

+ Callan Consulting

A THOUGHT LEADERSHIP REPORT

State of AI in Technology Marketing

NOVEMBER 2024



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Executive Summary

In fall 2024, Callan Consulting set about understanding how marketing organizations in the technology industry are leveraging AI—not in the offerings they are bringing to market, but rather in their own organizations. To be better marketers.

Over the past two years, AI—particularly generative AI—has changed the technology landscape, and every company needs to have its own AI story. But are technology marketers eating their own dog food? And to what extent? What are the best practices marketing teams who are a bit late to the game can benchmark against?

To answer these questions, we spoke with 12 marketing executives, predominantly CMOs, at B2B technology organizations in companies ranging from under \$10 million in annual revenue to over \$2.7 billion.



We found that overall, it remains early days for AI in marketing, with some companies barely scratching the surface beyond using generative AI for content development, and other companies in early experimentation mode, trialing the technology across a handful of use cases. The one consistency is that everyone agrees that AI, and generative AI in particular, has the potential to dramatically change the face of marketing.

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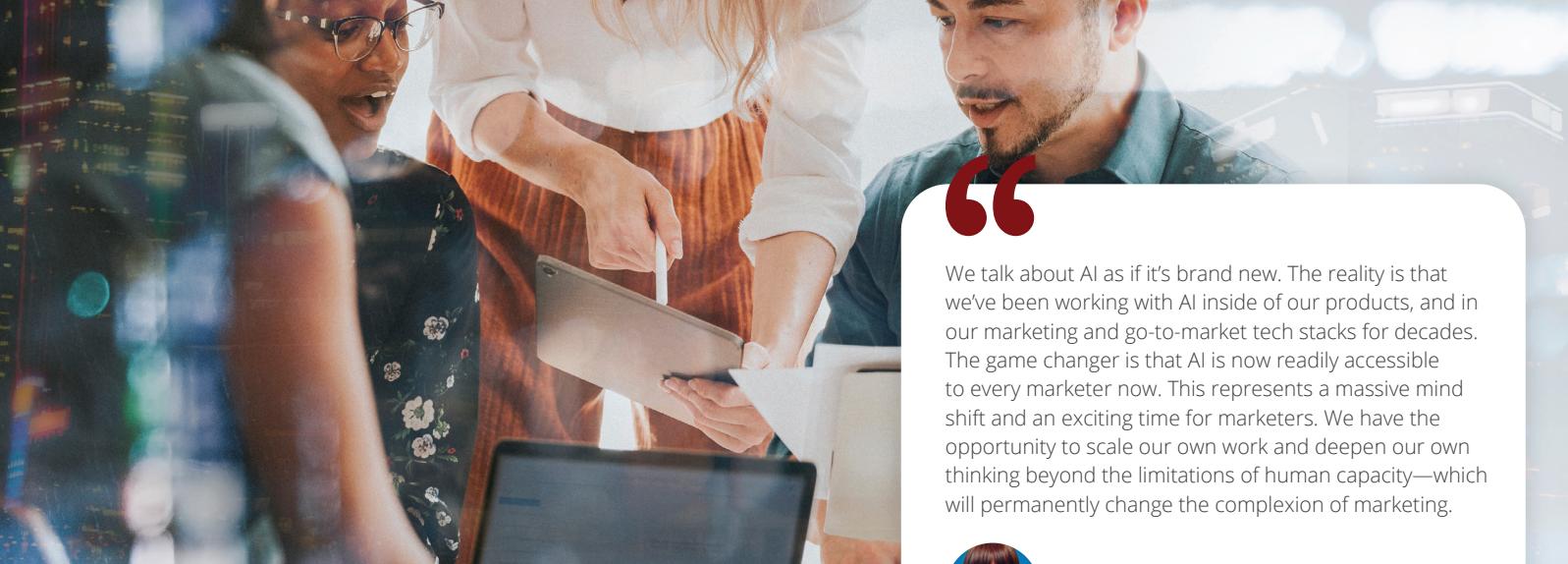
It's rare for us as marketers to see true sea changes in the marketing landscape. But like the attribution and metrics revolution in the 2000s, and account based in the 2010s, every now and again something comes along that changes the game. AI feels like one of those moments.

Marketers who adapt and figure out how to use it throughout their organization will thrive, while those who don't risk being left behind.



Christine Royston

CMO, Wrike



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We talk about AI as if it's brand new. The reality is that we've been working with AI inside of our products, and in our marketing and go-to-market tech stacks for decades. The game changer is that AI is now readily accessible to every marketer now. This represents a massive mind shift and an exciting time for marketers. We have the opportunity to scale our own work and deepen our own thinking beyond the limitations of human capacity—which will permanently change the complexion of marketing.



