

# The AI Opportunities Checklist

**Find the signal. Build what matters.**

A practical worksheet for B2B marketing teams that want to use AI and automation without creating more noise, risk or operational debt. Use it to identify where automation will actually improve speed, quality, governance and measurement.

## 1. Map the real work

- Where does campaign work slow down repeatedly?
- Which steps rely on undocumented judgement?
- Where do teams copy, paste, rebuild or re-check the same thing every week?
- Which approvals protect quality, and which only protect habit?

## 2. Find the missing signal

- Which data points reliably indicate customer intent?
- Where do segments drift because the source data is unclear?
- Which reports describe activity but not business impact?
- What would help the team make a better decision faster?

## 3. Separate useful AI from theatre

- Can the use case reduce manual work without reducing accountability?
- Is there a human review point before anything customer-facing goes live?
- Can the team explain how the output was produced, checked and approved?
- Does this use case support a workflow, or is it just a novelty demo?

## 4. Prioritise automation candidates

- High-volume, low-risk, repeatable tasks should move first.
- Customer-facing, compliance-sensitive work needs stronger governance.
- Do not automate broken logic. Fix the process before scaling it.
- Prefer small, reliable systems over impressive prototypes.

## 5. Build the 30/60/90-day plan

- First 30 days: remove obvious bottlenecks, document core rules and define safe AI use cases.
- Days 31-60: rebuild the highest-friction workflow and create QA templates.
- Days 61-90: connect reporting to outcomes, train the team and establish an optimisation rhythm.

### Opportunity scoring matrix

Opportunity	Impact	Risk	Effort	Priority
Automated campaign QA checklist				
Lifecycle nurture rebuild				
AI-assisted brief generation				
Segmentation clean-up				
Performance reporting refresh				

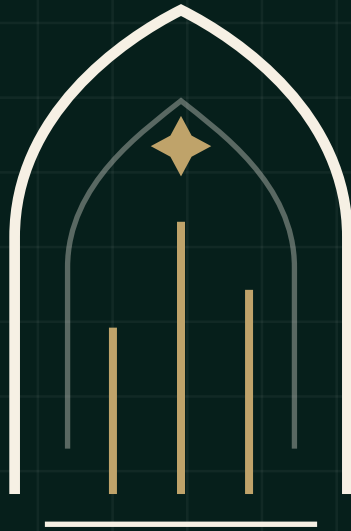
**The best AI opportunity is rarely the flashiest one. It is usually the workflow that happens often, consumes skilled time, creates avoidable errors and can be improved with clear rules.**

# 30 / 60 / 90 day action plan

Period	Focus	Actions
Days 1-30	Audit and stabilise	Document the workflow, name the bottlenecks, define safe AI use cases, re
Days 31-60	Build and govern	Create templates, QA rules, approval paths, prompts, data checks and jour
Days 61-90	Measure and adopt	Train users, connect reporting to decisions, establish a monthly optimisation

Use this checklist as a first pass. If the same bottlenecks appear across campaigns, regions or teams, that is usually a sign that the operating system needs to be redesigned - not that people need to work harder.

**Signal Chapel helps B2B teams turn those recurring patterns into practical AI-enabled marketing systems.**



# SIGNAL CHAPEL

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**CLARITY. SYSTEMS. GROWTH.**

AI-enabled marketing systems for serious B2B teams