CHEAT SHEET

12 AI Use Cases for B2B Marketing Teams

The twelve use cases grouped by goal, where to start, where to keep more human control, and four questions to judge any of them.

01 The 12 use cases by goal

Understand customers

- Research synthesis: pain points, buying triggers, objections, customer language
- Sales call analysis: top objections, competitors named, why deals stall
- ABM research: account strategy, recent initiatives, likely challenges

Produce and distribute content

- Ideation and outlining: article angles, comparison pages, FAQ sections
- Repurposing: one webinar into posts, a newsletter, sales snippets, video scripts
- SEO planning: keyword clusters, search intent, content gaps, internal links
- GEO review: does content say what you do, who you serve, how you differ?

Support sales and campaigns

- Sales enablement: battlecards, objection handling, meeting prep, follow ups
- Campaign planning: themes, segments, messaging, channel mix, test ideas

Run the marketing function

- Reporting: which channel improved, where conversion fell, what changed
- Marketing ops: CRM summaries, lead classification, content tagging, briefs
- Small team productivity: more research, content and reporting, no new headcount

02 Four questions to judge any use case

1. **Does it save meaningful time?**
   If automation saves only a few minutes per month, the complexity may not be worth it.
2. **Can the output be reviewed?**
   High value AI workflows usually have a clear human review point.
3. **What happens if it is wrong?**
   The greater the risk, the more human control is required.
4. **Does it improve the customer experience?**
   Automation should support better customer communication and better business decisions.

03 Start with tasks that are

- [x] Repetitive
- [x] Time consuming
- [x] Easy to review
- [x] Low risk
- [x] Already part of an existing workflow

04 Where to start vs where to add control

Good starting points

- Meeting summaries and CRM summaries
- Content repurposing
- Research synthesis
- Reporting commentary

Use more human control

- Customer facing communication and pricing
- Technical claims, legal or compliance content
- Thought leadership and strategic recommendations
- Brand positioning

05 Source material AI needs to work from

- [x] Customer interviews and surveys
- [x] Support tickets
- [x] Sales notes and call transcripts
- [x] Search data and keyword tools for SEO planning
- [x] Published content to review for AI visibility

06 The rule to remember

> *AI organizes and interprets material the team already has. Strategy, positioning and final approval stay with people.*

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