

**AGENCY OPS:
INTEGRATING AI INTO
YOUR AGENCY
WITHOUT
OVERWHELM**

**AI for
Agencies
Summit™**

A Marketing AI Institute Event

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Interactive



**Our Mission at Seer
Interactive**

We're Here To Unlock Potential

We are a transformational digital consultancy, leveraging data, technology and AI to invent new ways to approach SEO, Paid Media, Analytics and Creative Services, in an ever-changing digital landscape.



How Seer Embraced AI by Building on a Foundation of Data & Innovation

- **4 investments Seer made in 2023 that set us up for success**
- **4 investments Seer made as part of our AI Council work in 2024**
- **Upcoming 2025 Investments**

Early Results

Seer's AI efforts started this time last year and have contributed to the following results

47% of Seer
Clients Opted
In to AI Use
with
non-public
data

88% Overall
Workplace
Experience
Score

29% of SEO
Deliverables &
Workflows
Augmented
with AI

94.9% Client
Retention, up
9% YoY

4 bets we made in 2023 that paid off

We unknowingly laid the perfect groundwork for all things AI in 2022-23

**Developed
Agency-wide
Resource
Management**

**Prioritized
Time Tracking
Improvement
& Enforcement**

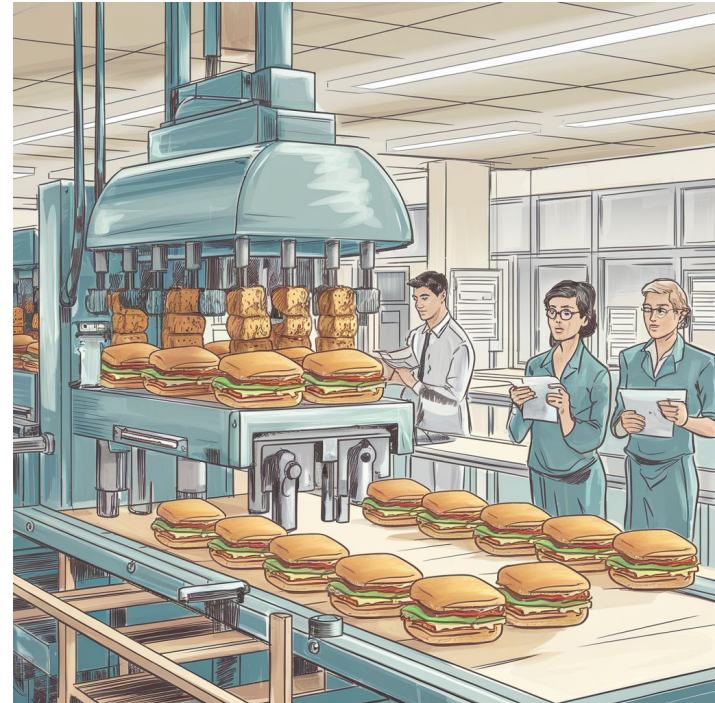
**Rekindled a
Culture of
Innovation &
Hypothesizing**

**Created an AI
Policy Focused
on Safety &
Flexibility**

1. Consistent Resource Management System

A great idea is only as powerful as the team ready to change with it

- Transitioned to **Wrike** for task management for full agency
- **Blueprints** created for all tasks to ensure consistency + enable change management
- Effort led by our **Director of Agency Operations**, Jacob Bodnar, with SME support from our Project Management Division



2. Commitment to Time Tracking

Time tracking isn't just numbers; it's the story of progress and impact.

- Make it as **easy as possible** for the team. Solicit input and feedback while being clear about the non-negotiables
- Ensure the data will **answer critical questions**. Start with the answers you need and ensure your data collection aligns.
- Be clear about the **timeline for change**. For example, start with a four week buffer period. Review weekly. Positive reinforcement. Be clear about implications for failure to comply.

3. Culture of Innovation

In a culture of innovation, the best ideas aren't just created; they're championed.

- Understand that **efficiency and innovation will always be at odds**. Ensuring the right balance is an art and a science.
- Embrace top-down idea sharing & collaboration, synchronously & asynchronously
- If Innovation is an expectation, ensure it's hard coded in **role expectations**
- Secure top-down commitment to stay cutting edge, even when it makes things harder and **less profitable** in the short term

4. An AI Policy with Flexibility

Flexibility in our AI policy isn't optional—it's how we future-proof our innovation.

- Developed in Q4 2023 with input from several different legal counsels + Marketing AI Institute
- Refrained from 'hard coding' specific data sources & AI platforms to enable us to stay flexible
- **"Take it or leave it" approach**
- Build advocacy with "AI Road Shows" (more to come...)

4 bets we're happy we made in 2024

Several key initiatives complimented the advice from MAll very effectively

**Dedicated
Individuals on
AI Council
with
Disruption
Targets**

**Created a
Custom L&D
Program for
Seer Team**

**Presented
Dozens of AI
Road Shows to
Solicit Opt Ins**




**Disruption
Analysis &
Base Level
GPTs**

1. Create an AI Council

When everyone is responsible, no one is accountable.

