 2021**

To begin your AI education, read our articles, **The Fundamentals of AI: For Multi-Location Marketers** and **The Basic Components and Branches of Artificial Intelligence**.

There are also endless resources available to build your knowledge around AI. For instance, consider the **Marketing AI Institute**, which offers paid courses, or find an expert on the topic, like **Shelly Palmer**, and follow their AI updates.

We also recommend familiarizing yourself with various government regulations and privacy policies. Here are a few of the most essential websites worth visiting and reviewing:

- **General Data Protection Regulation (GDPR)**

- **California Consumer Privacy Act**

- **Federal Trade Commission (FTC) Online Advertising and Marketing Business Guidance**

- **European Commission's AI Policies**

2 Assess Your AI Readiness

Identify Common Barriers to AI Implementation

When kicking off your AI marketing strategy, you must determine common barriers for your team. AI solutions aren't magic wands. Is there a lack of AI knowledge or employee bandwidth and training?

Consider your team's greatest needs and which AI solutions can best support them.

To best assess your AI readiness, ask or survey your marketing team with these vital questions:

- Which repetitive tasks take up the most time?
- Where do you often get stuck in the creative process?
- Are there large data sets you want to activate or use more?
- Where are you spending the most time searching internally on knowledge bases or externally (search engines) for information?

Now, what about evaluating AI solutions? When you analyze any AI solution, consider these three questions:

What will this software allow us to do that we can't already?

What difference will it make for our department or business?

How will our team measure that difference?

Embrace the AI Change and Be An Early Adopter

Now, more than ever, embracing AI within your marketing and sales departments is imperative. Our research found that nearly **7 in 10** marketers believe that marketers leveraging AI will replace those that don't.

69%
Sixty-nine percent of multi-location marketers believe that marketers leveraging AI will replace those that don't.

Help your teams embrace AI by knowing how AI solutions operate and their expected impact on your business. You want to be an earlier adopter of AI technology because as more of the industry adopts AI software, the performance baseline shifts. Be a leader setting the baseline, not playing catch up.

Learn From Brands Who Have Successfully Embraced AI

If you or your fellow executives and marketers are hesitant about the impact of AI on your business, know that several major brands have already seen significant success from implementing AI into their corporations, as seen in the examples to the right.

Verlo Mattress, a leading manufacturer and retailer of mattresses, wanted more direct account support for their franchisee owners and staff.

After partnering with SOCi and utilizing SOCi **Genius Reviews** — which integrates with GPT-4 (a generative AI solution) to respond to reviews — Verlo raised their review response rate to **97%** and decreased their review response time by **29 hours** in one quarter.

verlo

Vanguard, one of the world's biggest investment firms, with $7 trillion under management, used an AI language platform to personalize its ad messaging. The AI-generated messages increased the click-through rate by nearly **16% more** than the control message.

To be like these innovative and AI-driven companies, you need to get your data in order.

Vanguard®

3 Get Your Data Ready

You're likely a proponent of the saying "data is king." AI — particularly integrated applications like natural language processing or machine learning — needs clean, high-quality data. Thus, cleaning and organizing your data before using it in various AI software is critical.

Good data is the foundation of any successful AI marketing strategy. It starts with a thorough analysis of your data sources and technology infrastructure.

For instance, ensure your APIs (Application Programming Interfaces) — which facilitate the communication and information between software systems — run smoothly. For example, SOCi's platform directly connects with **Apple Business Connect** via an API, so businesses can easily update any location's information in Apple Maps.

Right now, is a great time to test and learn your AI solutions with limited data. This will set up your long-term success. In the future, you'll need to integrate, consolidate, and train your AI on your own customer data, insights, and performance.

Balancing first and third-party data is also crucial, as over-reliance on the latter can leave you vulnerable to external software changes and government-imposed data regulations.

> ## Garbage in, garbage out ”
> "The biggest risk to AI is data poisoning because bad quality data will not only create a bad output but train the model to go totally off the chart for all future computation and predictions."
> Source: **Forbes, October 2023**

When organizing your data, you must:

☐ Analyze data sources and tech infrastructure:
  - Create a comprehensive data collection, storage, and management strategy
  - Collect clean, reliable data that removes duplicates, missing values, and outliers
  - Integrate data from various sources into one single repository

☐ Ensure the right mixture of first and third-party data; the more first-party data, the better

☐ Verify your API connections by sending sample requests between software systems and checking responses for accuracy and consistency

☐ Certify compliance with data protection regulations like GDPR or CCPA

☐ _____

☐ _____

4 Turn Teams Into AI Marketing Masters

Preparing and training your marketing team to use new AI technologies effectively is crucial for leveraging the full potential of these tools.

