Building Your AI Toolkit:

A Starter Guide for Marketing Teams

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Welcome

This guide offers practical tools, training resources, and best practices to help your marketing team integrate AI into daily workflows. Whether you're just starting or looking to expand your use of AI, this toolkit is designed to support you with trusted resources and actionable next steps.

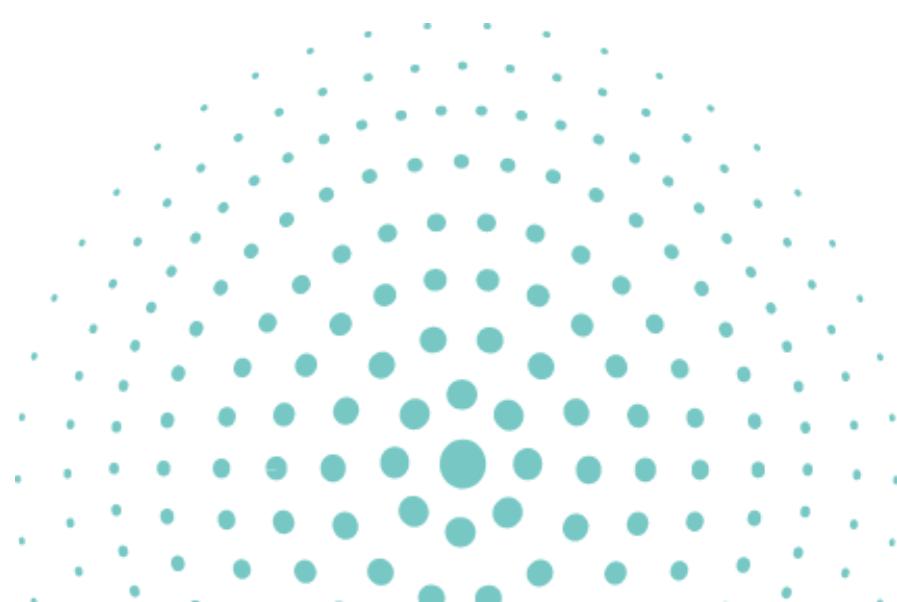**Feel free to share this within your own organization.**

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Courses

- **HubSpot's AI for Marketing:** A free course that teaches the basics of using AI to enhance your marketing workflow. Thorough discussion of prompts and tools. Free!

- **Marketing Artificial Intelligence Institute:**
  - **Intro to AI:** This free course introduces their paid courses but provides value, not just a sales pitch.
  - **Piloting AI:** A "get-started" package of on-demand lessons for beginners. $299
  - **AI Mastery Course:** A membership to the Institute's full training suite. $999 each or $399 per person for groups of 5 or more users.

Reading (+ watching and listening) list

- **From Aha Media Group:**
  - **A Tactical Guide for the Future of Healthcare Search:** 19-page guide to changes in SEO and content
  - **The New Patient Journey: Strategies for Healthcare Marketers in an AI-First World:** Co-authored with Kyruus, an 8-page guide to adapting your physician search strategy for AI search
  - **Ultimate Guide to AI for Healthcare Marketers:** Our AI resource hub

- **Other resources:**
  - **The Artificial Intelligence Show** (podcast)
  - **Decoding AI for Marketing** (podcast)
  - **Generative AI for Content Marketers: 10 Ways to Use AI for Productivity and Performance** (webinar from Andy Crestodina)
  - **Create and Stack Custom GPTs in ChatGPT** (Intermediate to Advanced YouTube tutorial)

AI leaders to follow

- **Allie K. Miller**: AI leader and advisor specializing in business applications of AI. Shares practical, business-focused insights on LinkedIn and Substack.
- **Andy Crestodina**: Co-founder of Orbit Media. Expert in content strategy, SEO, and digital marketing with a thoughtful perspective on how AI is reshaping marketing.
- **Kathleen Perley:** Founder of DeMystifAI. Specializes in helping healthcare and marketing teams integrate AI strategically and responsibly.
- **Paul Roetzer**: Founder of the Marketing AI Institute. Great source for AI education, trends, and use cases for marketers.
- **Katie King:** Author of Using Artificial Intelligence in Marketing. Offers insights into AI's impact on customer engagement and marketing strategy.
- **Christopher Penn**: Co-founder of Trust Insights. Shares deep, technical, but approachable advice on marketing analytics and AI adoption.
- **Lacey Reichwald**: (That's me!) I try to share practical applications of AI and amusing anecdotes about AI's shortcomings.

8 steps to get your team started

1 Form a cross-functional workgroup

Bring together team members from marketing, communications, digital, and operations to guide decisions.

2 Choose clear use cases

Focus on supportive tasks like research, outlining, summarizing, idea generation, or campaign reporting — not drafting final content.

Note: Choosing tasks and use cases before evaluating tools is important. Otherwise, you may identify a problem that doesn't need solving, simply because you have a tool to solve it.

3 Evaluate and select tools to test

Test a few AI tools that align with your needs. Prioritize ease of use, data security, and customization of outputs. Document individual tests and compare notes.

4 Pilot tools with a small team

Start with a short pilot project. Set clear goals, track results, and limit use to specific tasks.

5 Create simple guidelines

Define basic expectations for responsible AI use, including review processes and brand voice alignment.

6 Gather feedback and adjust

After the pilot, refine your approach based on user feedback and observed outcomes.

7 Document and train

Schedule a training session to instruct team members on how to utilize the tool. Record the training and use AI to turn your transcript into written training materials and standard operating procedures.

8 Share successes across the team

Highlight early wins and lessons learned to build understanding and encourage adoption.

Picking the best tool for the job

ChatGPT	**Thought partnership & ideation:** Excellent brainstorming, custom GPTs/assistants, repurposing content, and refining drafts.
Claude	**Content repurposing & summarization:** Long context window (can handle books/long reports), strong for rewriting and simplifying.
Copilot	**Internal workflow & automation:** Deep integration with Outlook, Teams, Word, SharePoint; automates daily tasks; custom Copilots.
Gemini	**Workspace productivity & research:** Native integration with Gmail, Docs, Sheets, and Slides; combines Google Search with AI.
Perplexity	**Research & fact-finding**: Real-time web results with citations; fast, accurate summaries of sources.

Closing note

Integrating AI thoughtfully into marketing workflows can drive significant efficiency, creativity, and strategic insight.

Thinking **AI-first** in your workflows will help you get more comfortable while you learn where AI tools are most helpful. But always think **human-first** in your content. Healthcare communications is about trust, support, and empathy. Only humans can create those.

If you have questions or would like help designing an AI pilot program for your team, please reach out to your account team.

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