Amy Heidersbach

CMO, Dice

Additional Findings of Note

- 01** Many organizations are building AI into their product offerings, and marketing teams' efforts are currently more focused on telling that story than on incorporating AI into their own functions.
- 02** The most predominant use case is content generation. In addition, most organizations are taking advantage of the AI capabilities that are being built into their marketing tech stack.
- 03** The more sophisticated users are starting to gain traction with more advanced use cases, including lead scoring, market and competitive intelligence, campaign optimization, and even SDR support.
- 04** Most use began in a bottoms-up manner, with individuals proactively taking it upon themselves to experiment with different technologies; it is not being driven from the top down by the board or C-suite.
- 05** While most believe that there are real benefits to be gained from AI in terms of team efficiency and departmental performance improvement, they find it difficult to pin down specific metrics and efficiencies achieved to date.
- 06** Barriers do exist; these include cultural barriers and acceptance, concern over data leakage and hallucinations, and simply making the time for and managing the disruption of doing business differently.

Looking forward, it's clear that we are merely at the beginning of the AI journey, with far greater changes in store. Over the next six to nine months, marketing teams will continue to experiment with and formalize more sophisticated use cases, including lead scoring, competitive assessments, customer journey mapping, and campaign optimization.

But looking even further ahead, say three to five years, generative AI could fundamentally change the way that customers go about their buying journey and therefore how marketers communicate with customers. Teams will need to learn entirely new ways of reaching customers, and organizations who are educating themselves and putting serious focus on AI now are placing themselves in the best position to succeed in this new world.

Study Introduction and Background

In fall 2024, Callan Consulting set out to perform a study to identify how organizations among our client base (predominantly B2B technology companies) are leveraging AI in their marketing organizations, with a particular emphasis on generative AI. We embarked on this effort because we found many of our clients to be highly focused on how to tell the AI story in their products to their customers, but we saw far less evidence of marketers proactively using the technology to improve their own functions. What we were noticing was very much a case of the cobbler's kids having no shoes.

To gather insights, we interviewed twelve heads of marketing organizations, mostly CMOs, from companies with a range of solutions and a broad range of revenues—from series B/C companies to publicly traded firms, and with annual revenues spanning from under \$10 million (D-Wave), to over \$2.7 Billion (DocuSign). The companies we spoke with have an average annual revenue of \$464 million and a median of \$126 million. For additional details on interviewees and company profile, see Appendix A.

Findings: The State of AI in Marketing Organizations Today

When it comes to the use of AI in marketing organizations, we found that it's early days, with organizations just starting their journeys. But marketers are progressing rapidly, and most expect to be much further along in six to nine months. Many organizations we spoke with are building AI into their product offerings, and marketing teams' efforts are more focused on telling that story than on incorporating AI into their own functions, with the most predominant use case being content generation, and many companies taking advantage of the AI capabilities being provided in their marketing tech stack. We also found that most of the use of AI in marketing began in a bottoms-up manner, with individuals proactively going out and experimenting with different technologies, and are not being driven from the top down by the board or C-suite.

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We struggle as marketers, doing a ton of research to understand customer behavior and the customer journey, but our models are not very smart. We keep testing and testing, but with GDPR and other blockers there's only so much we can know.

We may need to use AI more, to better understand customers' behavior and serve up what they actually want. AI may give us the opportunity to democratize the customer behavior understanding mechanism.



Anonymous



It's Early Days, with Rapid Progress Being Made

We found more or less universal agreement among study respondents that when it comes to marketing organizations adopting AI for use in their own departments, it's still very early days. While marketing teams are putting a great deal of focus on their companies building AI into the offerings they are taking to market, along with how to communicate the benefits of AI in those offerings, most are lagging much further behind when it comes to using AI to modernize their own department's function.

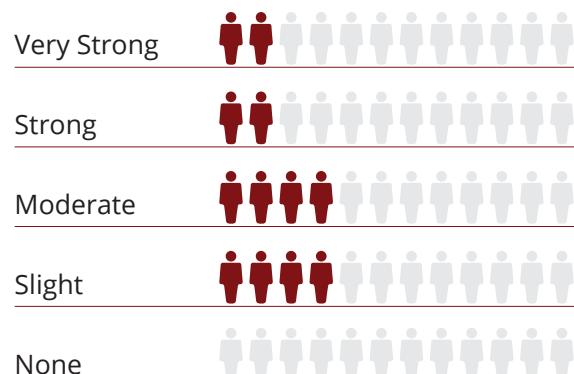
All the marketing leaders we spoke with (and their teams) are using AI in at least some capacity, with some further along in their journey than others. A few are using it for little more than an assist in content generation, while others are exploring a broad range of use cases. When asked how AI is impacting their department, two thirds said it is having a slight or moderate impact, with only four of the twelve saying it is having a strong or very strong impact (Figure 1).

