THE AI - POWERED MARTECH PLAYBOOK

Boosting Performance, Personalization, and Productivity

Digital Loop

Steinsdorfstraße 2,
80538 Munich
Phone: 089 41 61 47 83 0

contact@digital-loop.com
www.digital-loop.com

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digitalloop

The Rise of AI in Marketing Technology

Artificial Intelligence (AI) has become an important technology in the MarTech landscape. There are a lot of new tools and features using AI to either supplement tasks within (online) marketing or even to replace them. Still, we feel like many decision makers and marketeers underestimate - or sometimes fear - how AI could be used within their MarTech stack to support their goals. And I understand the restraint from the topic.

AI literacy

With this Whitepaper, we want to encourage people who might consider themselves as not very AI literate to get in touch with the topic and give you inspiration on how AI could be used in your area to optimize your day - to - day work and reach your goals. Moreover, we want to provide an idea of how and where to start when it comes to realizing an AI project to simplify your entrance into the topic.

Understanding AI

Before we start our deep - dive into AI use cases in MarTech, I would first like to introduce you to the basics of AI.

First, AI encompasses all technologies related to “computers and machines that can reason, learn, and act in such a way that would normally require human intelligence or that involves data whose scale exceeds what humans can analyze”. The most important AI - driven capabilities include:

Machine Learning (ML)	Algorithms that learn from data and make predictions or automate decisions without explicit programming. This is used in areas like customer segmentation, predictive analytics, and fraud detection.
Natural Language Processing (NLP)	The ability of machines to understand and generate human language, which powers AI - driven chatbots, content creation tools, and sentiment analysis.
Computer Vision	AI's ability to analyze and interpret images and videos, which is useful in ad creative optimization and visual search.
Large Language Models (LLMs):	These are advanced AI models trained on vast amounts of text data. They can generate high - quality content, summarize information, and provide customer support at scale. Popular examples include ChatGPT, which powers many AI - driven marketing applications.

All of these capabilities have in common that they require a large amount of data to learn from in order to act intelligently afterwards. Simply summarized, the machines learn from patterns in your data to then make predictions or to create new content or data. Let's assume you have a database containing customer data. You now want to use machine learning to predict which customer has a high probability for churn. Your algorithm is taking your historic customer data and tries to find patterns, like how the products bought by a customer or demographic information like his/her age might impact the churn - risk. Now, when a new customer is entering your database, a churn - score will be calculated based on the algorithms' experience.

Sources:

- *Russell, S., & Norvig, P. (2021). Artificial Intelligence: A Modern Approach. Pearson.*
- *McKinsey & Company (2023). The State of AI in 2023: Generative AI's Breakout Year.*
- *OpenAI (2024). Understanding Large Language Models.*

AI Use Cases in MarTech

Having gained a basic understanding of what AI is and how it works, I want to talk about how to use it. As I am working in a consultancy, I usually think of problems and solutions. This is why I want to build this next section by presenting you a problem and how the use of AI can solve it. We will focus on the areas of Content & SEO, Performance Marketing, Personalization & Customer Engagement, A/B - Testing & Experimentation, Data & Analytics as well as Collaboration & Productivity.

The use cases presented here are just some examples, and I am very sure that many companies have way more creative and innovative ideas and AI - based solutions. Some of the solutions presented here might already be deployable with existing tools, others afford custom setup and development.

Content & SEO

Problem

Creating quality content at scale while maintaining SEO relevance is time - consuming and resource - intensive.

AI Solution

Creating quality content at scale while maintaining SEO relevance is time - consuming and resource - intensive.

When approaching content creation, it's helpful to consider the four common types of search intent: Informational, Navigational, Transactional, and Commercial. AI can play different roles depending on which type of content you're aiming to produce.

For product - specific content - such as detailed product descriptions, pricing, or data - driven insights - AI automation is often challenging. This type of content requires highly specific, brand - owned data and domain knowledge. Training AI with this information can be resource - intensive and may not deliver a clear return on investment.

In contrast, informational content - such as "What is," "How to," or "Why" queries - is generally easier to scale with AI. For example, if you're a financial institution wanting to publish an article like "What are investment funds and how do they work?", AI models can efficiently generate high - quality content, since this type of knowledge is already widely available in their training data. You could simply ask a model like ChatGPT to draft a basic article, or you could build a customized workflow that incorporates brand guidelines, tone of voice, and SEO requirements. With an advanced setup - where prompts are automatically enriched with structured information - you may only need to add a few keywords to generate content that's almost ready for publication.