Our previously mentioned marketing **survey** discovered that many marketers feel overwhelmed by the pace of AI and aren't receiving the proper training and education.

70%
of marketers feel inundated by the current pace of AI development and its incorporation into their marketing strategies.
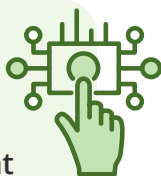
39%
of marketers have received education or formal training about AI and its use cases, and

19%
were undergoing training.

This lack of education and training is likely one reason why **44%** of marketers believe introducing new AI tools tends to confuse users. To help ensure an easier path to adopting AI, use this checklist to educate and train your marketing team.

☐ Survey your marketers to understand knowledge and skill gaps and to see where they need the most support from AI

☐ Breakdown workflows that AI can help automate and incorporate SMART goals to measure the impact

☐ Decide who owns the AI software and outline how marketing roles will incorporate and evolve with AI

☐ Roll out AI training workshops that include hands-on and cross-departmental training

☐ Encourage failure; these are new, ever-evolving tools that take time and practice to master

☐

☐

ON DEMAND

AI and The Future of Multi-Location Marketing

WATCH ON DEMAND

5 Choose the Right AI Solutions

How to Vet AI Solutions

Selecting new AI solutions can feel daunting. Remember, you've done it before. It's like choosing any of your previous marketing tech (MarTech) tools. Vet each one carefully and weigh what matters most to you: the cost, functionality, customer support, etc.

There are a few specific factors to consider when vetting AI solutions.

Considerations When Vetting AI Solutions

Consideration	Questions to Ask
Data Integration	• How well does it integrate with your existing data sources? • Can it handle structured and unstructured data?
Customization	• Can it tailor algorithms and models to your industry? • Does the tool allow for customizations based on location or industry?
Scalability	• What are the company's future growth plans and tech advancements? • Can it support businesses with numerous locations?
Data Privacy and Security	• How does it handle customer data, and is it compliant with regulations? • How secure is the solution against data breaches and cyber threats?
Support and Training	• Does the vendor offer support, training, and documentation? • Are there different tiers of customer support? If so, what do they include?

How to Choose Specific AI Solutions by Category

There are also considerations you must make regarding different AI solutions. The table below summarizes various AI solution categories and key features and benefits marketers should consider in each one.

AI Software Categories + Features and Benefits to Consider

| AI Solution Category	Features and Benefits
Content Creation	☐ Content recommendations ☐ Enhanced ability to personalize by location ☐ Produces original content that doesn't infringe on copyrighting ☐ Other: _____
Social Media Analytics	☐ Sentiment analysis capabilities ☐ Audience segmentation ☐ Competitor analysis metrics ☐ Improved data reporting and visualization ☐ Other: _____
Predictive Analytics	☐ Forecasting customer behavior ☐ Identifying market trends ☐ Optimizing marketing spend ☐ Real-time recommendations ☐ Continuous churn modeling ☐ Other: _____
Email Marketing Automation	☐ Personalized content recommendations ☐ Automated email marketing campaigns ☐ Lead scoring and nurturing ☐ Improved customer segmentation ☐ Enhanced user engagement ☐ Other: _____
Customer Relationship Management (CRM)	☐ Customer data management ☐ Lead tracking and conversion optimization ☐ Personalized customer communication ☐ Social listening capabilities ☐ Other: _____
Chatbots and AI Assistants	☐ 24/7 customer support ☐ Natural language processing for better user interactions ☐ Reduced response times ☐ Data-driven insights for customer needs ☐ Other: _____

6 # Execute Your AI Marketing Strategy

It's time to combine your ingredients and roll out your AI tools and plans! When rolling out your marketing strategy, you must:

- ☐ Identify areas and projects where AI can make the most significant impact
- ☐ Break down workflows where AI can automate tasks and how you'll keep the human in the loop
- ☐ Define clear roles, responsibilities, and project owners within each AI marketing campaign and strategy
- ☐ Allocate a budget for AI implementation, including software and trainings
- ☐ Select key performance indicators (KPIs) and SMART goals for each AI marketing initiative

Remember, it's essential to keep the **human in the loop** when using AI. AI tools are partners and CoMarketers to your team. Having humans overseeing all AI projects and making edits and adjustments as needed is necessary.

