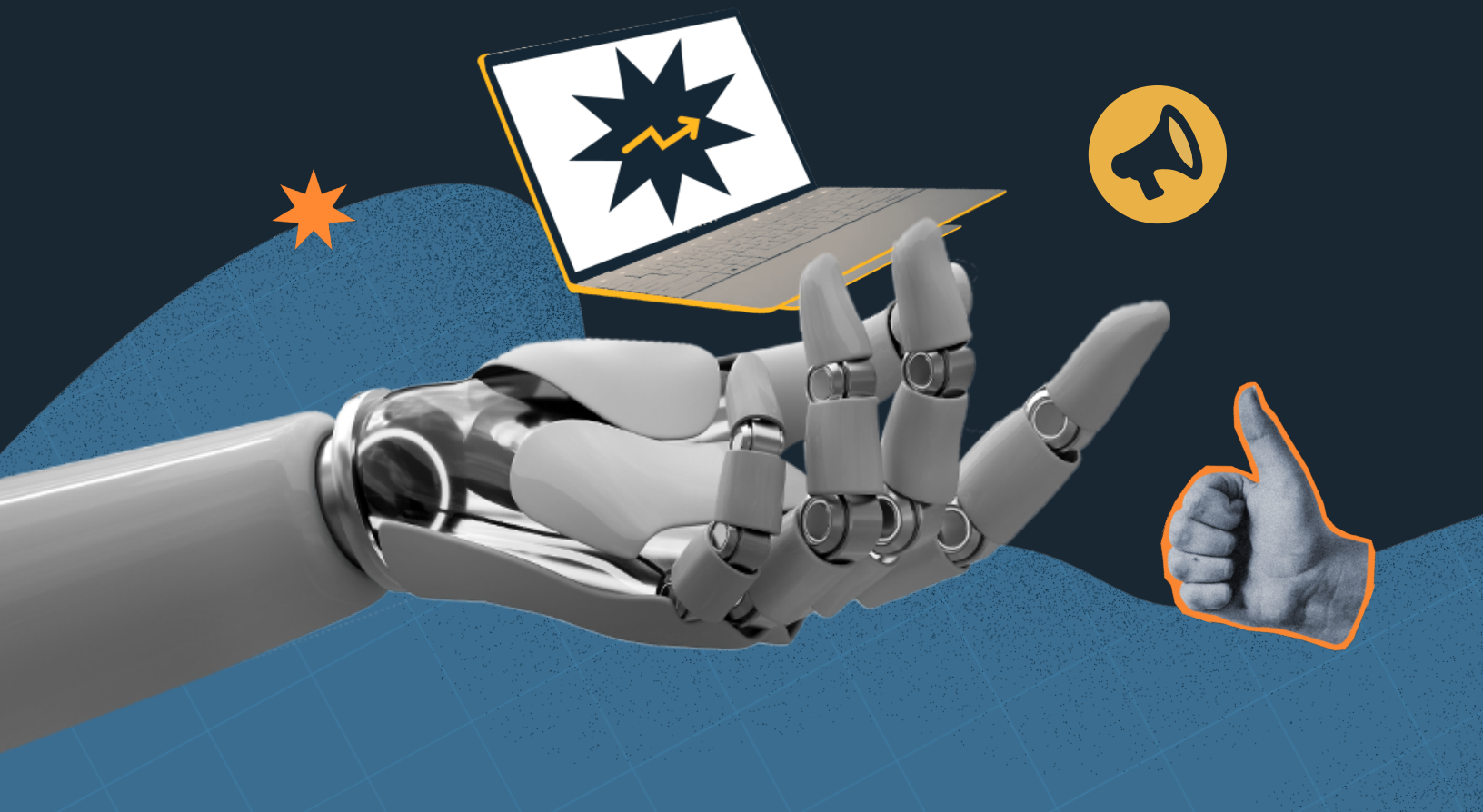
HubSpot

MARKETING against the grain

THE 5 STEP FRAMEWORK TO MASTERING AI IN MARKETING



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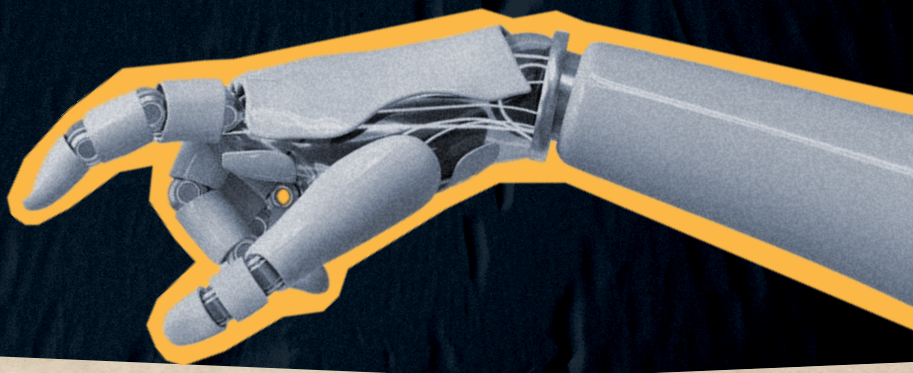