But the leaders interviewed have a deep appreciation of the fact that AI offers the promise of greatly improving both efficiency and effectiveness, and those who are not as far along are concerned that they risk being left behind.

Nearly all the organizations we spoke with are in an exploratory mode, testing AI-enabled tools across different marketing use cases and getting an early read on the benefits of doing so. When asked to characterize their current approach to implementing AI, eight interviewees said they are in a pilot mode, with a subset of their team using it daily, with another four characterizing that individuals are using it in an ad-hoc manner without departmental-wide adoption. Only two interviewees responded that they have significantly overhauled the marketing function, with AI being used on a day-to-day basis (Figure 2).

Notably, we detected what we believe to have been a bit of posturing during the interviews. It's clear that there are "right" answers to some of these questions, and it seemed that many interviewees didn't want to come across as not being sufficiently up to speed compared to their peers. Many CMOs want to be part of the mix/Silicon Valley community and are professionals at representing their companies, products, and organizations in the best light. It sometimes took a bit of digging beneath the surface to get them to acknowledge that they should be using AI more in their department than they currently are and that they have yet to embrace it in a proactive, directed manner.

Figure 1 – Departmental AI Impact



Q: What impact is AI having on the tools and processes you currently employ in your department? (n=12)

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It's only been 18 months or so, but I feel like I'm already late to the party. I know how to use ChatGPT, but what else am I missing? It feels like the early 2000s, when I was in a white-collar job and my colleagues didn't know how to use Google well, and I thought that was crazy. Now I'm having the same hesitation.



Anonymous

Figure 2 – Current Approach to Implementing AI

Piloting, with a subset of the team using it daily



Individuals are using in an ad-hoc manner without formal departmental-wide adoption



Taking advantage of AI capabilities in our existing tech stack, but little/nothing more



Significantly overhauled our function, using dedicated AI tools in team's daily activities



Planning/evaluation mode but not formally implemented at departmental level



Not using or planning to use it in a formalized manner



Q: Which of the following best describes your department's current approach to implementing AI?
(n = 12, multiple responses accepted)

Focused on Telling the Story of Their Own Product

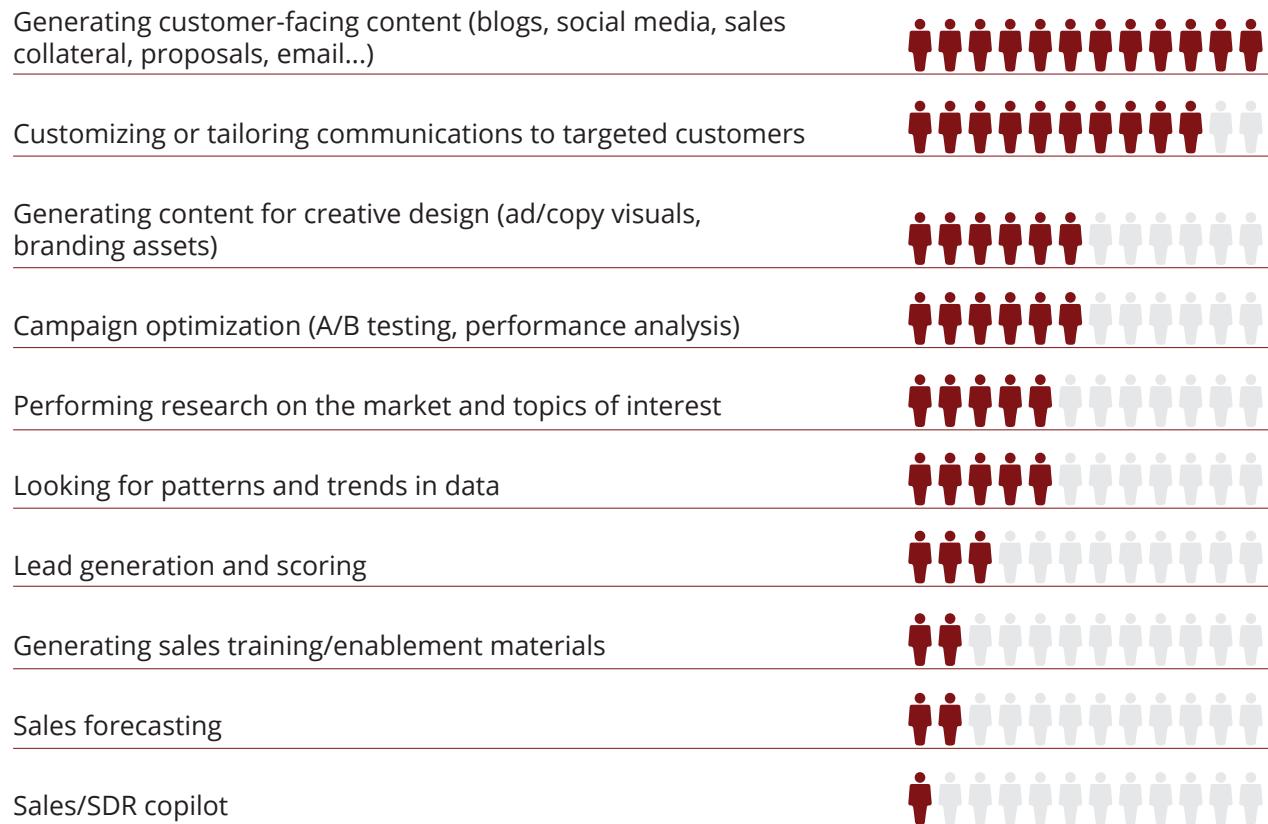
The initial focus when generative AI hit the scene a few years back was to understand how the technology can and should be used in the technology vendors' products themselves, and to tell the story in an effective way. We saw a period, starting about a year ago, in which every technology vendor simply needed to have an AI story as table stakes. More recently, this has pivoted to the need to have an AI story that makes sense and supplements the overall value proposition of the company's offering. This has been a huge pivot point for marketers, and they understandably put the bulk of their initial focus here.