However, it's important to acknowledge the shift happening in SEO: informational queries are increasingly being answered directly by LLMs (like ChatGPT) or Google's AI-generated summaries. This can reduce click-through rates from search results, as users often get the answers they need without visiting a website.

To counter this trend, it's becoming crucial to diversify your content strategy by creating more commercial and transactional content—content that addresses product comparisons, purchase considerations, or user-specific solutions. These types of content are closer to the conversion point and are less likely to be replaced entirely by AI-generated answers. AI can still assist here—by drafting outlines, generating variations, or scaling SEO-driven optimizations—while your team focuses on refining the content for conversion.

Problem

Complex internal linking strategies that are hard to maintain and adjust for big and complex websites.

AI Solution

If your website not only contains product-related information but also informative content like articles, blog posts, or news, it can be hard to set up and maintain a proper internal linking strategy. Especially if you follow a strategy of generating a lot of content with AI, it also makes sense to automatically get suggestions for valuable internal links. At this point, AI can help by, for example, driving semantic and contextual analysis on all of your pages and recommending links if the content matches one of your other pages. But not only contextual information can be important for internal linking. By also training your AI with Analytics Data, you can prioritize your high-value pages with regard to conversions to optimize their visibility within SERPs.

Problem

It can sometimes be hard to keep track of trends (seasonal and non-seasonal) in order to plan your content according to the users' needs.

AI Solution

Search Volume is highly driven by current trends and events. In order to get a slice of the cake—or in our case: the traffic—it is very important to keep track of trending topics and to deliver content that is interesting and relevant for users. In order to do so, you could use AI for predictive trend analysis. As training data, you could, on the one hand, use historical content and interaction data to find out if there are seasonal trends. On the other hand, you also must include current data to depict trends. This can be done by analyzing news data and searching for specific topics that occur significantly often. Another data source to use can be Google Trends data. By adding your company's context, the AI can then select the topics specifically interesting for your target audience.

Data Analytics, Personalization & Customer Engagement

Problem

We are struggling with effectively understanding individual customer preferences and predicting their future needs and actions. This lack of deep insight leads to generic marketing efforts and missed opportunities for personalized engagement.

AI Solution

Wouldn't it be nice to know what your customers really want and think and to predict how they will behave in the future? Especially when it comes to personalization, understanding your customers' wants and needs is a - if not the - key to success. AI can be a big support when it comes to categorizing your customers according to what they might do next. By analyzing historical data, an AI can calculate probabilities of what might happen next. There are two major concepts of utilizing these predictions within customer segmentation & personalization: Next-Best-Offer (NBO) strategies and the calculation of scores. The concept of NBOs is mainly to define a specific offer the customer should be targeted with next. Imagine you're a telecommunications company preparing the content of your next newsletter. The idea is to have a teaser within this newsletter that promotes a product - our customer's Next Best Offer. For customer A, this can be the newest iPhone, for customer B Samsung Headphones and customer C is offered a new internet contract.

The concept of scores therefore is different regarding the outcome. A score always depicts the probability of something. In our case, this would be the probability of our customer making a certain next action. So let's assume we want to set up a campaign targeting all users that are likely to cancel their contract in the near future. To indicate this, we can let the AI calculate a churn-score for each customer, indicating the likelihood of their cancellation. If the score is above a certain value, we'll offer the customer a discount so she stays with us.

Problem

Personalization based on static segment definitions is limited when it comes to scalability

AI Solution

As personalization strategies evolve, the limitations of static segmentation become increasingly evident—especially when scale and complexity grow. Pre-defined audiences may work in simple scenarios, but they quickly become inefficient when dealing with a broad and dynamic product portfolio. For example, a retailer offering thousands of product variations would find it nearly impossible to manually create and maintain segments for every relevant customer-product combination. This is where AI fundamentally shifts the paradigm.

AI enables a move from static, rule-based targeting to dynamic, behavior-driven personalization. Instead of relying on predefined segments, machine learning models can continuously analyze real-time user signals—clicks, views, purchases—and match them with historical behavior, CRM data, product inventory, and business priorities. This allows organizations to respond to individual user intent in the moment, with highly relevant recommendations and actions that align with both customer needs and strategic goals.

By incorporating factors like product availability, margin contribution, and campaign priorities, AI-driven personalization not only enhances the user experience but also drives business impact. It enables marketing and product teams to personalize at scale without the operational burden of manual segment creation. Ultimately, AI allows brands to deliver relevance in every interaction—efficiently, intelligently, and with measurable results.

