Welcome and Zoom webinar user tips

Today’s session
→ The AI Marketing Canvas™

Q&A

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How to Control Your View

Introduction to AI and The AI Marketing Canvas

Jim Lecinski
Clinical Associate Professor of Marketing
June 25, 2020

Northwestern Kellogg Executive Education

← Drag and slide bar to resize speaker and slides
Introduction to AI and
The AI Marketing Canvas™

Jim Lecinski
Clinical Associate Professor of Marketing
June 25, 2020
“Whenever there is a mindset shift as there is now and new technologies (5g, machine learning, cloud and voice) there are new industries and opportunities.”

--Rishad Tobaccowala in “The Great Reinvention”

https://rishadt.wordpress.com/2020/06/17/the-great-re-invention/
How might you think about transforming your marketing?
How AI & Machine Learning can be applied to Marketing

→ Not in a Technical-first way…in a Marketing-first way = Customer First
→ Focus on AI to drive growth vs cost saving efficiencies

Offer a roadmap, a path to develop your AI growth strategy

→ Journal article in California Management Review*
→ Book forthcoming later this year from Stanford Press
Starbucks Stock Is a Solid Buy After Another Great Earnings Report

Starbucks stock has dropped about 15% from its summer high, but the coffee powerhouse is still firing on all cylinders.

Adam Levine-Weinberg (TMFGemHunter)
Nov 2, 2019 at 2:10PM
Author Bio
Starbucks’ strategy to drive growth? “Deep Brew” AI

CEO Kevin Johnson stated the company has been ramping up its investment in Artificial Intelligence

“Deep Brew will increasingly power our personalization engine.”

With more customers signing up for the company’s loyalty program, the opportunity for personalization is increasing.

Starbucks said it had 18.9 million active rewards members at the end of the first quarter, up 16% year-over-year.

“We believe enhanced digital marketing/personalization...will continue to contribute to incremental growth.” --KeyBanc

“A good personalized experience occurs when a company, in each moment, understands you as a person, decides what the best experience for you would be, and responds with relevance.”

--Karl Wirth, CEO Evergage

The Long Term “Arc” of Marketing

- **Mass Marketing**
  - Segments: 1-3
  - Data: Low
  - Technology: Low

- **Precision Marketing**
  - Segments: Dozens (Personae)
  - Data: Low-Medium
  - Technology: Low-Medium (Research)

- **Data-Driven Marketing**
  - Segments: Hundreds
  - Data: Medium
  - Technology: Medium (Database)

- **1:1 Personalized Marketing**
  - Segments: Millions
  - Data: High
  - Technology: High

© Jim Lecinski 2020
Delivering this deeply personalized experience requires a significant shift for companies.
“The future of your business is **Big Data** and **Machine Learning** applied to the business opportunities and customer challenges before you.”

--Eric Schmidt, 2017 CloudNext Conference

So what are Artificial Intelligence & Machine Learning?
Begins with the great Alan Turing

https://www.youtube.com/watch?v=dimvx7BMZKI | https://www.youtube.com/watch?v=7TyxwFmdB0
The “Turing Test”

“...if a sufficient proportion of the interrogators are unable to distinguish the computer’s responses from a human being’s...

...then according to Turing’s test, the computer is considered an intelligent, thinking entity.”

https://www.britannica.com/technology/artificial-intelligence/The-Turing-test
The original definition of AI

“Systems that perform actions that if performed by humans would be considered intelligent.”

--John McCarthy, 1956 Dartmouth Conference

MIT, Stanford
The “Father of AI”
Things that humans do considered “intelligent”

Humans have 85 billion neurons which allow us to...

- Learn from the Past
- Characterize the Present
- Foresee and predict the Future
Some definitions

**ARTIFICIAL INTELLIGENCE**
Programs with the ability to learn and reason like humans

**MACHINE LEARNING**
Algorithms with the ability to learn without being explicitly programmed

**DEEP LEARNING**
Subset of machine learning in which artificial neural networks adapt and learn from vast amounts of data
Machine Learning uses examples ("training data") to make predictions, in a sense "forward thinking" and "learning" or improving over time.

https://towardsdatascience.com/tensorflow-for-absolute-beginners-28c1544b0d6
https://towardsdatascience.com/deep-learning-with-tensorflow-part-1-b19ce7803428
https://www.youtube.com/watch?v=x_EtmaF_j2Y&list=PL8dPuuaLjXtNlUrzyH556NIQDlZBodo
Many types of Machine Learning models
Many types of Machine Learning models

You don’t know the right answer
Unlabeled Data

Grouping
Clustering

“How many customer segments should we have?”