Now we are at the point where much of that work has been accomplished, and marketing leaders have the relative luxury of thinking more about their own department and its operations, and how AI can make their teams more productive and effective.

Use Cases: Content Generation Leads the Way

While the use of AI in marketing teams is still largely experimental, organizations are beginning to use AI in a variety of use cases, including campaign optimization, performing research on the market, looking for patterns and trends, and even lead generation and scoring. One of the organizations we spoke with is evaluating it to supplement or even replace its SDR/BDR team. But far and away the largest use case, mentioned by every one of the organizations we interviewed, is for content generation (Figure 3).

Figure 3 – AI Use Cases in Marketing



Q: To the extent you are using or planning to use AI in your department, which of the following use cases are you pursuing?
(n = 12, multiple responses accepted)

Most of this content development is being performed on one of the leading LLMs (large language models), such as ChatGPT or Google Gemini. Some organizations started out thinking that they could replace their content teams more or less entirely, but after some experimentation, they discovered that to get quality content that's on-brand for their organization, it's important to keep humans in the loop. But LLMs are being used to get a start on content so the writer doesn't start with a blank page, to research content, and to provide the final "polishing pass." There was near-universal agreement that the content-development function is more efficient and more effective when AI plays a role.

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In marketing, we're only thinking about AI from a content perspective. I'll be interested in hearing from your other respondents what they are doing.



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Taking Advantage of AI in the Tech Stack

The other major way respondents are using AI is by taking advantage of the AI capabilities that marketing tech stack vendors are now including in their offerings. This offers the benefits of being provided “for free,” since the capabilities simply show up with new releases, and of being embedded in the tools that the team is already familiar with and using during its day-to-day operations.

Some of the tech stack components that respondents credited with enabling them to use newly released AI capabilities are found in Table 1.

It’s notable that many of the companies interviewed, including Docusign, Enlyft, Grammarly, Wrike, and ZoomInfo, are not only building AI capabilities into their own products, but are also important beta testers/early adopters of their own solutions. These respondents all mentioned how they are leveraging the AI capabilities in their own offerings as part of their marketing function.

Table 1 – AI-Enabled Applications in the Marketing Tech Stack

Tool	AI Capabilities/Use Case
6sense	Improve account prediction, scoring, and actions to take; identify potential leads based on buyer intent
AlphaSense	AI-based marketing intelligence platform; streamline research and analysis by providing advanced insights and trend detection
Asana	AI-assisted project management; prioritize tasks and streamline task management
BoostUp	Sales forecasting and pipeline management; better assess likelihood of hitting quarterly targets
Claude	Natural language processing; improve campaign copy writing
Eloqua	Optimized marketing optimization with personalized outreach, campaign recommendations, and predictive insights
Enlyft	Enhanced account-based marketing through account prediction, selection, and recommended actions to take
Gong	AI-enabled customer interaction and sales insights, predictive analytics, and workflow enhancements
Google Workspace	Embedded AI for content creation: prompts, reminders, proposed sentence completion
Grammarly	Content generation and general writing assistance with context-aware suggestions and tone adjustments
Highspot	Improved sales enablement with personalized content recommendations, just-in-time content, and advanced analytics
Jasper	Streamlined, enhanced, and personalized content creation
LinkedIn	Account prospecting: AI-enabled insights based on impressions, engagement rates, etc.; content recommendations; company overviews
Outreach	Sales engagement: improved analytics on audience messaging response, predictive analytics, and personalized communication
Qualified	Real-time sales conversations with personalized insights, automated lead management, and predictive intent analysis
SalesLoft	Sales conversation intelligence and insights, personalized coaching, and automated sales workflows
Wrike	Enhanced project management with intelligent task prioritization, automated workflows, and real-time insights
ZoomInfo	AI capabilities include advanced data enrichment, LLM interface to feed/guide user to insights, and automated lead scoring

