2025 Strategy Brief

EQ Creator **Eunice Quezon** ✳ Created **Apr 02, 2025, 21:30** 🕐 Last updated **May 21, 2025, 12:49**

Note: Target numbers and launch dates in red are placeholders and will be replaced by executive team-approved figures based on predictive and prescriptive insights, budget and resource constraints.

AI & Automation Strategy & Execution Pitch Deck

Company Goal

Achieve a +250 net accredited business (AB) growth by year-end 2025, targeting +1,250 by 2026 through AI-driven automation, predictive analytics, and enhanced consumer trust solutions.

Overview

PROBLEM STATEMENT: Why BBB Needs an AI & Automation Strategy

Better Business Bureau (BBB) faces increasing challenges in scalability, fraud detection, and consumer trust management, and brand relevance due to:

- Rising Business & Consumer Demands: Slow manual accreditation and dispute resolution.
- Increased Fraud & Misinformation: Scams, fake reviews, and fraudulent businesses require real-time risk assessment.
- Inefficient Processes: Labor-intensive workflows limit scalability and efficiency.
- Lack of Real-Time Insights: Businesses and consumers need AI-powered trust indicators.
- Evolving Consumer Trust Preferences: Younger consumers rely more on peer-generated reviews.
- Shifting Digital Trust Expectations: Digital-first platforms have reshaped transparency and engagement with AI.

SOLUTION: BBB must adopt AI-driven automation, predictive analytics, and intelligent customer engagement to enhance efficiency, trust, and brand credibility at scale while maintaining its core mission of consumer protection and business transparency.

Strategic Objectives & OKRs

OBJECTIVE 1: AI-Powered Business Operations & CRM Unification

KR#	Key Result	Target Launch
1.1	Successfully migrate 100% of Sales, Marketing, Accreditation, and Payment operations to HubSpot and BAW.	Q1 2025
1.2	Reduce manual workflows by 60% across Sales, Marketing, Accreditation, and Payments through AI-driven automation.	Q2 2025
1.3	Increase CRM adoption rate to 90% across teams, ensuring cross-team collaboration.	Q1 2025
1.4	Improve sales and marketing efficiency by 30% using AI-powered lead tracking, analytics, and automation.	Q2 2025

IN#	Initiative	Description	Aligned OKRs
1.A	**Sales, Marketing, & Accreditation Operations Migration to HubSpot & BAW**	Transition from legacy systems, integrate AI-driven CRM automation, and streamline sales and accreditation workflows.	1.1, 1.2
1.B	**AI-Powered Lead & Customer Engagement Automation**	Use HubSpot's AI-driven automation for lead tracking, segmentation, and personalized engagement to improve sales performance.	1.4
1.C	**Automate Accreditation Processing & Compliance Tracking in HubSpot & BAW**	Integrate AI-driven workflow automation for accreditation, including verification, compliance tracking, and approval workflows.	1.1, 1.2
1.D	**HubSpot Payments Processing & AI Billing Automation**	Replace legacy payment systems with HubSpot's AI-powered invoicing, reconciliation, and subscription management tools.	1.1, 1.2
1.E	**Data Consolidation & CRM Analytics for Business Intelligence**	Leverage HubSpot's AI analytics to unify reporting across Sales, Marketing, and Accreditation, enabling real-time business intelligence.	1.3
1.F	**AI-Powered Marketing Content Agent & Self-Service Hub**	Develop a self-service content creation experience in HubSpot with **AI-suggested email templates, communication-based content recommendations, and an embedded content assistant.**	1.2, 1.4
1.G	**Customer Research & Insights Dashboard**	Consolidate customer insights (transcripts, surveys, forms, behavior data) into a **central AI-powered dashboard** with visualization (e.g., traffic light health check) powered by HubSpot and integrated tools.	1.3
1.H	**AI-Powered Sales Enablement & Coaching Tools**	Deploy an AI Sales Coaching Agent, scenario-based role-playing tool, and knowledge-sharing hub. Integrate content tagging (HubSpot, Google Tag Manager, Adobe Launch) and e-learning insights.	1.2, 1.4
1.I	**AI Concierge Agent**	Design and pilot a **customer-facing AI Concierge Agent** (beyond standard bots) to interact and guide users intelligently across BBB services.	1.4