Again, proper training will ensure your marketers know what to look for and when to intervene with AI.
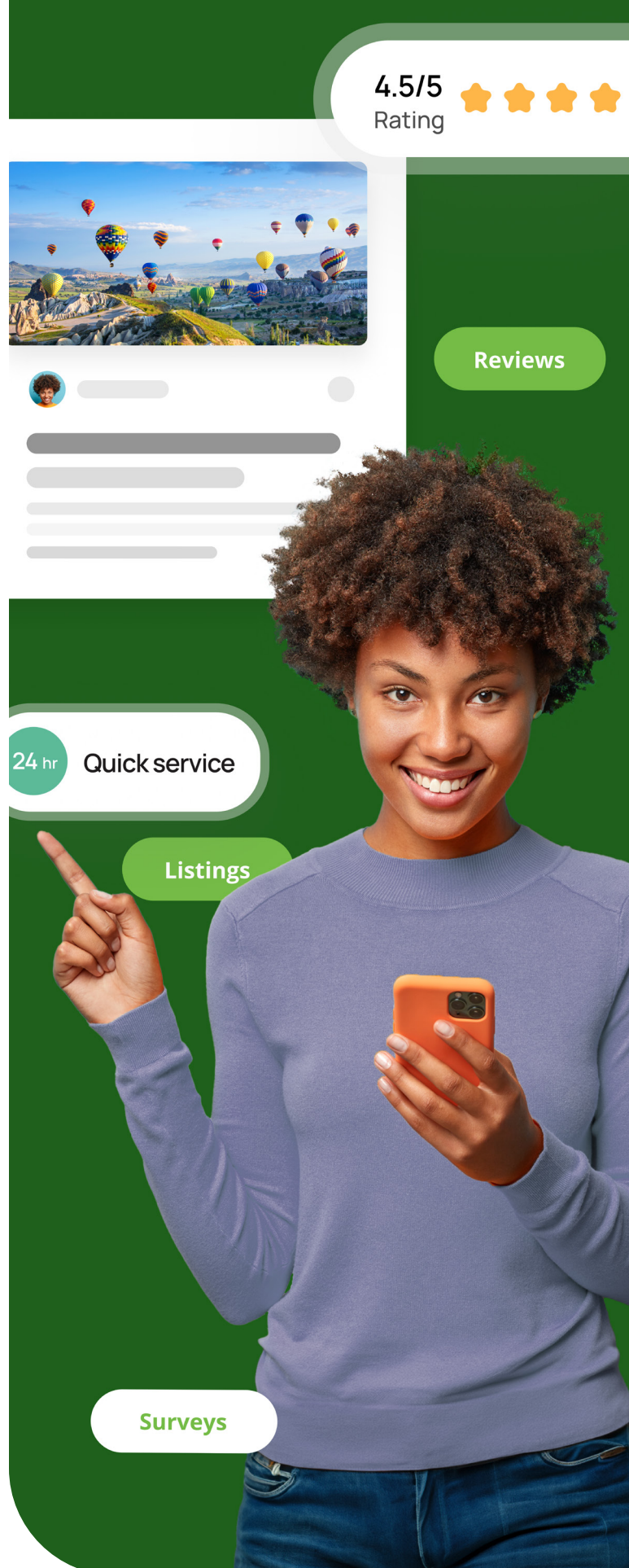
7 Measure and Prove ROI With AI and Continue to Test, Test, Test

Before launching your 2024 multi-location marketing strategy, it's crucial to predetermine your most important metrics and ensure you're measuring those regularly. Quantify your goals to assess each campaign's performance accurately.

Many of your primary marketing KPIs will remain the same. However, with the incorporation of AI solutions, you need to examine each campaign more closely to see how much time your marketers saved and if they delivered quality content.

AI Marketing Goals and Outcomes

Goal / Outcome	How to Measure Success?	Quarterly Pacing
Overall, where do you see the most success?	• Collect feedback and insights from the marketing team, sellers, and customers • Monitor key performance indicators (KPIs) aligned with success criteria	Q1: _____ Q2: _____ Q3: _____ Q4: _____
How are campaigns performing? Underperformers Meeting expectations Overperformers	• Compare campaign performance to predefined benchmarks and goals • Identify specific challenges and reasons for performance • Utilize AI to predict and set new benchmarks	Q1: _____ Q2: _____ Q3: _____ Q4: _____
How do your AI campaigns compare to industry benchmarks and competitors? Underperformers Meeting expectations Overperformers	• Analyze competitor performance and tactics • Conduct benchmarking against industry standards	Q1: _____ Q2: _____ Q3: _____ Q4: _____