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Our biggest AI use case comes from using our own product, prioritizing accounts in the market, understanding who to go after, and aggregating mountains of data to provide insight. We use it to marry signals from first-party and third-party data. AI is really good at summarizing that type of data.



Jam Khan

SVP Portfolio Marketing, ZoomInfo

Campaign Optimization, Intelligence, and Lead Scoring

Even as content generation is the leading use case, a number of participants are already realizing value in more exotic use cases surrounding generating market intelligence, lead scoring, and campaign optimization. Many of these use cases are enabled by the use of AI in their existing applications, but they are realizing value nonetheless. Some are looking at SDR engagement and analyzing win rates and lead quality.

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Our primary goals in using AI are to shorten the time to close deals and be very clear and crisp about who are the right companies to target and why. Now I have the data and scores to back it up.



Michael Schultz
CMO, Enlyft

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The data gives you really good insight into A/B testing so you can invest in really understanding how people respond to different offers, where they are matriculating along their journey, and where they are falling off along the way. We are still using traditional measurement methods but will be more deliberate about engagement and intent signals for conversations with our SDRs, customer service professionals, solution consultants, and account executives.



Julie Knight-Ludvigson
CMO, Culture Amp

Most Adoption Is Bottoms-Up, But Corporate Initiatives Abound

In our interviews, we explored the genesis of AI adoption in marketing organizations; for example, probing on whether it was in response to tops-down mandates from the CEO or Board. Instead, we found that in every organization we spoke with, AI adoption has been largely a bottoms-up initiative. Most interviewees pointed to “AI-forward” power users within the organization who appointed themselves to play around with tools and start bringing them into the department in an ad-hoc manner. These efforts then pulled the rest of the department along, spurring more widespread adoption.

Four of the respondents spoke of corporate-wide initiatives to adopt AI across the enterprise. Most of these initiatives are run by IT organizations, with marketing contributing a member—usually head of marketing ops or the CMO’s chief of staff—to sit on these task forces. A few respondents spoke of the cross-pollination value of these task forces, with marketing sometimes learning about useful new tools, or sometimes providing valuable learnings to other departments within the enterprise.

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Like many marketing organizations, our journey started with experimentation. Many of the platforms in our marketing tech stack have embedded AI functionality, and we’ve been using those tools for years. The big change came when generative AI became hands-on for everyone on the team. We started experimenting and learning in unstructured ways—playing with ChatGPT, Claude, Writer, and other tools—and have quickly operationalized GenAI into all our programs.



Amy Heidersbach
CMO, Dice

Efficiencies, Metrics, and Measures

Everyone we spoke with believes that AI will enable their teams to be more efficient in their jobs, and nearly all also believe that it will make their organizations more effective. Most believe AI will provide significant productivity gains and will speed up marketing tasks such as account prioritization, data summarization, and content generation.

But when pressed to share specifics around efficiencies they have actually realized, or even those they expect/plan to achieve, none of the respondents could provide specific answers. While many respondents believe that their teams are being more efficient with the use of AI-enabled tools, no one we spoke to has actually downsized headcount due to efficiency gains.

That said, several respondents said that they have been able to scale their marketing functions' output without scaling their marketing team's headcount accordingly—i.e., they believe they are currently doing more with less. And in those areas where organizations are pointing to efficiency gains, they are almost exclusively centered around the content team. One respondent even said their headcount has increased very slightly while their teams get their arms around the tools and how to best use them.

One respondent holds the philosophy that as of right now, it's too early to try to put hard metrics or goals against the use of AI in their organizations. Instead, they believe it's better at this stage to let people be innovative in their approach to the technology and to have free reign to experiment with how best to use the technologies. Putting too many guardrails around the use of the tool could constrain its use in the organization, and companies that are too restrictive may miss out on the opportunity to leverage the next big thing in AI.

