

USING AI FOR MARKETING

AI ROI & Performance Tracking Sheet

Objective: Use this sheet to measure the effectiveness of AI implementation, track performance metrics, and assess return on investment (ROI) over time.

Step 1: Define AI Implementation Goals

Increase efficiency (e.g., reduce manual work, save time)	☐
Improve content quality (e.g., enhance accuracy, personalization)	☐
Enhance customer engagement (e.g., chatbot response rate, personalized recommendations)	☐
Optimize marketing performance (e.g., ad targeting, email open rates)	☐
Reduce costs (e.g., decrease staff hours spent on repetitive tasks)	☐
Other:	☐

Step 2: Establish Key Performance Indicators (KPIs)

Metric	Baseline (Pre-AI)	AI-Assisted Performance	Target Goal	% Improvement
Time spent on task (hours)				
Customer engagement rate				
Conversion rate				
Content production speed				
Ad performance (CTR,				

Step 2: Establish Key Performance Indicators (KPIs)

Metric	Baseline (Pre-AI)	AI-Assisted Performance	Target Goal	% Improvement
CPA)				
Cost savings				
Other				

Step 3: Monitor AI Effectiveness

Track time savings: Compare AI-assisted workflows to manual ones.	☐
Measure content impact: Assess engagement, conversions, and quality improvements.	☐
Analyze cost reduction: Identify savings in operational expenses.	☐
Evaluate customer sentiment: Monitor feedback and satisfaction related to AI interactions.	☐
Benchmark against industry trends: Compare AI performance with standard industry benchmarks.	☐

Step 4: ROI Calculation

Total AI Investment Costs:	\$
AI software/tool costs:	\$
Implementation/training costs:	\$
Ongoing maintenance:	\$
Estimated Annual Benefits:	\$
Time savings converted to cost:	\$
Increased revenue from AI-driven campaigns:	\$
Other financial benefits:	\$
ROI Formula:	$\text{ROI (\%)} = \left[\frac{\text{Total Benefits} - \text{Total Costs}}{\text{Total Costs}} \right] \times 100$

Step 4: ROI Calculation	
Total AI Investment Costs:	\$
Projected ROI:	%

Step 5: Continuous Optimization	
Reassess AI performance quarterly to ensure continued efficiency.	☐
Update KPIs as AI usage evolves.	☐
Identify new AI opportunities to improve existing processes.	☐
Gather stakeholder feedback for ongoing refinement.	☐