Goal / Outcome	How to Measure Success?	Quarterly Pacing
Total time saved on campaigns and projects? Project/campaign: Time saved: Project/campaign: Time saved:	• Track the time saved through AI automation and efficiency • Assign values to time saved for each project or campaign	Q1: _____ Q2: _____ Q3: _____ Q4: _____
Are you testing? Which tests were most successful and why?	• Implement A/B testing and experimentation for campaigns • Utilize AI to analyze test results to make data-driven adjustments	Q1: _____ Q2: _____ Q3: _____ Q4: _____
Where is more training needed?	• Assess the proficiency of your marketing team in AI-related skills • Identify areas where additional training or skill development is required	Q1: _____ Q2: _____ Q3: _____ Q4: _____
Area 1:		Q1: _____ Q2: _____ Q3: _____ Q4: _____
Area 2:		Q1: _____ Q2: _____ Q3: _____ Q4: _____
Where are you on budgets?	• Evaluate the budget utilization for AI marketing initiatives • Compare actual spending to budgeted amounts	Q1: _____ Q2: _____ Q3: _____ Q4: _____

As always, adjust your marketing strategy based on your performance metrics and changes in technology and markets.
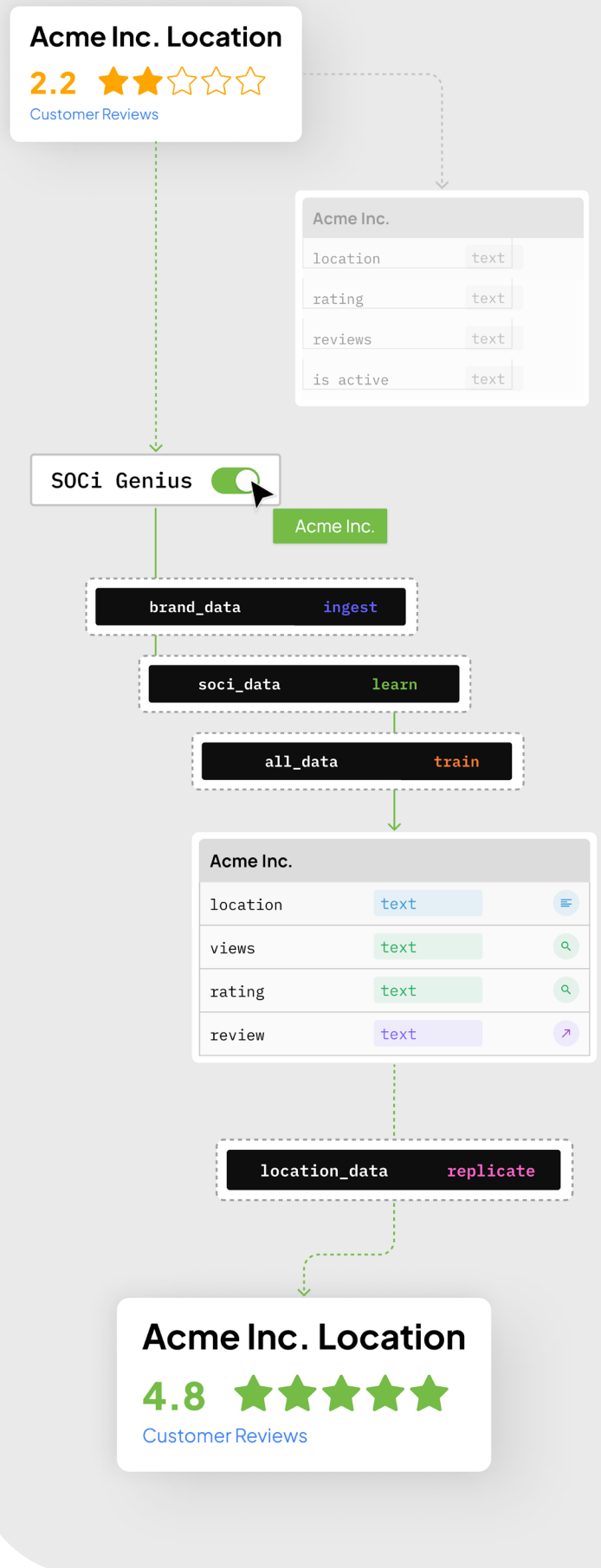
8 Complete Your AI and Data Integration

By now, your team has collected a plethora of data from existing technology vendors and your internal first-party data.

The final phase of your AI transformation journey is fully integrating and consolidating your data into one centralized database. Within this database, your AI can learn and train itself on your data.