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The use cases are fresh, new ideas are being created, and the pace of learning and adoption is the most important thing. I don't want to put specific KPIs on people, because it might constrain and restrict them. We want this to be about innovation and learning.



Lena Waters
CMO, Grammarly

Our primary goal is productivity. Our team is fatigued, a little burned out. We have been running at a fast pace. Even though this is asking them to do another thing, ultimately it takes things off their plate. That's the way I'm choosing to see it.



Anonymous



Barriers and Challenges

Respondents acknowledged that incorporating AI into their function doesn't come without some barriers and challenges. They surfaced a wide range of obstacles, spanning from limitations of the tools themselves to the ability of teams to focus on and adopt them, including:

- **Making the time for it.** Busy marketing teams need to be able to find the time in and around their day jobs to evaluate different tools and learn how to incorporate them into their processes. And the change management process itself represents a disruption to their organization.
- **Lack of differentiation.** Respondents noted that AI-generated content is not original, and using the technology for content generation runs the risk that everything they create will "sound the same."
- **Leveling the playing field.** With widespread adoption of AI tools, even less-than-superstar marketers can take advantage of excellence in content generation, lead generation and scoring, campaign optimization, and other critical aspects of marketing. This increases the pressure on marketers to stand out and differentiate themselves from their peers.
- **Making the transition.** While AI offers the ability to do things better than we could in the past, there is the matter of adopting the tools, maintaining them, and training employees on how best to use them. This requires marketing leaders to prioritize use of the technology and for teams to find the space to disrupt their current activities and retrain themselves on new ways of doing their jobs.
- **Data security and leakage.** Marketers are uploading a lot of information about their business into LLMs, and some are concerned about the risk that sensitive information could find its way into a customer's or competitor's feed at some point.
- **Potential for hallucinations and inaccuracies.** When using LLMs for information gathering and lead scoring, respondents note that even with recent advances, there's still the risk of hallucinations and other inaccuracies. One respondent noted that you need to be okay with accuracy that is 90 percent "good enough."
- **Cultural acceptance.** Some respondents note that use of LLMs and other tools may feel like "cheating" to some marketers, and that some marketers may not feel like they are doing their job if they are too reliant on AI.
- **Keeping up to speed.** Especially given the rate of change and rollout of new AI-based tools, as well as capabilities of existing tools in the tech stack, there's a constant need for re-education to maintain awareness of what's available.

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It takes time to adopt and tune AI in your marketing organization. You have to actually change the way you go about doing things. It's like going from horse and buggy to a car. You can go a lot further a lot faster, but doing so requires a new set of skills. Similarly, developing skills to leverage AI can have a profound impact.



Michael Londgren

CMO, Responsive

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One of the biggest challenges is making the time for it. Teams are heads-down executing their current activities and don't have space to take a step back to evaluate how to use it and how other companies are using it.



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Looking Forward: The Potential to Change Everything— This Time for Real

Everyone we spoke with agrees that it's early days and that the majority of the story of how AI will affect marketing is yet to be written. Use cases that are merely a concept today will become a reality in three to six months, and even more profound changes are likely to occur over the next three to five years.

In the second half of 2024 and early 2025, respondents expect to use AI for more complex use cases like attribution measurement, advanced predictive analytics, and customer journey optimization, potentially transforming areas like demand generation and website functionality. They will have better insights on prospects and competitors. Lead generation will become more effective as marketers get a better sense of what signals are working better than others. Some respondents expect the SDR function to become entirely automated.

But there's an even larger question at hand. Two or three respondents pointed out that the more fundamental question is how AI will change the face of marketing itself. In the future, it has the potential to dramatically alter the way customers learn about products, and therefore how we take products to the market. During their information-gathering process, customers may shift reliance away from the web, search engines, and social media to LLMs, which could have profound implications on companies' website, social media, communications, branding, paid search, and SEO/SEM strategies—perhaps even making some of these disciplines obsolete.

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For marketers, we need to pay close attention to what is happening in AI. It's clear to me that the way we work, search, and find information is going to completely change in three years' time. Web searches will be less relevant as people use publicly available LLMs. Customer acquisition will be changed, and organic and paid search will be entirely different. Even getting brand discovery will change. I don't see a lot of marketers pulling back and thinking about how marketing is going to change.



Amy Holtzman
CMO, CHEQ

It's going to be hugely disruptive on the buy side. What rattles me is what this means in terms of ad engagement and addressability and brand opacity when everything is accessed via an LLM. What does this mean for websites and viewing ads? It has the potential to really disrupt how we think about reaching audiences.