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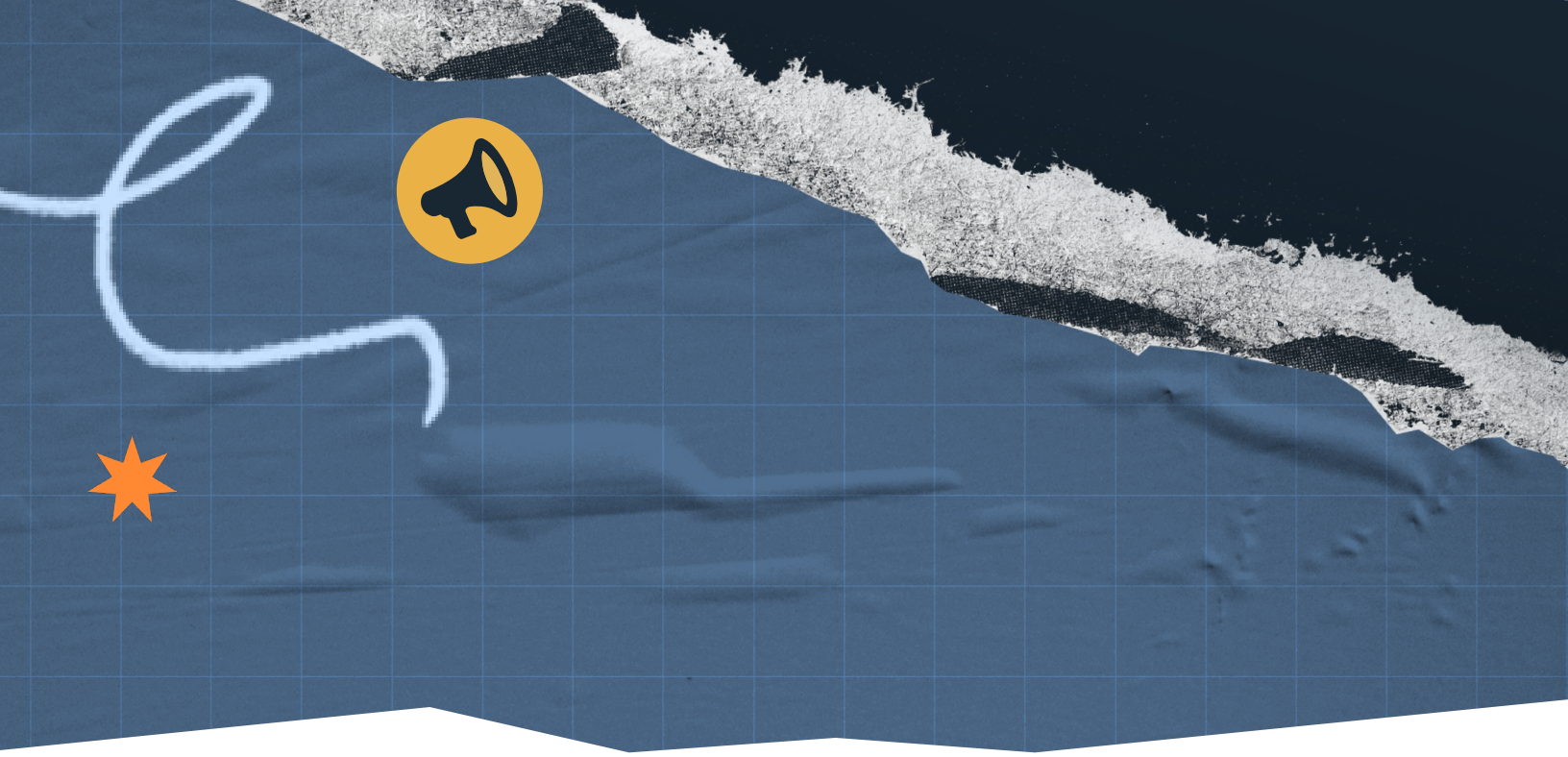


Introduction

AI as a Creative and Strategic Partner in Modern Marketing

Artificial Intelligence (AI) has become one of the most transformative tools in a marketer's arsenal, not just for automating repetitive tasks but for driving creativity, strategic thinking, and meaningful connections with customers. Imagine having a partner that learns from data, adapts to feedback, and helps you identify high-impact opportunities at scale—this is the role AI can play in your marketing. As Kieran Flanagan explains, **"AI is not a copy-and-paste tool; it is an accelerated learning tool."** With AI's support, marketers can experiment faster, gain deeper insights, and dedicate more time to innovative, customer-centered strategies that set their brands apart.

What You'll Find in This Guide

This guide makes AI accessible, actionable, and impactful for marketers at every experience level. Through a clear, five-step framework, you'll learn how to integrate AI into your marketing in ways that enhance both efficiency and creativity. Each step includes practical strategies to help you build more intelligent workflows, develop personalized customer experiences, and leverage AI as a powerful partner in achieving your goals. Here's a quick look at what you'll discover:

Mastering Prompting for AI-Driven Insights
Uncover the art of prompting with simple yet powerful ways to guide AI to produce high-quality outputs tailored to your marketing needs.