OBJECTIVE 2: AI-Driven Business Process Improvements

KR#	Key Result	Target Launch
2.1	Automate 50% of business accreditation workflows via AI-driven automation & HubSpot integration.	Q2 2025
2.2	Reduce fraud detection time by 50% using AI-driven risk analysis.	Q3 2025
2.3	Improve operational efficiency by 60% using AI-powered automation, including AI callers, robotic process automation (RPA), and intelligent workflows.	Q2 2025
2.4	Migrate 100% of payment processing to HubSpot, eliminating redundant workflows.	Q2 2025

IN#	Initiative	Description	Aligned OKRs
2.A	AI Accreditation Automation & Workflow Optimization	Implement AI-driven process automation for business accreditation, integrating HubSpot and BAW workflows and AI-powered document processing.	2.1
2.B	Machine Learning Fraud Detection & Risk Analysis	Utilize advanced ML models and AI-based risk assessment tools integrated with HubSpot for fraud detection.	2.2
2.C	AI-Powered Intelligent Process Automation (IPA)	Post-migration, deploy AI-driven robotic process automation (RPA), AI Callers, and intelligent virtual agents (IVAs) for customer interactions, workflow execution, and back-office process optimization. Integrate with HubSpot where applicable.	2.3
2.D	HubSpot Payments Processing & Billing Automation	Replace legacy payment systems with AI-enhanced payments automation via HubSpot, ensuring seamless transactions, invoicing, and reconciliation.	2.4

OBJECTIVE 3: AI-Enhanced Sales & Business Development Infrastructure

KR#	Key Result	Target Launch
3.1	Increase lead conversion rate by 35% through AI-enhanced sales strategies.	Q2 2025
3.2	Reduce sales cycle time by 25% through AI-driven lead scoring and automation.	Q2 2025
3.3	Improve customer retention by 20% through AI-powered engagement strategies.	Q2 2025
3.4	Recover 50% of previously disqualified businesses through revamped business rules & AI-driven re-engagement.	Q2 2025
3.5	Improve accreditation pipeline efficiency by 40% using AI-generated insights & automation.	Q2 2025

IN#	Initiative	Description	Aligned OKRs
3.A	**AI-Powered Sales Pipeline & Lead Scoring Automation**	Leverage AI-driven CRM automation for lead prioritization, pipeline forecasting, and customer engagement.	3.1, 3.2
3.B	**Automated Sales Outreach & AI Call Optimization**	Use AI-driven email automation, chatbots, and AI callers for improved engagement and follow-ups.	3.2, 3.3
3.C	**Implement AI-Driven Lead Scoring**	Use AI & predictive analytics to assess lead quality & prioritize high-conversion targets.	3.1, 3.2, 3.3
3.D	**Implement AI-powered analytics & sales performance enablement**	Use AI to track customer interactions and predict churn, ensuring proactive retention strategies. Includes tools like MindTickle to support sales coaching, rep performance, and predictive analytics for enablement.	3.3
3.E	**Revamp Business Rules for Accreditation Eligibility**	Adjust policies & rules to re-engage businesses previously marked as unqualified.	3.1, 3.4
3.F	**Automate Outreach for Non-Accredited Businesses**	Deploy AI-powered email campaigns & chatbots to re-engage lost leads.	3.4

OBJECTIVE 4: Customer Experience & Feedback Loop Optimization

KR#	Key Result	Target Launch
4.1	Increase customer satisfaction by 30% using AI-driven insights.	Q3 2025
4.2	Reduce customer response time by case type category (inquiry, disputes, cancellations, etc.) by 25% through AI Automation.	Q3 2025
4.3	Improve real-time customer engagement & feedback analysis by 80%.	Q3 2025
4.4	Elevate Customer Experience & Feedback Loop Optimization increasing customer satisfaction by 60%.	Q3 2025
4.5	Increase service activation and usage among accredited businesses by 40%.	Q2 2025