Jake Sorofman
CMO, Visier

Recommendations

Callan Consulting has five primary recommendations for senior marketing executives coming out of this study:

- 01 It's not too late to start.** While AI has been a primary focus for technology firms for the past two years, and things are evolving rapidly in the use of the technology, marketing organizations have been relatively slow on the uptake for their own use; teams just now getting on the bandwagon have not lost much ground. Still, other teams are moving rapidly, so it is best to start now. Delaying adoption any further does put you at risk of falling behind.
- 02 Give yourself and your team license to learn and experiment.** Don't be too prescriptive when setting goals and boundaries. The use of AI in marketing is going to look very different in 12 or 24 months, and those who are too restrictive in terms of expectations to their team may miss out on important uses of the tool. Now is the time to be innovative in your mindset: find the AI-forward individuals on your team and allow them to play with the technology and apply it in different areas.
- 03 Focus on the present but think about the future.** With things changing so rapidly, it seems a daunting enough task to get your arms around the many ways that AI can make your team better marketers today, and that alone gives you enough to focus on. At the same time, we are only now starting to scratch the surface of how AI may ultimately transform the marketing function, and it's important for all marketing leaders to continually educate themselves on the state of the art in AI for marketing, as we will all be relearning our profession in five years' time.
- 04 Leverage what you have in your tech stack while developing a broader strategy.** The good news is that nearly every marketing organization today has inherited capabilities being built into tools they are already using in their technology stack. But simply relying on these capabilities in an ad-hoc manner is not enough; you need to think about your end-to-end processes, and while use of existing tools is certainly part of the solution you need to ensure you're using them to their fullest extent, while evaluating other solutions and uses of general tools like LLMs that you may not be using today.
- 05 Get help.** Many of the organizations we've spoken with, not just for this project but in general, are quite busy and working to do more with less. Adding fundamental changes that AI promises to bring can be difficult to fit in along with their day jobs. Whether it's to help understand the potential aspects of their end-to-end marketing functions where they should be using AI or to provide assistance implementing and getting trained on new AI-enabled tools, getting outside expert assistance can help jumpstart your AI operations and enable you to get to value sooner.

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Don't wait. Go now. Embrace AI and start with ChatGPT. Look at the AI capabilities in your business applications and tap into them. Identify AI-forward thought leaders on your team and give them the opportunity to evangelize new capabilities. It's a period of rapid exploration and trial and error and continuous improvement.



Michael Londgren
CMO, Responsive



Conclusion

AI is on the verge of transforming the marketing landscape, offering significant opportunities for increased efficiency, deeper customer insights, and improved campaign performance. While we detected a bit of posturing in some of our interviews, with marketing leaders taking care to portray their teams' activities in the best light, it's still clear that the potential for AI to fundamentally change core marketing functions is there.

Realizing this potential, however, requires a commitment to experimentation, education, and strategic foresight. Marketing leaders must empower their teams to explore AI-driven tools and processes while preparing for the broader, long-term disruptions AI will bring. Companies should begin by taking a proactive approach to incorporating AI in their operations today, and they should look outside for help if they have insufficient skills or bandwidth to ensure they are in the best position to capitalize on this upcoming sea change.

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Be the disruptor, not the disrupted.



Jake Sorofman
CMO, Visier

If you haven't started, you're too late. The most successful marketers will be the ones that fully embrace AI and get the most out of it. If you're not conversant in it, you're no longer good at your job.



Michelle Maggs
Vice President Corporate Marketing, D-Wave

Appendix A: Study Methodology

The findings in this study are based on interviews with 12 CMOs and marketing leaders, conducted in August and September 2024. Respondents were recruited from the broader Callan Consulting ecosystem and were promised a copy of this report. Interviews ranged from 30 to 60 minutes in length. The breakdown of respondents can be found in Table 2.

Table 2 – Interviewee Breakdown

Company	Respondent Title	Company Focus
CHEQ	CMO	Go-to-market security
Culture Amp	CMO	Employee experience and engagement
Dice	CMO	Online talent acquisition
Docusign	VP, Product and Partner Marketing (former)	Electronic signature and intelligent agreement management
D-Wave	VP, Corporate Marketing	Quantum-based optimization
Enlyft	CMO	B2B customer acquisition and account intelligence
Grammarly	CMO	AI assistance
KarmaCheck	CMO	Background checks and screening
Responsive	CMO	Strategic response management software
Visier	CMO	People analytics and workforce planning
Wrike	CMO	Project management software
ZoomInfo	SVP, Product Marketing	Company contacts and intelligence

Appendix B: Lessons and Observations on Using AI to Develop This Report

Callan Consulting is no stranger to the use of AI as a productivity tool; we have been using it both as a content development assistant and a method of researching the market and topics of interest since shortly after LLMs became generally available. While we have a healthy appreciation of its (current) limitations, we also appreciate its value in making us more effective and efficient consultants, and this report is a good case study in the strengths and weaknesses of the current tools on the market.