Onboarding AI with Context and Brand-Specific Knowledge
Learn how to train AI in your brand's unique voice and values, transforming it into an extension of your team that produces relevant, on-brand content.

Building Templates for Scalable Content Creation
Streamline your content production by creating reusable templates that allow AI to replicate successful formats, maintaining quality and consistency across channels.

Leveraging Virtual Agents for Automation and Efficiency
Discover how AI agents can handle repetitive tasks, freeing up your time for high-level strategy and making your marketing team more agile.

Building Custom Apps with AI Coding
Explore how custom AI apps can tackle complex, multi-functional tasks, from customer segmentation to campaign tracking, empowering you with new insight and flexibility.

Each step is crafted to help you tap into AI's potential as a creative and strategic asset, allowing you to personalize, scale, and innovate confidently. Whether you're new to AI or looking to deepen its role in your strategy, this guide will equip you with the tools and knowledge to take meaningful action.

Step 1

Mastering Prompting for AI-Driven Insights

Prompting is one of the most essential skills for using AI effectively. Think of it like writing a creative brief for a campaign: the more precise your brief, the better your "team"—human or AI—can deliver what you envision. A well-crafted prompt helps AI understand your goals, just like a solid creative brief aligns your team around a campaign's vision.

For marketers, effective prompting allows you to shape AI's responses to produce precisely what you need. This skill will enable you to steer AI toward outputs that align with your objectives and brand voice. With just a few foundational techniques, you can begin crafting prompts that make AI work smarter for your needs.

So, how do you get good at prompting? Kieran Flanagan lets us in on a secret: **"Claude is a much better prompt engineer than most of us. And if you ask Claude to create a prompt for you, it will create a pretty great first attempt."**

AI can suggest starting prompts for you, and by refining these prompts step-by-step, you'll get even closer to the exact response you need.

Ultimately, the effectiveness of AI in your marketing strategy depends on how well you prompt it. The more you develop this skill, the more control you'll have over AI's outputs, ensuring they're accurate and aligned with your unique brand and goals.

> "How do I become a master of AI?... And it always comes back to prompting, prompting, prompting."
>
> **Kieran Flanagan**
> SVP, Marketing, HubSpot

Best Practices for Effective Prompting

Mastering prompting is critical to maximizing AI in your marketing strategy. Here are some best practices to start developing this skill:

Be Clear and Specific

The more clarity you provide in your prompt, the more likely the AI will deliver the desired output. Avoid vague questions or instructions; define what you're looking for.

- Example: Rather than asking for "ideas for a blog post," try specifying "Generate three blog post ideas on how AI enhances personalized marketing experiences for B2B companies."

Provide Context

AI models work best when they have enough information to understand your needs. Offering context—such as your target audience or the tone you're aiming for—can help AI tailor its response.

- Example: "Write a headline and introductory paragraph for an email promoting our lead scoring tool. The tone should be insightful yet straightforward, aimed at sales and marketing managers who want to streamline their lead qualification process."

Refine with the Rule of Five

When prompting, don't settle for the first response. Often, the best results come from a process of refinement. Start with an initial prompt and then build on the response with follow-up prompts. Try refining your prompts five times to explore different angles, adjust tone, or dive deeper.

For a practical walk-through of this technique, watch the video, “Use ChatGPT to 10X Your Following on LinkedIn,” where Kieran and Kipp discuss how AI prompts can boost LinkedIn engagement and improve content creation. They cover key insights such as:

- **Why refinement matters**: Adjusting prompts in stages can turn AI from a basic responder into a content enhancer.
- **The importance of clear examples and context:** How well-chosen examples guide AI to produce more tailored and impactful responses.
- **The role of human oversight:** AI’s strengths and limitations underscore the value of an iterative process to refine and verify outputs for accuracy and relevance.

Watching this video will help you see the Rule of Five in action, giving you concrete examples of how to refine AI prompts effectively. Whether you’re crafting LinkedIn posts, ad copy, or email intros, this approach helps you fine-tune AI outputs for more precise, more engaging content.

Step 2

Onboarding AI with Context and Brand-Specific Knowledge

To get the best results from AI, treat it like a junior employee who's just joined your team. Like onboarding a new team member, effective AI onboarding involves introducing it to your brand's unique voice, values, and expectations. With proper guidance, AI can become a seamless extension of your team, producing consistent and relevant outputs aligned with your brand.

As Kieran Flanagan explains, **"Usually your results with AI are a reflection of you as a manager of how you are managing that AI assistant. If you do not set the context or teach the AI how to do a role, then it will not succeed."** Setting this context early means AI will be better equipped to deliver outputs that fit naturally within your brand's style and standards.