Moreover, AI systems are not static; they improve over time. The more interactions they process, the more refined their predictions and outputs become. This creates a self-optimizing feedback loop where performance gains accelerate. As a result, brands can shift from campaign-driven marketing to a model where every touchpoint becomes an opportunity to learn, adapt, and convert—continuously.

Strategically, this unlocks a new level of agility. Instead of long planning cycles to define segments and journeys, teams can focus on setting the right guardrails—such as business objectives, compliance requirements, or brand tone—while the AI handles the complexity of individualization. This frees up resources, speeds up go-to-market, and ensures that personalization efforts are always current, contextual, and effective.

For organizations seeking to future-proof their personalization strategy, embracing AI is no longer optional. It's a foundational capability that connects data, technology, and business value in a scalable and sustainable way.

Problem

Though Customer Interaction Data is being collected, it is not really used for optimizations and actions within the different channels.

AI Solution

This is a topic that has been accompanying us at Digital Loop for a very long time. The question of how to make your data more actionable is a very current one. A lot of companies collect a vast amount of data but are often not able to utilize it for marketing or optimization. Using AI, can be a great support for your teams to analyze your data and generate actionable insights that your marketing teams can use. One way to do this is to bring all your relevant data together in one place, like a data warehouse or a customer data platform.

Here's an example: you are a retail company selling groceries. You built a Data Warehouse containing your analytics data, data from the Google Search Console, aggregated data from Google Ads and performance data from your e-mail marketing tool. This connected data is now analyzed by an AI in real time to detect any changes in behavior. Let's now assume that your conversion rates for seasonal products have been significantly decreasing compared to the previous week. An AI-solution could look through all your datasets - sales, search console, google ads, email marketing - and can quickly show you the reason for the decrease. In our case the traffic coming to the respective product pages is increasing due to a new e-mail and SEA campaign with the sales not increasing in the same way. One possible solution could be to optimize the campaign in order to optimize the conversion rate in the same way.

A/B Testing & Experimentation

Problem

In small companies/teams, there is not enough expertise or the right expertise to get enough hypotheses.

AI Solution

Generating optimization ideas and good test hypotheses requires a lot of time, effort, and also expertise. There are a lot of ways to detect the potential for improvement. There are the quantitative ones like classic Digital Analytics or the more qualitative ones like UX Audits or Usability Labs. All of them are a great starting point to find things that can be optimized on your website. The problem - especially in smaller companies or companies with a very young testing program - is that there are not enough resources or the right experts to invest time in such analysis to find potential to test. From my experience, new CRO projects require results and attention to convince the company of the advantages of testing and to slowly change the mindset. This can lead to more resources and ideas. In order to get results, you need good ideas with a high potential of success. But as already mentioned above, to get these ideas, you need time and resources. And this is where the vicious cycle starts.

At this point, AI can be a great support for young projects to get started with some strong hypotheses in order to get attention. There are various options on how to utilize AI for your hypothesis-generation.

If you really want to start with the least effort possible, you can use LLMs like ChatGPT and Perplexity to get some first ideas. Please keep in mind that those models are not focused on UX analysis and therefore will only deliver very generic ideas and concepts. But if you are new to the game, this might still be a good way to get your CRO project going. Here is an example prompt you could use to get some ideas:

Anna Graser
MarTech Consultant

Digital Loop

I am a CRO manager and would like to find ideas for my next A/B-tests. I require detailed information of what to optimize and the changes you suggest.

Can you please scan the following page and provide me 3 ideas of what to optimize and how to optimize it. Additionally, please provide a hypothesis for each of the ideas:

- Impacted KPI(s) by the optimization:
  [*e.g. Conversion-Rate or Click-Rate*]
- Estimated effort to set up the A/B-test and implement the change:
  [*e.g. high, medium or low*]
- URL of the page:
  [*enter the URL of the page you want to optimize*]

From my personal experience, the most qualitative ideas can be generated with Perplexity and Google Gemini. ChatGPT had the most general ideas, which also tended to repeat if you were checking for potentials on more than one URL.

There are, of course, also tools in the market that provide more advanced input when it comes to idea and hypothesis generation. We can consider, for example, the plugins in Figma, which provide AI-driven ideas for optimization; tools like UXaudit.io, that also provide AI-driven page analysis and insight to take as a basis for A/B-testing; or platforms like ABtesting.ai that take it one step further by not only taking care of identifying optimization potentials but also set up and run the experiments automatically.