For this report, we used generative AI in several ways, throughout the study. The primary ways we used it, along with letter grades and observations on the technology, follow:

- **Capturing and summarizing interviews: Grade B-**. We used several different commercially available tools to listen to our interviews/read the transcripts and create summaries for the team's analysis benefit. Most of these tools resorted to "Ed and John discussed XYZ" without capturing the crux of what the respondent said, at least not to the extent that it would be helpful to this report. Overall, while the tools promise to be helpful, we don't find them sufficient to fully capture interview content—yet, at any rate.
- **Initial outline/content draft: Grade C+**. For fun, we decided to let the tool take the first crack at an outline for this report, experimenting with several prompts to improve the results. The result was a fairly generic outline, including placeholders for appendices, acknowledgements, references, and—our favorite—the evolution of AI in marketing. You'll notice that we didn't actually include a discussion of the evolution of AI in marketing in this report, and at the end of the day, we felt like we knew how to structure and create a first draft of the report better than the machine.
- **Targeted research: Grade A**. The respondents gave us a high-level overview of the elements of their marketing tech stack where AI capabilities "came along." Callan Consulting is familiar with the majority of these tech stack elements, but we ran the entire list through an LLM to help craft a one-line description of the use case for AI in each offering. The LLM did very well in this task.
- **Writing the executive summary and conclusion: Grade B+**. Like most authors, we generally write these pieces after the body of the report is complete, and we thought this would be a good task for our LLM. It certainly did a good enough job, and had we published the report with what it created, it would have passed the red-face test. However, those versions were constrained by the fact that they only summarized what was in the body of the report and didn't (couldn't) bring additional context or personality, including the introductory paragraphs in which we touch on how gen AI has changed the landscape recently and posed the question of whether marketers are eating their own dog food. Maybe we're perfectionists, but while AI gave us a good start, we still like to write the substantive pieces ourselves.
- **Rewriting/polishing final report: Grade B**. Our LLM actually did an okay copy editing job, although (false modesty aside), it had a pretty clean document to start with. We asked it to perform a copy edit, and explicitly not to perform a rewrite, and the output would certainly pass the red-face test if it were found published in any one of a number of major publications. It was clean, straightforward, and adhered to the conventions of well-written business English. BUT—it seemed to make arbitrary changes, where the final word choice was no better than the original (our human editor wisely left those alone), it was much more edit-happy than our human editor (who had the knowledge and experience to fix only what needed to be improved upon, and not change the tone of the original),

and most problematically, it did wash out much of the tone and personality of the original. For example, the LLM did not let the “false modesty aside” aside found at the beginning of this paragraph through and transformed intentional fragments into bland, complete sentences, losing their emphasis. Moreover, it removed some of the more colorful analogies like “marketers eating their own dog food,” and in some instances actually changed the meaning of the document (for example, it said that AI provided a good starting point for the executive summary and conclusions but that we refined the final versions; we actually said that while AI gave us a good start, we like to write the substantive pieces ourselves).

Our own bottom line conclusion is that the technology is not about to put us out of jobs (yet, at least). This is consistent with our experience with the technology over the past six to nine months. Now, it may be that we are hard graders, and we do strive to put our best foot forward in terms of the quality of all our deliverables. We can see that in certain instances where you merely need “good enough” content, the AI output may be adequate. For us, however, it best serves as a helpful tool by giving us a jumping off point and helping to ensure that we haven’t left critical items off the list; it also gives us a leg up on research and intelligence.

So yes, while AI was used to some extent in the creation of this report, at the end of the day, the content you find here was generated, and edited, by humans.

+ Callan Consulting

About Callan Consulting and Our AI in Marketing Advisory Service

Founded in 2000, Callan Consulting provides a wide range of marketing assistance services to B2B technology companies, with a particular emphasis on product marketing. With clients ranging from household names like DocuSign, Seismic, IDC, and SAP to early-stage series A/B startups, Callan Consulting has helped hundreds of technology companies over the course of thousands of engagements to maximize their success in the market.

Callan Consulting offerings range from marketing strategy to messaging and positioning, market research, customer-facing content, go-to-market and launch support, competitive assessments, value-based selling, and sales enablement. Most recently we have launched an AI in Marketing Advisory Service, in which we perform an audit of our clients' end-to-end marketing operation and work with them to develop a strategy for how to better incorporate AI into their marketing efforts, complete with objectives, action items, owners, milestones, and success metrics.