> "When you force yourself to document it in real clarity, you get clarity on the work you're doing, and then your employees, your humans, and your AI can go with that clarity."
>
> **Kipp Bodnar**
> Chief Marketing Officer, HubSpot

Case Study

Klarna's Success with AI-Driven Customer Support

Effective AI onboarding can make all the difference, as Klarna discovered when they transformed their customer support with more straightforward guidelines, enabling their AI to deliver consistent, high-quality service at scale.

Problem

Klarna initially needed help with implementing AI in its customer support function. Despite having capable AI models, their early attempts were unsuccessful because the AI needed more proper guidance. The root cause? Klarna's onboarding documentation didn't clearly define the standards for quality interactions, making it difficult for AI to understand what "good" support looked like.

Solution

Klarna refined its onboarding documentation to address this, precisely the customer support guidelines. By rewriting these onboarding docs, Klarna provided the AI with a clear standard for successful interactions, enabling it to replicate better the quality expected from human support agents.

Results

With improved onboarding documentation, Klarna's AI-driven customer support scaled to operate with the equivalent impact of 700 support agents. This change empowered Klarna to maintain consistent, high-quality interactions with customers on a larger scale, demonstrating the value of thorough AI onboarding.

Key Metric: Klarna's enhanced onboarding documentation led to AI capabilities equivalent to the work of 700 support agents.

How to Teach AI Your Brand Voice

To onboard AI effectively, create a **brand style guide specifically for AI**. This guide should serve as a roadmap for AI, detailing the brand's tone, preferred language, and examples of "good" and "bad" outputs. Here's a simple framework to get started:

Define Brand Tone and Style

Outline the tone (e.g., friendly, professional, witty) and style (e.g., concise, detailed) representing your brand in every piece of content.

- *Example*: "Use a warm, conversational tone in customer support responses, similar to how you'd help a friend."

Provide Examples of On-Brand and Off-Brand Responses

Include specific examples of responses that match your brand's standards and those that don't. This will help AI distinguish between content that aligns with your brand and content that misses the mark.

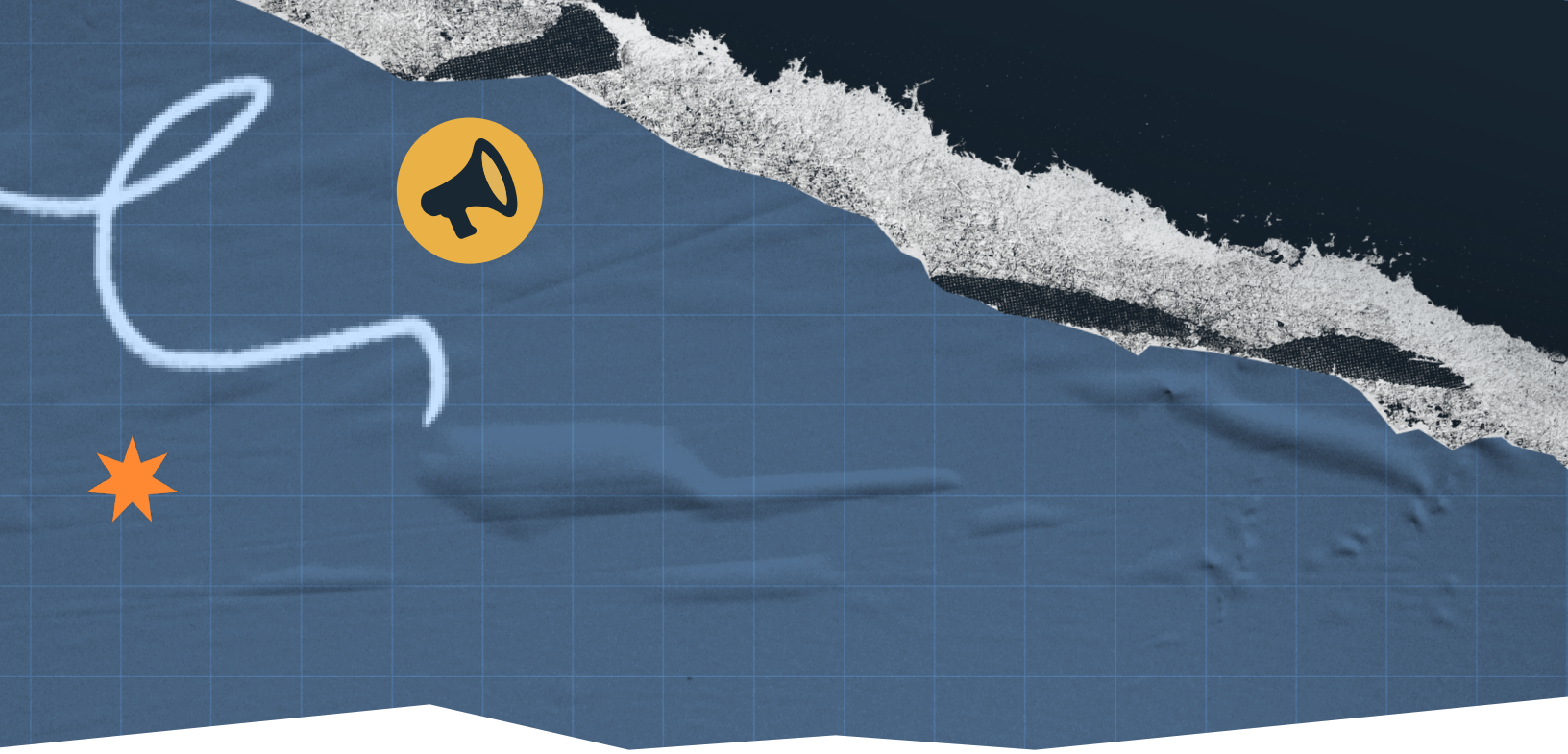
- *Good Example*: "We're here to help! Could you please provide a bit more detail about your issue?"
- *Bad Example*: "Please state your issue."