IN#	Initiative	Description	Aligned OKRs
4.A	**Predictive Analytics for Customer Behavior & Personalization**	Provide instant personalized recommendations, resolutions through AI-driven predictive and prescriptive analytics and insights.	4.1
4.B	**AI Chatbots & Virtual Assistants for 24/7 Support**	Provide instant responses, case triaging, and automated dispute resolution by automating classification and prioritization of customer inquiries.	4.2
4.C	**AI-Driven Sentiment Analysis & Feedback Loops (The AI Brain)**	Enable real-time sentiment detection and dynamic feedback loop optimization using NLP and ML models. This initiative powers intelligent reactions across customer journeys by analyzing tone, intent, and satisfaction indicators in real time.	4.3
4.D	**AI-Powered Customer Survey Insights & Action Loop**	Design and deploy AI-powered survey tools (e.g., InMoment) to collect, analyze, and summarize customer feedback across channels. Integrate survey insights into workflows to close the feedback loop and enable rapid response and experience improvement.	4.4
4.E	**Customer Interaction Logging & Sentiment Intelligence (The AI Ears)**	Centralize the collection of customer service interactions---calls, chats, and emails---to feed into AI-driven insights. This initiative enables full visibility into customer sentiment and behavior, supporting proactive experience improvements.	4.4
4.F	**BBB Product & Service Value Delivery Enablement**	Build internal systems and customer-facing touchpoints that ensure BBB-accredited businesses realize the full value of their membership and services. This includes improving benefit onboarding, usage tracking, trust badge activation, and proactive nudges for underutilized services.	4.4, 4.5

OBJECTIVE 5: AI-Powered Brand Delivery & Marketing Optimization

KR#	Key Result	Target Launch
5.1	Increase brand engagement rate by 20% through AI-powered marketing campaigns.	Q2 2025
5.2	Enhance targeted campaign conversion rates by 25% using AI-driven predictive analytics.	Q3 2025
5.3	Expand audience reach by 30% via AI-driven influencer partnerships and personalized digital engagement strategies.	Q3 2025
5.4	Reduce content production time by 40% with AI-powered content generation.	Q3 2025

IN#	Initiative	Description	Aligned OKRs
5.A	**AI-Powered Content Generation for Hyper-Personalized Ads and Campaigns**	Utilize AI to create dynamic, hyper-personalized, real-time, AI-generated marketing content tailored to audience behavior.	5.1
5.B	**Predictive Trend Forecasting & Audience Segmentation**	Use AI to anticipate trends and refine audience targeting.	5.2
5.C	**AI-Powered Dynamic Ad Targeting & Optimization**	Enhance ad performance with real-time AI-driven targeting and bid adjustments.	5.2
5.D	**AI-Driven Influencer Partnerships & Social Media Monitoring**	Automate influencer collaborations and monitor brand sentiment using AI.	5.3
5.E	**AI-Driven Content Automation & Optimization**	Leverage AI-powered tools to streamline content ideation, creation, and distribution, reducing manual effort while ensuring consistency and quality.	5.4

OBJECTIVE 6: AI-Driven Media, Content & Engagement Optimization

KR#	Key Result	Target Launch
6.1	Improve AI-driven content performance prediction accuracy by 90%.	Q3 2025
6.2	Reduce low-performing content by 30% using AI insights before publishing.	Q3 2025
6.3	Increase content engagement by 25% through AI-driven real-time optimization.	Q3 2025
6.4	Achieve 90% accuracy in AI-powered sentiment analysis for customer interactions.	Q3 2025
6.5	Automate 80% of media placement using AI-powered dynamic ad and content distribution.	Q3 2025

