

Chapter 7: Shadow AI

Table Reference

Every table from this chapter, with what it's for and how to actually use it.

Current-State AI Usage Audit

Team / Function	Tool / Platform	Problem It Solves	Owner	Scope	Effectiveness / Notes

Description: A blank inventory template for capturing every AI tool already in use across teams, sanctioned or not, including whether it's org-wide, team-specific, or individual/shadow use.

How to use it: Run this as a real discovery exercise before writing any AI policy – you can't govern what you don't know exists.

Manual Process Audit

Manual Process	Frequency	Time Spent / Cycle	Repeatability	AI Fit	Recommended Approach	Priority
e.g. Campaign list pulls & segmentation						

Description: A blank template for cataloging repetitive manual work and scoring each one’s fit for AI-assisted automation.

How to use it: Fill in with your team’s actual recurring tasks to build a prioritized, evidence-based list of what to automate first.

Where Generative AI Adds Immediate Value

Use Case	What It Does
Email & Copy Drafting	LLM-powered tools (ChatGPT, Claude, Jasper, Copy.ai) can draft email sequences, landing page copy, and ad creative in seconds. Build a review-and-approve workflow, not a generate-and-send one – human review for

Use Case	What It Does
	tone, compliance, and brand consistency is non-negotiable.
Content Personalization at Scale	Generative AI can produce persona-specific variants of core assets (e-books, one-pagers, email sequences) far faster than a human copywriter, enabling 1:few ABM personalization that would otherwise need dedicated content resources per tier.
Campaign Brief & Spec Generation	AI can synthesize ICP data, intent signals, and competitive positioning into campaign briefs and SDR playbooks, cutting the time from strategy to execution.
Data Enrichment & Research	AI tools can enrich contact and account records with public information, synthesize research on target accounts for SDR pre-call prep, and identify org-chart relationships.
Workflow Automation	AI-powered automation platforms (Zapier, Make, Clay) can route leads, update CRM records, trigger personalized outreach, and surface alerts with minimal manual configuration.

Description: Six concrete, real use cases where generative AI has genuine, immediate value today – email drafting, content personalization at scale, campaign brief generation, and others.

How to use it: Use as a starting checklist when a team asks “what should we actually use AI for” and needs specific answers, not a general pitch.

Reply-To Inbox Triage Automation

Reply Type	AI Detects	Automated Action
Bounce / “no longer with this company”	Out-of-office or bounce language indicating the contact has left	Flag the record, tag appropriately in the CRM, unsubscribe automatically
“Please stop emailing me”	Opt-out sentiment, regardless of exact phrasing	Unsubscribe immediately, no human step required
“I’d like to book a meeting”	Genuine buying intent or meeting request	Push into a dedicated campaign, update the record, notify the assigned rep in real time
Ambiguous / unclear	Sentiment the model isn’t confident about	Route to a human for review, rather than guessing

Description: Maps common reply types (bounces, opt-outs, meeting requests) to what an AI agent should detect and the automated action it should take.

How to use it: Use as a direct build spec for setting up AI-assisted inbox triage on your own reply-to address.

Generative AI Governance

Governance Area	Policy	Owner	Review Cadence
Data Input Policy	Prohibit input of PII, customer data, or proprietary information into public LLMs without explicit legal approval	Legal / MarkOps	Annual or on tool change
Content Review Requirement	All AI-generated content must be reviewed by a human before deployment; mandatory for outbound email, paid ads, and public-facing content	Campaign Owner	Per campaign
Attribution of AI Use	Internal documentation must note where AI was used to produce assets	MarkOps	Per project
Tool Approval Process	All new AI tools must be approved by IT/Security before use with customer or prospect data	IT / MarkOps	Per tool adoption
Vendor AI Use Disclosure	MAP, CRM, and ABM vendors using AI in their products must disclose how customer data is used for model training	Legal / Procurement	Annual
GDPR / Privacy Compliance	AI-generated personalization must respect consent settings; no AI use of data where consent has not been obtained	MarkOps + Legal	Ongoing

Description: Real governance policies covering data input, content review, and attribution of AI use, with a named owner and review cadence for each.

How to use it: Use as a starting policy draft to bring to Legal or leadership when formalizing your org's AI usage rules.