Identify Use Cases Where Brand Voice is Essential

Outline critical areas where your brand's unique voice matters most, such as customer support interactions or branded content creation. Clarity and brand alignment in AI outputs are valuable for a consistent customer experience in these scenarios.

"I believe in the future, what we are going to see in B2B companies internally is technical writing teams who can document and process what "good" looks like for every singular role because that is actually how we're going to teach the AI agents to get better at the thing we're asking them to do."

Kipp Bodnar
Chief Marketing Officer, HubSpot



Step 3

Building Templates for Scalable Content Creation

Templates are powerful tools for marketers looking to scale content efficiently. You can quickly produce high-quality, consistent, and on-brand outputs by turning successful formats into reusable templates, even as demands increase. Templates also serve as an **accelerated learning tool** for AI, guiding it to replicate effective structures without starting from scratch each time.

As Kipp Bodnar explains, **"You're talking about building templates to reverse engineer best practices more quickly. You want to find the best experts and use AI to help you quickly reverse engineer what they're doing. Then you ask AI, how do you build me a prompt so I can do this at scale instead of doing this as a one-off project."** By leveraging templates, marketers can embed best practices directly into their workflows, maximizing AI's potential for consistent, scalable content creation.

Reverse Engineering Success

One of the most valuable aspects of template creation is the ability to **reverse-engineer high-performing content.** Start by identifying successful content pieces—social posts, blog intros, or email sequences—that resonate with your target audience. Analyze these pieces' style, structure, and tone, and look for common elements that contribute to their effectiveness.

By distilling these elements into a template, you equip AI to replicate the style and structure for similar content aimed at different audience segments or goals. This approach allows you to scale best practices, ensuring AI is trained to deliver quality content every time.

Creating Effective Templates

Building effective templates begins with identifying repeatable content types and breaking down their essential components. Here's a simple framework for creating AI-friendly templates:

1 Choose High-Impact Content Types

Start by identifying the types of content you create frequently, such as blog posts, social media updates, or email copy. These are ideal candidates for templating since they benefit most from consistent structure and tone.

2 Analyze and Break Down the Content

Examine high-performing examples of each content type to identify what makes them effective. Look for tone, structure, hooks, and style that consistently engage readers.
To streamline this process, use tools like ChatGPT or Claude—simply ask them to analyze a specific content piece and highlight its key components. This AI-driven analysis can help you pinpoint elements to include in your template, making it easier to replicate successful structures.

3 Define Key Elements for Replication

Outline the key elements in each content type you want replicated. For a blog intro, this could include an attention-grabbing hook, a brief overview, and a call to action. Defining these elements in the template creates a clear structure for AI to follow.

4 Create the Template

Combine these elements into a structured template, specifying tone, style, and formatting. A template guides AI, helping it produce outputs that stay true to your identified successful patterns.

Case Study

Scalable Content Strategies with MrBeast and Jenny Hoyos

A great example of scalable content strategies comes from YouTube creators like MrBeast and Jenny Hoyos. Both creators have fine-tuned their video formats down to a science. MrBeast, for instance, breaks his videos down minute by minute to ensure every second contributes to audience engagement, while Jenny Hoyos structures her YouTube Shorts to captivate viewers within seconds.

By studying successful creators like these, you can analyze what makes their content work and adapt those principles to your templates. For instance, you might discover that a specific opening hook or visual pacing pattern resonates with viewers. Building these observations into a template enables AI to replicate high-performing elements in future content, optimizing engagement.

Step 4

Leveraging Virtual Agents for Automation and Efficiency

Virtual agents are more than support tools; they're integral players in your team, capable of managing various tasks with speed, consistency, and precision.

What Are Virtual Agents?

Virtual agents are AI-driven programs designed to perform specific, repetitive tasks autonomously, from lead generation to social media engagement. By offloading these essential but time-intensive activities, virtual agents boost operational efficiency, reduce workloads, and ensure consistent execution at scale. Whether nurturing leads, interacting on social media, or categorizing content for optimal reach, virtual agents empower teams to operate effectively and stay focused on what matters most.