Problem

Test prioritization is often a political and therefore subjective topic.

AI Solution

When it comes to deciding which A/B-tests are set up first, it can become very subjective and also political. So, of course, you would try to find objective factors that help you define an order in which your tests will be set up. This could be something like the expected impact on important KPIs, or the effort to set up the test. If you have a smaller website and a relatively small testing program, creating a static prioritization based on pre-defined metrics is, from my experience, completely sufficient. But as soon as your project is getting bigger and more complex, you need to consider other factors as well when it comes to campaign priority. One thing you definitely need to keep in mind is that you should not run multiple tests at the same time on the same page or within the same flow. Here's an example why: imagine you are optimizing the website for a big retailer in the clothing industry and you are running tests in the checkout funnel. Currently, there are two tests running in parallel: one in the purchase overview and a second one within the payment section. As both tests are running independently, users on your website are randomly selected for any variant within your tests. As both changes could impact your conversion rate in the end, it will not be detectable which change leads to a shift in the KPI. Now, this is a very obvious example. But there might be cases where it is not that obvious which tests could influence each other.

If you had an AI that is using your Analytics-Data to check the user flows on your website, you can make sure to implement tests in the same flows one after another. Additionally, the AI can use factors like page traffic to prioritize tests on high-traffic pages or your individual input like effort estimation or your impacted success on specific KPIs. Depending on the kind and amount of data available to you, it is also possible that your AI predicts the likelihood of success based on previous tests and their results.

Productivity & Support

Problem

Onboarding new and especially junior employees is time-consuming and requires a lot of preparation.

AI Solution

Solution: Onboarding a new colleague in your company requires a lot of preparation. Every employee is different in terms of prior experience, tasks, and the focus in their new position. So you might want to create an onboarding plan that fits your new employee's needs. However, instead of doing this manually, you could invest some time to define a great reusable prompt that allows you to specify your requirements to the onboarding plan. This could contain the following information:

- Job Role & brief description of your new employee
- Context of your company
- Years of experience of your new employee in the respective job
- Some focus topics you want to see covered in your onboarding plan
- How long should this onboarding take?
- In which format should the onboarding be held (self-onboarding, tutorials & learning sessions, 1:1 onboardings)?
- The goal of your onboarding

By adding all this context, you make sure the plan really fits your needs and requires less adaptation afterwards. If you want to go even one step further, you can take the plan as a basis and ask the AI agent to structure specific sessions that cover especially basic content.

Problem

Though there is a lot of documentation available, it is often hard to find all the information you need.

AI Solution

Documentation is a very important but unfortunately a very badly treated topic in most companies. The reasons for this are versatile, but still it leads to information gaps and a lot of effort spent on finding what you need. AI, or more specifically Chatbots, could be a great solution to drive efficiency when it comes to internal documentation. By using, for example, your internal Confluence as a data base for your AI model, it can be trained on the data available in your company. If any employee has a question, he or she does not have to manually search the docs. Instead, a chat can be used to post your questions and directly receive and answer with additional source links added. Two very important prerequisites for the success of this use case are the quality and quantity of your existing documentation. If there is no or the wrong input, your Chatbot's output will also be of poor quality and have no added value.

HOW NOT TO SCREW IT UP: YOUR AI BATTLE PLAN

Implementation Strategies for AI in MarTech

If you decide to integrate AI in your MarTech landscape, there are some considerations and steps to follow in order to make sure AI is adding value to your projects.

Prepare Your Teams

Train staff, understand AI, write prompts

Define Objectives & Business Cases

Set goals, align solutions, calculate ROI

Choose Tools & Adjust Processes

Select tools, adapt processes, build literacy

Ensure Data Quality

Accurate, complete, consistent, optimized data

Ensure Data Security

Encrypt, control access, ensure privacy compliance

Start Small & Scale Gradually

Pilot projects first, then expand adoption

Address Ethics & Compliance

Transparency, avoid bias, comply with laws

Prepare your teams

Before implementing AI, ensure your teams understand its possibilities, limitations, and risks. Data Literacy is by many experts considered to be one of the key capabilities within teams in the future. And especially when you think about working with AI, it is important to understand how it works. After your teams went through a basic enablement, it depends on the use cases you want to set up with AI and how much you want and need to invest in building up more knowledge. But even if you plan to get your implementation done with external specialists, it is necessary to have internal expertise regarding the operation of AI solutions. Being able to write a good prompt for your model is, for example, a skill every team member should have.