IN#	Initiative	Description	Aligned OKRs
6.A	**AI-Powered Content Performance Analysis & Engagement Predictions**	Use AI to predict content success and optimize engagement strategies before deployment.	6.1, 6.2
6.B	**AI-Driven Content Testing & Variant Selection**	Automate A/B testing and dynamically optimize content versions using AI to capture engagement insights, or pre-screen and refine content before publishing.	6.2, 6.3
6.C	**AI Sentiment Analysis & Consumer Behavior Tracking**	Analyze customer sentiment and behavior in real time to refine messaging.	6.4
6.D	**AI-Optimized Media Distribution & Personalization**	Use AI to personalize content delivery across digital channels for maximum impact.	6.5
6.E	**AI-Powered Content Recommendation & Dynamic Publishing**	Implement AI-driven content recommendations to maximize relevance for different audience segments and dynamically adjust publishing schedules.	6.3

OBJECTIVE 7: Optimize Data Infrastructure for AI & LLM Automation

KR#	Key Result	Target Launch
7.1	Improve AI processing efficiency by 50% through optimized data pipelines.	Q2 2025
7.2	Reduce data retrieval latency for LLM models to under 10ms.	Q2 2025
7.3	Achieve 99.9% uptime for AI-powered data operations.	Q2 2025

IN#	Initiative	Description	Aligned OKRs
7.A	**Restructure Business Data for AI & LLM Readiness**	Standardize, clean, and reformat data to ensure AI and LLM models have structured, high-quality datasets. Implement schema unification and data normalization workflows to improve accessibility.	7.1
7.B	**Integrate Data Pipelines for Automated Processing**	Develop AI-driven ETL (Extract, Transform, Load) pipelines for automated data ingestion, transformation, and continuous data flow. Use real-time processing tools (e.g., Apache Kafka, Airflow, or Databricks) to handle large-scale AI workloads efficiently.	7.1, 7.2
7.C	**Deploy Scalable Storage & Retrieval Systems**	Implement cloud-based object storage (IBM Cloud Object Storage, AWS S3, Google Cloud Storage, Azure Blob) and vector databases (FAISS, Pinecone, Weaviate) to optimize AI data retrieval speeds. Ensure low-latency access with caching mechanisms (Redis, Memcached).	7.2, 7.3
7.D	**Optimize Data Indexing & Query Performance for LLMs**	Improve AI model response times by implementing intelligent indexing strategies, precomputed embeddings, and federated search techniques. Optimize query execution plans to reduce latency.	7.2
7.E	**Implement AI-Driven Data Governance & Security Frameworks**	Establish AI-powered data monitoring and anomaly detection to ensure compliance with security and governance policies. Use automated risk assessments and self-healing data pipelines to maintain 99.9% uptime.	7.3

OBJECTIVE 8: AI & Data Integrity Governance

KR#	Key Result	Target Launch
8.1	Ensure 95% data accuracy and compliance across AI-driven operations.	Q3 2025
8.2	Reduce AI bias and misinformation risks by 40%.	Q3 2025
8.3	Detect 95% of compliance violations through real-time AI ethics and risk monitoring frameworks.	Q3 2025

IN#	Initiative	Description	Aligned OKRs
8.A	**AI-Powered Data Integrity & Compliance Monitoring**	Implement AI-driven tools to ensure high data accuracy and regulatory adherence using automated validation and monitoring.	8.1
8.B	**AI-Driven Data Quality Checks & Validation**	Automate real-time data audits and anomaly detection for data reliability.	8.2
8.C	**AI Bias Detection & Ethical AI Implementation**	Deploy AI models using ethical AI frameworks and bias detection models to mitigate bias, enhance transparency, and enforce ethical AI governance.	8.3

OBJECTIVE 9: AI Performance Optimization & Continuous Improvement

KR#	Key Result	Target Launch
9.1	Reduce AI model drift by 40% through continuous monitoring and retraining.	Q3 2025
9.2	Improve AI automation efficiency by 30% through quarterly system performance audits.	Q3 2025
9.3	Adjust and optimize AI dynamic decision-making accuracy by 95% through a real-time AI feedback loop.	Q3 2025