Why Virtual Agents Are a Game-Changer

Building effective templates begins with identifying repeatable content types and breaking down their essential components. Here's a simple framework for creating AI-friendly templates:

1 Targeted Optimization for Content and Engagement

Virtual agents can go beyond basic tasks by categorizing content and optimizing it for specific platforms. For example, Kieran used an AI agent to analyze and categorize his LinkedIn content using different engagement styles, each proven to resonate with his audience. The agent categorized posts into formats such as:

- **Educational Lessons:** Posts that share a clear, actionable takeaway on a relevant topic. This content establishes credibility and provides direct value, making it highly shareable and engaging.
- **Counterintuitive Takes:** Posts that challenge common beliefs or provide a "spicy take" on industry norms. These posts often spark conversation by offering an unexpected perspective encouraging engagement through likes, comments, and shares.
- **Head Nods:** Posts that reinforce widely-held beliefs or insights in a way that feels affirming for the audience. These posts create a sense of relatability as readers see their thoughts or challenges reflected in the content.

By breaking down his content into these categories, Kieran could align each post with the style most likely to drive engagement on LinkedIn. This level of precision enables marketers to deliver tailored, relevant, and optimized content for maximum impact, turning one-off posts into a more strategic, scalable content approach. The AI agent doesn't just automate posting; it designs pieces of content to connect meaningfully with the audience.

2 Scalability with Strategy

When virtual agents categorize and format content based on what works best, marketers can scale with purpose. Kieran's AI agent helped him increase his LinkedIn impressions from hundreds of thousands to millions, demonstrating the scalability of this approach. Marketers can consistently replicate high-performing content by incorporating proven best practices into the agent's programming.

3 A New Team Structure

Kieran envisions future marketing teams with human and AI members, each fulfilling unique roles. AI agents handle routine, time-consuming tasks in this setup, giving human team members more freedom to pursue strategic projects and creative innovations. This collaboration enhances team agility, enabling marketing departments to adapt quickly to evolving goals and industry trends.

Implementing Agents in Marketing Workflows

Ready to bring virtual agents into your workflow? Here's a step-by-step guide to help you get started with an AI agent tailored to your marketing needs:

Identify High-Impact Tasks for Automation

Pinpoint the tasks that are essential yet repetitive, such as lead generation, content categorization, or responding to FAQs. Virtual agents are ideal for these activities, where consistency and speed are critical.

Define Clear Objectives and Parameters

Establish clear goals for your virtual agent. Outline the purpose, scope, and specific outcomes you expect. For example, if the agent's task is social media engagement, specify the types of responses it should generate, tone of voice, and any escalation procedures for complex inquiries.

Select the Right AI Tool

Choose an AI tool or platform with capabilities that match your needs. Look for solutions that allow customization, giving you control over the workflows, responses, and escalation paths to align with your brand.

Train the Agent with Brand Context and Data

To ensure consistency with your brand, provide the virtual agent with context, such as customer personas, brand tone, and example responses. This helps it understand the nuances of your brand and deliver authentic interactions.