For instance, you need to consolidate all of your online reviews, comments, and other engagements from your local listings, local pages, and local social profiles into your database. AI can then analyze these thousands or millions of data points to make precise recommendations for individual stores and your multi-location business.

> Having your own database to train and help your AI learn will be a significant differentiator for multi-location enterprises. It allows you to use AI technology fully and will help you achieve previously unreachable growth and efficiency.

Acme Inc. Location

2.2 ★★☆☆☆
Customer Reviews

Acme Inc.
location	text
rating	text
reviews	text
is active	text

SOCi Genius

Acme Inc.

`brand_data` **ingest**

`soci_data` **learn**

`all_data` **train**

Acme Inc.
location	text	
views	text	
rating	text	
review	text	

`location_data` **replicate**

Acme Inc. Location

4.8 ★★★★★
Customer Reviews

AI and the Future of
Multi-Location Marketing

This guide's insights, tactics, and comprehensive strategy underscore the non-negotiable urgency for your multi-location enterprise to embrace AI's transformative potential. The time for action is now!

At SOCi, we want to help lead your multi-location brand on its AI journey. Not only can we continue to educate and alleviate your fears around the continuous advancements in AI. We've also built our platform for multi-location enterprises embracing AI.

Our CoMarketing Cloud software, **SOCi Genius**, leverages the best-in-class generative AI and machine learning software to help you execute your multi-location marketing strategy at a higher, more efficient level.

Plus, our commitment to AI will keep you apprised about the most recent AI developments.

Not convinced? See what **Ike's Love and Sandwiches** had to say about SOCi's data-backed CoMarketing Cloud.

> "We can pull any slice of data that the operations team wants. This is something that has been helpful to the whole team. We can clearly show how certain stores are performing, and this has allowed us to be more strategic with operational changes that need to be made. This, in turn, has helped us resolve guest issues and improve the overall health of our stores."
>
> **JACQUELINE SMITH, DIRECTOR OF MARKETING AT IKE'S LOVE AND SANDWICHES**
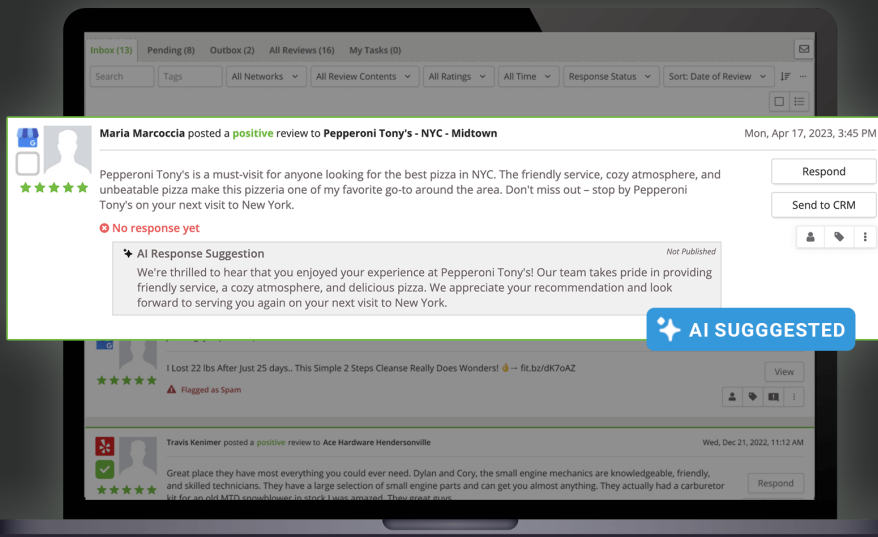
We're ready to get you and your marketing teams learning, deploying, and creating with AI!

REQUEST A DEMO TODAY

To uncover how SOCi can help your brand dominate the AI-driven marketing landscape.

About SOCi

SOCi is the leading CoMarketing Cloud Platform for multi-location enterprises. We empower businesses like Ace Hardware, Jersey Mike's, Kumon, and Ford to automate and scale their marketing efforts across all locations and digital channels in a way that is **brand directed, locally perfected, and data connected.**

Through the use of best-in-class generative AI and machine learning, the SOCi Genius platform provides multi-location enterprises actionable insights and recommendations while automating their most important workflows at scale.

With SOCi, businesses can strengthen their digital presence across local search and social pages while protecting their online reputation, driving improved customer engagement and market leading results.

To learn more about how SOCi can help fuel your localized marketing success, please visit us at **www.meetsoci.com** or message us at **hello@meetsoci.com**.