IN#	Initiative	Description	Aligned OKRs
9.A	**AI Model Monitoring & Drift Prevention Framework**	Deploy AI-powered systems to detect and mitigate model drift in real time, through continuous monitoring and anomaly detection.	9.1
9.B	**AI Model Retraining & Performance Audits**	Automate AI model retraining and conduct periodic audits to enhance accuracy and efficiency.	9.2
9.C	**AI Performance Dashboards for Real-Time Optimization**	Implement intelligent dashboards for continuous AI system monitoring and proactive adjustments.	9.3
9.D	**AI Decision Feedback Loops**	Develop AI-driven feedback mechanisms to refine decision-making processes and improve learning efficiency.	9.3

OBJECTIVE 10: AI-Powered Internal Workforce Optimization

KR#	Key Result	Target Launch
10.1	Reduce HR and support ticket response time by 60% using AI-powered self-service.	Q2 2025
10.2		Q2 2025
10.3		Q2 2025

| IN#	Initiative	Description	Aligned OKRs
10.A	AI HR Concierge & Internal Self-Service Agent	Deploy a secure, AI-powered HR support agent that can assist employees with questions about PTO, benefits, policies, onboarding, and forms. Integrated with SharePoint and HR systems, it provides real-time answers, automates Tier 1 requests, and escalates complex ones to HR.	10.1, 10.2, 10.3

Business Groups & Execution Teams RACI

| OBJECTIVE	RESPONSIBLE	ACCOUNTABLE	CONSULTED	INFORMED
1 - AI-Powered Business Operations & CRM Unification	Sherlock (3P HubSpot), Salient (3P IBM BAW), BI Team	BI Team	Business Development Sales, Marketing, Account Management Team, Standards Team	Leadership Team
2 - AI-Driven Business Process Improvements	Sherlock (3P HubSpot), Salient (3P IBM BAW), BI Team	BI Team	Account Management and Operations	Leadership Team
3 - AI-Enhanced Sales & Business Development Infrastructure	Sherlock (3P HubSpot), Salient (3P IBM BAW), BI Team	BI Team	Business Development and Sales Operations	Leadership Team
4 - Customer-Centric AI Enhancements	Sherlock (3P HubSpot), Salient (3P IBM BAW), BI Team	BI Team	Business Development and Customer Success	Leadership Team
5 - AI-Powered Brand Delivery & Marketing Optimization	Sherlock (3P HubSpot), Salient (3P IBM BAW), BI Team	BI Team	Marketing Solutions/Brand Marketing	Leadership Team
6 - AI-Driven Media, Content & Engagement Optimization	Sherlock (3P HubSpot), Salient (3P IBM BAW), BI Team	BI Team	Media & Innovation	Leadership Team
7 - Optimize Data Infrastructure for AI & LLM Automation	IT Team, Sherlock (3P HubSpot), Salient (3P IBM BAW), BI Team	BI Team	IT Team, BI Team	Leadership Team
8 - AI & Data Integrity Governance	Salient? (3P for data lake/Snowflake and a data warehouse), BI Team	BI Team	Business Intelligence & IT	Leadership Team
9 - AI Performance Optimization & Continuous Improvement	BI Team, IT	BI Team	Business Intelligence & IT	Leadership Team