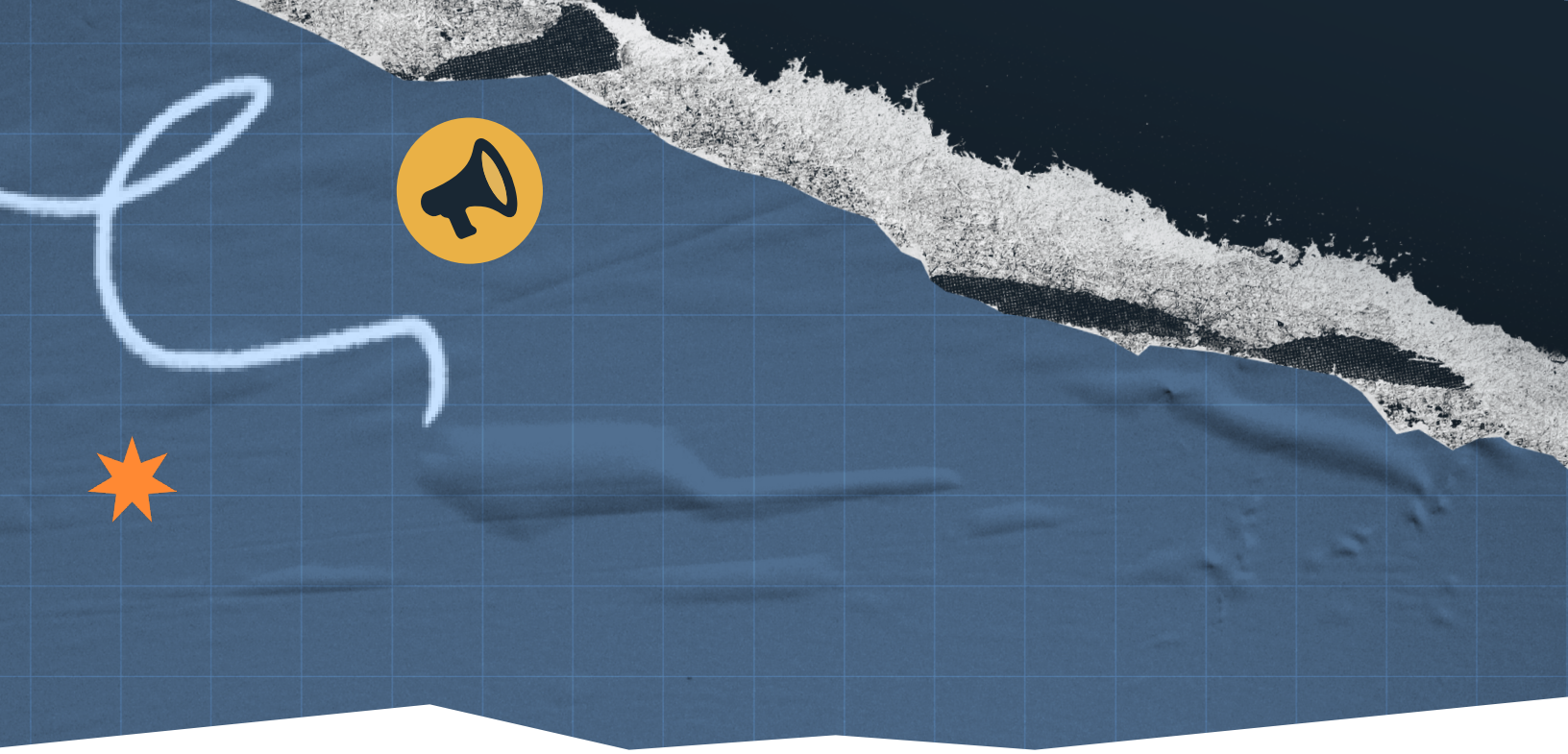
Run Test Scenarios and Iterate

Test the agent in real-world scenarios to evaluate performance. Collect feedback and refine parameters based on initial results to improve response accuracy and effectiveness. Iteration is critical to aligning the agent's outputs with your goals.

Monitor Performance and Optimize Regularly

Once live, continue to monitor the agent's performance. Regular optimization allows you to refine its capabilities, keeping it aligned with evolving objectives and improving over time.

By embracing virtual agents as integral team members, you can enhance operational efficiency, scale efforts, and focus your team's energy on strategic growth. Virtual agents streamline workflows and position your marketing team to achieve more with greater precision and impact.



Step 5

Building Custom Apps with AI Coding

AI coding has opened new doors for marketers, making it possible to create custom applications without extensive programming knowledge. Platforms like GPT Engineer allow marketers to build custom web apps and prototypes by simply describing what they want to make. This trend in AI coding has lowered the barrier for marketers, founders, and non-technical professionals to experiment, test, and implement ideas that would have once required hiring a developer or waiting weeks for an outsourced project.

Kieran Flanagan and Kipp Bodnar envision a future where anyone can leverage AI coding to build applications that enhance their marketing strategy. Through accessible coding platforms, marketers are no longer limited to pre-built software or single-task AI agents—they can create tools specifically tailored to their needs, from aggregating data for strategic insights to building interactive dashboards.

Understanding the Difference Between Agents and AI Coding for Custom Solutions

Virtual Agents

Virtual agents are AI tools that handle specific, repeatable tasks within a defined scope. They're best for routine activities that require consistency and speed, such as lead generation, social media engagement, or fundamental customer service interactions. Virtual agents are considered dedicated assistants who focus on one task at a time and follow straightforward guidelines to perform specific functions.

AI Coding for Custom Solutions

AI coding, in contrast, allows marketers to build more versatile applications tailored to unique or complex needs. These custom-built apps can integrate data from multiple sources, perform data analysis, or generate personalized insights that inform strategy. For example, a marketer can use GPT Engineer to build an app that aggregates and analyzes competitive data, providing insights into industry trends and market shifts.

Virtual Agents	AI Coding for Apps
Perform specific, repeatable tasks	Create multi-functional, custom applications
Task-oriented (e.g., lead generation)	Handles complex processes (e.g., data analysis, content recommendations)
Limited scope and narrow focus	Flexible scope for advanced, tailored solutions
Example: Categorizing social posts	Example: Building a marketing index dashboard

Leveraging Apps to Solve Complex Marketing Challenges

AI coding tools like GPT Engineer allow marketers to take control of their ideas and build applications that address unique, data-driven challenges. Kipp shares an example of using GPT Engineer to create a custom app that tracks marketing data across companies, analyzing metrics such as website traffic and advertising spending. This app gives marketers insights into industry leaders' strategies, allowing them to identify emerging trends and opportunities for innovation.

What's revolutionary about AI coding is that it enables marketers to build these tools in real-time, often within minutes. Using natural language commands, GPT Engineer translates a marketer's vision into working code, making it possible to develop tools that previously required coding expertise. Tools like GPT Engineer allow marketers to experiment, iterate, and bring ideas to life without technical limitations.