You know the right answer
Labeled Data

Labeling
Classification

“Separate this population into best customers and those likely to attrit.”

Rooted in Statistical Methods like Regression, Cluster Analysis, Support Vector Machine (linear, non-linear)


Video: https://www.dataiku.com/webinars/machine-learning-basics-algorithms-are-your-friend/
Many types of Machine Learning models

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May also be done with non-Statistical based methods such as Deep Learning with complex Neural Networks

How is Machine Learning used, being applied today?
ML to predict healthcare

Google Researchers Trained an Algorithm to Detect Lung Cancer Better Than Radiologists

https://gizmodo.com/google-researchers-trained-an-algorithm-to-detect-lung-1834902364

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ML to predict visual product search

Foodvisor automatically tracks what you eat using deep learning

Romain Dillet
@romaindillet / 6 days ago

Meet Foodvisor, a startup that has built a mobile app that helps you log everything you eat in order to lose weight, follow a diet or get healthier. You can add data by capturing a photo of your plate before you eat.
Amazon launches Part Finder, built by technology it acquired from Partpic in 2016

Get an odd screw, nut, bolt, washer or fastener you need to buy more of, but have no idea how to find the right one? Amazon’s new “Part Finder” can help. The company has rolled out a new feature on mobile that lets you point your camera at the item in question, so Amazon can scan it, match it, then direct you to matching items from its product catalog.

Welcome to Part Finder

Search for screws, nuts, bolts, washers, and other fasteners. Check back periodically, as we plan to add many more part categories over time.

Get it

On a white surface, place a penny next to, but not touching, the part.

Hold the phone directly above the part.

Tilt the phone to bring the circle to the center of the crosshairs.

See more

Selected Type of Part:

- Sheet Metal Screw
- Wood Screw
- Self Drilling Screw

Selected Head Style:

- N/A
- Flat
- Oval
- Pan

Selected Drive Type:

- N/A

See search results
ML to predict visual product search

ML to predict text input
You help the Machine "Learn"

Are these the same person?
They will be merged together

NO  YES
Highly recommend reading this book!
Marketing is all about making predictions to deliver the right best personalized experience.
### Marketing as Prediction: Google Search campaign

<table>
<thead>
<tr>
<th>Keyword</th>
<th>Creative</th>
<th>Landing Page</th>
<th>Recipient</th>
<th>Geography</th>
<th>Day of Week</th>
<th>Time of Day</th>
<th>Bid</th>
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= $10^8$ combinations!
Managing the sophistication of today’s cross-channel personalized customer engagement exceeds human cognitive capacity.
Most have only just begun implementing Marketing AI
Many marketers think it’s hype that can be ignored

OVERHYPED MARKETING BUZZWORDS

Which of these marketing concepts do you consider to be overhyped, meaning the concept is more fantasy than reality?

Artificial Intelligence (AI) 47%
Big Data 31%
Omnichannel 23%
Real-time Marketing 20%
Personalization 14%

https://www.forbes.com/sites/ganatra/2018/03/04/is-artificial-intelligence-in-marketing-overhyped/#6ad31e7b6681
Lack of Marketing AI strategy is biggest barrier

“We have no clear plan or path.”

What Do Professionals Worldwide See as the Most Significant Barriers Organizations Face in Adopting AI?

% of respondents, Feb 2018

<table>
<thead>
<tr>
<th>Barrier</th>
<th>% Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of clear strategy for AI</td>
<td>43%</td>
</tr>
<tr>
<td>Lack of talent with appropriate skill sets for AI work</td>
<td>42%</td>
</tr>
<tr>
<td>Functional silos constrain end-to-end AI solutions</td>
<td>30%</td>
</tr>
<tr>
<td>Lack of leaders' ownership of and commitment to AI</td>
<td>27%</td>
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<tr>
<td>Lack of technological infrastructure to support AI</td>
<td>25%</td>
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<tr>
<td>Lack of available (i.e., collected) data</td>
<td>24%</td>
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<tr>
<td>Uncertain or low expectations for return on AI investments</td>
<td>24%</td>
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<tr>
<td>Underresourcing for AI in line organization</td>
<td>21%</td>
</tr>
<tr>
<td>Limited usefulness of data</td>
<td>20%</td>
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<tr>
<td>Personal judgement overrides AI-based decision making</td>
<td>19%</td>
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<tr>
<td>Limited relevance of insights from AI</td>
<td>18%</td>
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<tr>
<td>Lack of changes to frontline processes after AI’s adoption</td>
<td>12%</td>
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</table>

Note: n=1,646 whose organization has piloted or embedded AI in at least 1 function or business unit; responses of “other” or “don’t know/not applicable” not shown

What can we learn from Brands already down this path of implementing AI in Marketing?
Some of the Brands we interviewed