Roadmap and Implementation Timeline

Timeline High-Level

sourced from AI & Automation Strategy & Execution Pitch Deck
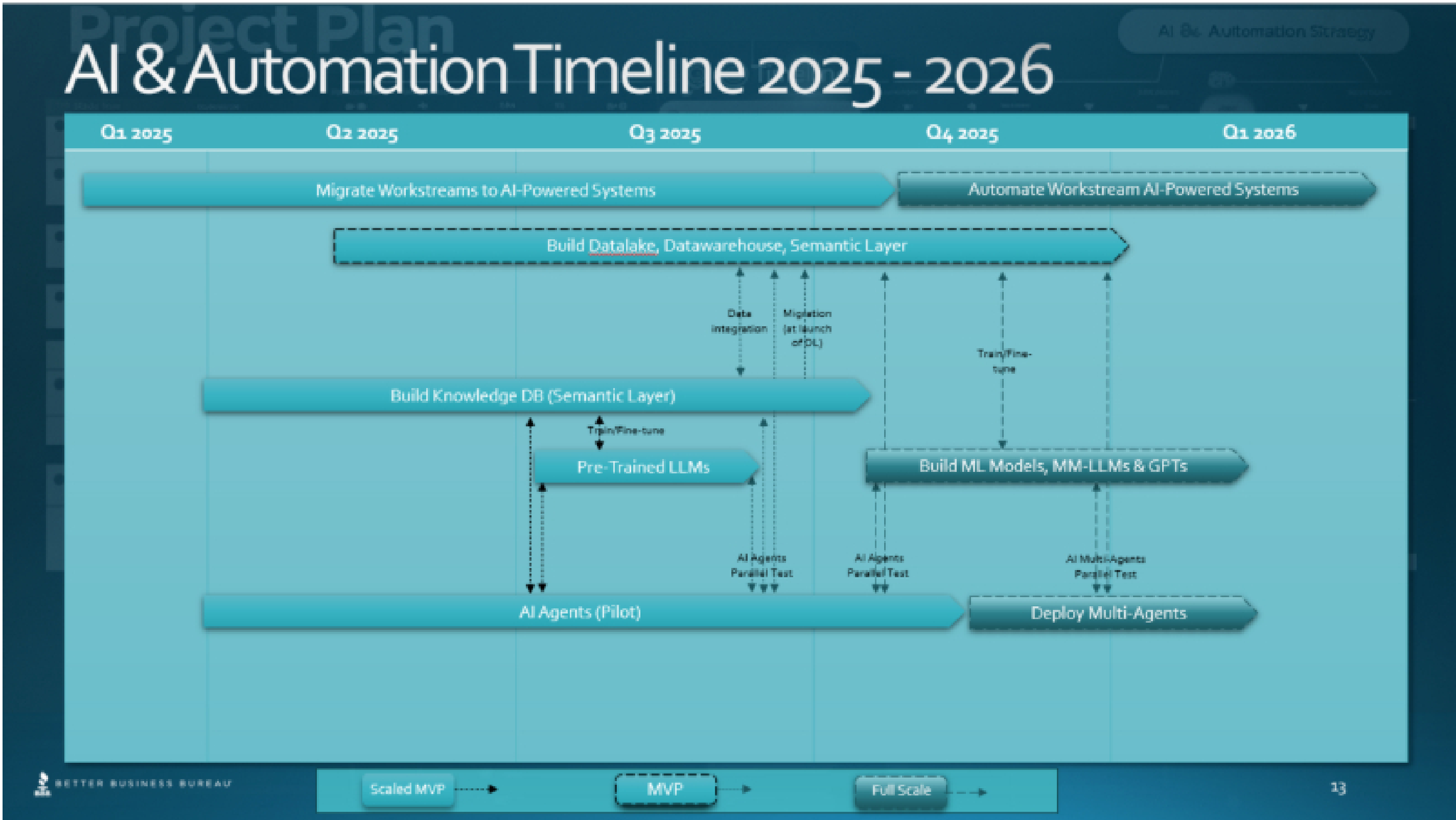
Timeline Detailed