When to Use AI Coding for Custom Applications

AI coding is beneficial when marketers need customized solutions beyond routine tasks. Here are some scenarios where AI coding can deliver significant value:

Competitive Analysis and Market Tracking

Marketers can build an app that tracks industry competitors, gathering and analyzing data on metrics like website traffic, ad spend, and backlink growth. These insights allow marketers to keep a pulse on market leaders and adapt their strategies accordingly.

Customer Segmentation and Personalization

A custom segmentation app can analyze customer behavior patterns, engagement levels, or purchase history, creating tailored audience segments. This data enables marketers to design personalized campaigns that drive engagement and build stronger customer connections.

Real-Time Performance Analytics

Marketers can use AI coding to create an app that aggregates performance data from multiple sources, such as website analytics, social media metrics, and email engagement. This comprehensive dashboard provides a holistic view of campaign effectiveness and helps teams make data-driven adjustments on the fly.

Getting Started with AI App Development: Recommended Tools

For marketers new to coding, several beginner-friendly platforms simplify the process of building custom applications:

- **GPT Engineer** allows users to describe their app ideas in natural language, generating working code for web apps and data integrations. This tool is ideal for creating prototypes and testing new ideas quickly, making it a great starting point for non-technical users.
- **Replit** is a collaborative coding platform that supports beginners by offering templates and a guided environment for building and deploying apps. It's well-suited for users who want to experiment with more hands-on coding in a user-friendly space.
- **Zapier** isn't a traditional coding tool. It allows users to connect multiple applications to automate workflows and data transfers, enabling lightweight customizations by integrating AI tools with existing marketing platforms.

With these tools, marketers can begin building custom applications that address specific needs and solve complex challenges without learning traditional coding. By incorporating AI coding into their toolkit, marketers can create tailored solutions that drive innovation, streamline operations, and expand their strategic capabilities.

Conclusion

Key Takeaways on Leveraging AI for Marketing Success

Throughout this guide, we've explored how integrating AI into your marketing strategy can transform how your team works, engages with customers, and achieves growth.

Here are the core takeaways to remember:

Streamline Operations with AI Agents and Apps

Virtual agents and custom AI-powered applications can handle routine, time-consuming tasks—from lead generation to content categorization—allowing your team to operate more efficiently. By automating these processes, AI empowers your team to focus on strategy and innovation.

Scale Personalization and Engagement

AI enables you to tailor content and interactions at a scale that's difficult to achieve manually. Whether through personalized content recommendations, audience segmentation, or targeted outreach, AI makes connecting with customers on a meaningful level easier.

Enhance Creativity and Strategic Focus

With AI handling operational tasks, your team can prioritize high-level strategy and creative work. This combination of AI efficiency and human insight allows you to push boundaries, test new ideas, and create impactful campaigns.

Unlock Insights Faster with Data-Driven Tools

Custom AI apps built through accessible coding platforms allow users to analyze large data sets, uncover trends, and make data-informed decisions—all in real-time. These insights are invaluable for adapting quickly to market shifts and staying competitive.

As AI technology evolves, so do the possibilities it offers for marketers. We encourage you to keep exploring, experimenting, and refining your use of AI tools. Each prompt you improve, the template you build, and the app you deploy brings you closer to fully realizing AI's potential. HubSpot is here to support you on this journey, helping you shape the future of your marketing with confidence.

Try HubSpot's AI Solution, Breeze for free

Appendix

Practical AI Tools and Resources

To help you continue your AI journey, HubSpot offers a variety of resources, tools, and templates designed to support you as you build on the strategies in this guide. Here's a curated selection to get started:

Quick Access Resources

AI Prompt Libraries

Access HubSpot's AI Prompt Library, which offers high-quality prompts to help you create effective prompting, refine outputs, and boost the relevance of AI-generated content in your projects.

Templates and Toolkits

Leverage structured workflows to integrate AI into daily marketing activities with these templates and guides:

- **How to Create a Custom GPT:**
  A Google Drive template for designing a personalized GPT model tailored to your marketing needs.
- **How to Use AI as Your Marketing Assistant:**
  A comprehensive guide to using AI as a marketing assistant, from content creation to customer engagement.
- **How to Use AI to Create a Marketing Plan:**
  An ebook providing a step-by-step approach to building a marketing plan powered by AI.
- **AI Adoption Playbook for Business Leaders:**
  An ebook that is the ultimate checklist for effectively integrating AI into your business processes.
- **Search TAM Analysis Template:**
  A Google Drive template to conduct Total Addressable Market (TAM) analysis, maximizing market insights with AI.

Specialized Kits

For a comprehensive approach to AI-powered productivity and strategy, HubSpot provides the **ChatGPT at Work Bundle**, which includes:

- A flowchart for efficient AI integration
- A template for setting brand guidelines on AI use
- AI-Generated Content Refinement Checklist
- The Ultimate Checklist for Adopting AI at Work
- A guide to enhancing productivity with generative AI

With these resources at your fingertips, you can explore AI's potential in greater depth, refine your approach, and continue innovating. HubSpot empowers you to turn AI into a high-impact element of yourmarketing strategy.