- McDonald's
- Unilever
- John Deere
- Coca-Cola
- ULTA
- The Washington Post
- Google
- Ancestry
- Hotel Tonight
- CarMax
- Chase
Remarkably consistent pattern emerged:

Five sequential maturity levels
# AI Marketing Canvas™ | Five stages of AI maturity

<table>
<thead>
<tr>
<th>Stages</th>
<th>AI-Acquisition</th>
<th>AI-Retention</th>
<th>AI-Growth</th>
<th>AI-Advocacy</th>
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</thead>
<tbody>
<tr>
<td>Stage 1</td>
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<td>Stage 5</td>
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**Stage 1** - Foundation

**Stage 2** - Experimentation

**Stage 3** - Expansion

**Stage 4** - Transformation

**Stage 5** - Monetization

© Jim Lecinski 2020
## AI Marketing Canvas™ | Stage 1: Foundation

### THE AI MARKETING CANVAS

<table>
<thead>
<tr>
<th></th>
<th>AI-ACQUISITION</th>
<th>AI-RETENTION</th>
<th>AI-GROWTH</th>
<th>AI-ADVOCACY</th>
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<td><strong>Stage 5</strong></td>
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<td>Monetization</td>
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<td><strong>Stage 1</strong></td>
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<td>Foundation</td>
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Prerequisite: Adequate amount of quality data to begin training machine learning models and supercharge customer relationship moments exists.

Follow all relevant legal, social, cultural and ethical standards
Stage 1--Foundation example: Unilever

THE AI MARKETING CANVAS

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<tr>
<td>AI-powered tools from third parties and vendors to get some quick learnings/wins at individual moment(s) in the customer journey. “A thousand flowers...”</td>
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<td>Expansion</td>
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<td>AI across a broader set of marketing activities. AI Marketing Champion named. Efforts coordinated, and in-house capabilities begin to develop.</td>
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</table>

We bring flavor to people’s lives. This sticker set is for all those special family moments! Friend Knorr Thailand’s official account to get the set for free. Available till February 25, 2018.
## Stage 2: Experimentation

<table>
<thead>
<tr>
<th>THE AI MARKETING CANVAS</th>
<th>AI-Acquisition</th>
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<th>AI-Growth</th>
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<tbody>
<tr>
<td><strong>Stage 5</strong> Monetization</td>
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<tr>
<td><strong>Stage 4</strong> Transformation</td>
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<td><strong>Stage 3</strong> Expansion</td>
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<tr>
<td><strong>Stage 2</strong> Experimentation</td>
<td>Team of experts using AI to create personalized experiences for customers.</td>
<td>Team of experts using AI to optimize customer retention strategies.</td>
<td>Team of experts using AI to analyze customer data and drive growth.</td>
<td>Team of experts using AI to encourage customer advocacy and loyalty.</td>
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<tr>
<td><strong>Stage 1</strong> Foundation</td>
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</table>

AI-powered tools from third parties and vendors to get some quick learnings/wins at individual moment(s) in the customer journey. “A thousand flowers...”
Stage 2--Experimentation example: JPMorgan Chase

### The AI Marketing Canvas

<table>
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<tr>
<th>Stage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Stage 1 Foundation</strong></td>
<td>Prerequisite: Adequate amount of quality data to begin training machine learning models and supercharge customer relationship moments exists.</td>
</tr>
<tr>
<td><strong>Stage 2 Experimentation</strong></td>
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</tr>
<tr>
<td><strong>Stage 3 Expansion</strong></td>
<td>AI across a broader set of marketing activities. AI Marketing Champion named. Efforts coordinated, and in-house capabilities begin to develop.</td>
</tr>
<tr>
<td><strong>Stage 4 Transformation</strong></td>
<td>AI to automate complete set of marketing activities across full customer journey. Strong in-house competency. &quot;Build or Buy.&quot;</td>
</tr>
<tr>
<td><strong>Stage 5 Monetization</strong></td>
<td>AI to drive significant new revenue streams and/or new business models. Serve external customers as a platform.</td>
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</tbody>
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**CHASE COMMITS TO AI AFTER MACHINES OUTPERFORM HUMANS IN COPYWRITING TRIALS**

Bank enters a five-year deal with AI partner Persado to help create marketing language across platforms

By Adrianna Panzani, Published on July 30, 2019.

---

The deal follows a pilot program where JPMorgan saw its click-through rates on ads jump by as much as 450% with the robot’s creative.