- Established in January 2024
- All council members had deep experience with Seer's culture & clients and at **least 25% dedicated to other divisions**
- 5 Pillars: Research & Development, Learning & Development, Change Management, Risk Mitigation, & Client Delivery

GenAI at Seer: GenAI & Working Group Leaders
Seer is dedicating 1.25 FTEs to this effort, in addition to council members and new technology

		
Alisa Scharf: Leading overall direction and approach to Gen AI at Seer, including Steering Committee, AI Council & Working Groups (Focus: Change Management)	Lauren Konyves: Leading Client Delivery & Risk Mitigation Group	Jordan Strauss: Leading R&D Group

2. Custom L&D Program for Seer Team

Learning is most powerful when it starts from where the learner stands.

- Started with our outlook on how AI will impact all divisions at Seer and marketing as a whole
- Balanced **fun & practical** support
- **1 hour per week** keeps a steady pace of learning while maintaining our billability and productivity targets
- All L&D managed through Seismic for easy compliance review

3. Host Client Opt In AI Roadshows

Each roadshow is a customized journey that brings clients into the heart of our vision.

- Add value, make our client the champion, offer training & resources at no additional cost
- Help clients understand the **before & after state**
- Illustrate the scenario with a more tangible example related to changes to search

4. Disruption Analysis & Base Level GPTs

With base level GPTs, we're not just streamlining work; we're blazing a path for new ideas.

- Inspired by the Moderna & OpenAI case study
- Disruption Analysis identified **170 opportunities**
- **Base Level GPTs** were our solution to enable the team to adopt the technology at a slow and steady pace

Seer Disruption Analysis

Item	Division	SubDiv
Critical Issues Audit (Analytics)	A&I	MAS
GA4 Audit (Analytics)	A&I	DMS
A/B Testing Check-in Reports	PDM	PDM 2.0
TSEO Migration: Redirect Mapping	TSEO	TSEO
Ad Strength	PDM	PDM 2.0
KPI Development	SEO	SEO
Social Health Score		
* Efficiency Audit	PDM	PDM 2.0
Search Health Score		
* Efficiency Audit		
* Ad Strength	PDM	PDM 2.0
1st Party Data Audit	A&I	DMS
SEO Monthly Report	SEO	SEO
Paid Media Asset Production	CRE	CRE
Prioritization Matrix	SEO	SEO
Keyword Matrix	SEO	SEO
SEO Driven Content	CRE	CON
Placement/Domain Analysis (Prog, GDN, etc.)	PDM	PDM 2.0
GTM Audit for Site Performance	A&I	DMS, MAS
Search Query Efficiency Audit	PDM	PDM 2.0
Monthly Burn Report	All / CE / PM	PM
Monthly Renewal Updates	All / CE / PM	CE
Budgets/Pacing	PDM	PDM
Monthly Topic Opportunity Analysis	SEO	SEO
Weekly Client Digest	All / CE / PM	CE
Ad Fatigue Analysis (Paid Social)	PDM	PDM 2.0
SEO Reporting Setup [MAS]	A&I	MAS
Ad Extension Analysis	PDM	PDM 2.0

A digital marketer's consideration set for base-level GPTs

Base-level GPTs are a starting point for more customized applications, are accessible for all skill levels and can serve as great training.

- 1 **Internal Reviews & Revisions** – using analysis pause points, QA checklists, and expected revisions to ensure quality and adaptability to client feedback.
- 2 **Presentations** – focused on crafting compelling narratives, ensuring slide quality through thorough QA, and anticipating potential objections to make our decks both persuasive and impactful.
- 3 **Data Manipulation** – emphasizing manual excellence in data handling, cleaning is essential for accuracy, and organizing data varies based on context, balancing objectivity with subjectivity.
- 4 **Analysis** – creating multi-format audits that often require translation across formats—spreadsheets, documents, and slides—to meet stakeholder needs.
- 5 **Insight & Recommendation Generation** – creating tailored “State of Search” reports, aligning stakeholders via detailed project briefs, and ensuring clarity with organized action items from meetings.



Seer's Base Level GPTs

Slidedeck Outline GPT

Problem: Presentations are time consuming to create, and building a powerful narrative takes experience.

Solution: Users can use natural language to explain the message they want to convey. Output is an outline to follow to simplify deck builds.

Project Brief GPT

Problem: In an asynchronous, remote world it can be easy to misunderstand an assignment.

Solution: Users can create a consistent, thoughtful project brief that ensures we get to the root of the goal of the deliverable - not just a copy & paste of a brief from the past.

Meeting Recapper GPT

Problem: We receive valuable insights in client conversations, but documentation is time consuming.

Solution: Users can upload a transcript from any conversation and receive a client-ready recap as well as insights that should be routed to our knowledge management system.

If you want to successfully integrate AI into your organization

- **Appoint an AI Council.** Give folks dedicated time. Make them accountable to disruption targets.
- **Conduct a Disruption Analysis.** Identify the most meaningful opportunities.
- **Invest in Learning & Development** for your entire organization.
- **Prioritize the role of Agency Operations.** That is the glue which will make it all stick.

Looking ahead to 2025

Here's what we're looking to in the future and how we are preparing

**Documenting
Standard
Operating
Procedures**

**Integrating AI
with our Data
Platform**

**Exploring
Model
Agnostic R&D**

**Testing
Agentic
Solutions**

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Seer Interactive

**We appreciate
your session
feedback!**