Define Clear Objectives & Rely on Business Cases

As AI is one of the most trending topics right now, people in MarTech are bombarded with new solutions and ideas. And though many of these solutions are super innovative and drive efficiency in many use cases, they may not work for you and your company. This is why we would always recommend you to first define what your goals are when it comes to utilizing AI and if it really counts in your strategy. You could ask yourself: Do we want to...

... use AI for enhancing customer experience and personalization?

... to improve marketing efficiency and productivity?

... gain deeper customer insights and data analysis?

... optimize marketing campaigns and spending?

... improve lead generation and qualification?

... enhance customer retention and loyalty?

... facilitate innovation in marketing?

Clearly, the main goals behind all of this are driving revenue growth and increasing the ROI. But in order to navigate the amount of AI solutions and prioritize where to start, it makes sense to compare your strategic goals with the solutions available. And then, to find out if AI ultimately increases revenue and ROI you should calculate your business case. Though AI is often reducing the cost in the long-term, many businesses underestimate the initial effort and cost to build and implement AI solutions.

Choose the Right Tools & Enable your workforce

Another important step that comes with the variety of tools offered in the market is the evaluation of the feasibility with your technical setup and business model. Even though your business cases might show the advantages of AI for your business, the reality might look different in the end. Always keep in mind that the use of AI has a huge impact on processes and the ways of working in your organization. Not thinking about the influence on this can make any business case you calculated before irrelevant. If your organization is not ready for and willing to change, AI will not add any value to your business. Additionally, you need a workforce that is able to understand the possibilities but also limits that come with the use of AI. So if you decide to implement an AI solution, you should at this moment also start building AI literacy within your employees.

Ensure Data Quality

AI relies on data. The better your data, the better the outcomes of your models. In order to make your AI project succeed, it is also crucial to ensure a high quality of data that is used to derive insights. Bad data quality in this case has many faces. It comes as inaccuracy (wrong address data), incompleteness (missing phone number or email address), inconsistency (dates uploaded in various formats), duplication (same data record exists multiple times), invalidity (ZIP code with four instead of five digits), or ambiguity (unspecific product description). All of those factors can lead to issues with your AI models. If your base data is flawed, the predictions made by your model can be inaccurate. Constantly optimizing your data base is one of the key factors of success for your AI projects.

Ensure Data Security

Protect sensitive marketing data by implementing strong security protocols, ensuring compliance with data regulations, and working with AI vendors who prioritize data privacy.

When working with data, data security is a prerequisite that has to be met. Especially using sensitive data for your models requires high security standards. Measures like Data Encryption, Data Minimization, and Data Retention policies are crucial when it comes to data governance. When developing and deploying your model, you should also implement access controls, perform regular security audits, and ensure that both training and inference environments are secured against unauthorized access. Additionally, consider using techniques like differential privacy or federated learning when applicable, to further protect individual user data while still enabling valuable insights.

Start Small and Scale Gradually

Though we really like the motto “Think big!” it is always recommended to start small when it comes to introducing new technologies and tools. If you start various projects to incorporate AI in your workflows, you may lose track of what works and what doesn’t. Therefore, it makes sense to start with a pilot project to test AI effectiveness before expanding adoption across your organization. This approach minimizes risk and ensures successful integration.

Address Ethical and Compliance Concerns

One last but very important topic is to make sure that AI is used in a compliant and ethical way. Introducing AI to your company requires a lot of things, like bias and discrimination reproduced by AI or the transparency and explainability of how they come to conclusions and why. Another important topic is accountability and responsibility if any mistakes happen. As AI is connected to data usage, it is important to set high standards for data privacy. You must ensure that only data that is compliant with privacy regulations is collected, stored, and processed. And also for prompting, it is important to make sure no private information is shared with the AI. Questions about copyright are an additional point to consider when working with AI. And at the end of 2024, the EU AI Act also required additional measures to be taken by companies utilizing AI, such as marking AI-generated content and assets. Make sure to include experts in ethical and compliance questions early enough in your projects to meet all requirements within your organization.

Conclusion

AI can be utilized in many different ways to support your business in the area of MarTech. In this playbook, we introduced only a selection of use cases that are especially suitable for companies that have little experience in AI usage. Introducing them allows you to explore possibilities but also the limitations AI can have and to scale it to add value.