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<tr>
<th>THE AI MARKETING CANVAS</th>
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<td><strong>STAGE 5 MONETIZATION</strong></td>
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<td><strong>STAGE 4 TRANSFORMATION</strong></td>
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<td><strong>AI-ACQUISITION</strong></td>
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<td><strong>AI-ADVOCACY</strong></td>
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**STAGE 3 EXPANSION**

AI across a broader set of marketing activities. AI Marketing Champion named. Efforts coordinated, and in-house capabilities begin to develop.
Stage 3--Expansion example: The Coca-Cola Company

"Vending and sampling are two examples of previously anonymous, transient transactions that, when combined with a messaging interface, allow (Coke) to gather user feedback and track data, like individual purchase history and preferences, to remarket and personalize offers."

--Lauren Kunze

https://aibusiness.com/coca-cola-ai/
https://www.youtube.com/watch?v=U18uJj0GNco&feature=emb_title
# AI Marketing Canvas™ | Stage 4: Transformation

## THE AI MARKETING CANVAS

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<td>Stage 2 Experimentation</td>
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<tr>
<td>Stage 1 Foundation</td>
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**Stage 4: Transformation**

AI to automate complete set of marketing activities across full customer journey. Strong in-house competency, “Build or Buy.”
Stage 4--Transformation: John Deere ("Buy")

Blue River Group, acquired 2017 for $300MM, computer vision

Cameras see what’s happening in field real-time, 1-2MM plants

Enables autonomous decision-making based on learning

“Combine Advisor” auto-sorts grain quality

“See & Spray” system, uses 80-90% less

Established JD Labs incubator for future AI ideas (Stage 5)
# Stage 4--Transformation: Starbucks (“Build”)

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</thead>
<tbody>
<tr>
<td><strong>STAGE 5 MONETIZATION</strong></td>
<td>AI to drive significant new revenue streams and/or new business models. Serve external customers as a platform.</td>
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<td><strong>STAGE 4 TRANSFORMATION</strong></td>
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**MarketWatch**

Starbucks gets personal with Deep Brew artificial intelligence program

By Tonya Garcia
Published: Nov 1, 2019 7:02 a.m. ET

Starbucks reported 6% same-store sales growth in the U.S. and 5% growth in China, as cold drinks are getting hot.

Starbucks is stepping up technology to improve everything from customer service to labor management.

Starbucks Corp. is getting personal with its customers, enlisting help from advanced technologies that the company says will kick its digital capabilities up a notch.

<table>
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<th>THE AI MARKETING CANVAS</th>
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<td>AI-ACQUISITION</td>
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Stage 5--Monetization example: The Washington Post

**THE AI MARKETING CANVAS**

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<td>AI to automate complete set of marketing activities across full customer journey. Strong in-house competency. &quot;Build or Buy.&quot;</td>
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<td>AI across a broader set of marketing activities. AI Marketing Champion named. Efforts coordinated, and in-house capabilities begin to develop.</td>
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**Heliograf**

An Intelligent, Automated Storytelling Agent
- Automatic story generation from raw text data sources
- Delivery of channel-specific stories
- Personalized stories for readers

**Automated Story Process**

Real-Time Data → Heliograf → Output Stories

- Olympic Results
- Election Votes
- Observer
- Detector
- Writer
- Distributor
Key Takeaways for your Marketing Transformation
AI for Marketing is more than a fad or mere hype--you need a plan

Follow the 5 step AI Marketing Canvas™

1. Organize your data so you are ready to AI in Marketing
2. Tap external vendors, let a thousand flowers blossom
3. Name a champion, expand efforts and begin to in-source.
4. Prepare to make your big bet. Build vs Buy
5. Turn your successful internal efforts into external platforms

Track your progress up these 5 levels, applied across customer journey

Don’t forget the important legal, social and cultural issues!

Now is your “AI Moment of Truth”
What stage is your organization at on the AI Canvas for Marketing?

What is the first experiment you want to run in your organization?

What changes will be necessary to how you collect and analyze data about your customers?

What changes will be necessary to your team--talent, culture and process?

What major challenges, barriers to success do you anticipate?
AI in Marketing -- For yourself?

Artificial Intelligence and Machine Learning in Marketing: Live from MAICON

FREE Course

This course is an introduction to artificial intelligence and machine learning, including how they're defined, what distinguishes them from one another, how to apply them in marketing, and how to begin the conversation for prioritizing artificial intelligence.

Course Details:

- 4 lessons
- 15 videos
- 0 quizzes
- 1hr 30 minutes completion time

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Unlock the potential of your people with our practical lessons and tools.

Microsoft

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https://www.amazon.com/AI-You-Transform-Artificial-Intelligence-ebook/dp/B07T4KDHZH

https://www.deeplearning.ai/ai-for-everyone/
Good Luck on your journey
to transform & deploy AI in Marketing

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