sourced from AI & Automation Strategy & Execution Pitch Deck
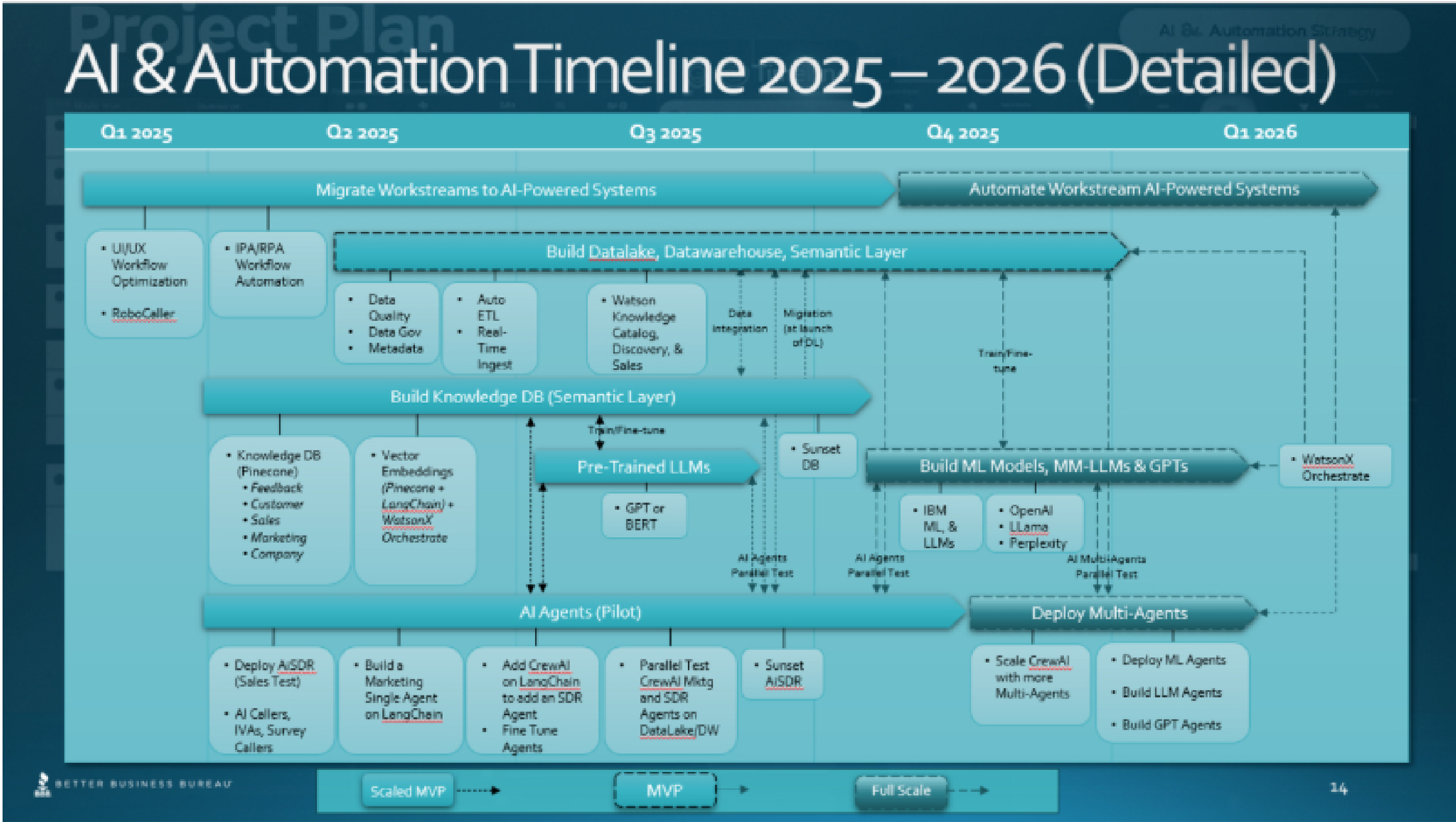
Timeline sourced from Strategy, Execution and Story Boards

Timeline

Widget is not supported to export

Expected Outcomes and Success Metrics

- [ ] 20% increase in net AB growth
- [ ] 30% Faster Business Accreditation Process
- [ ] 20% Increase in Customer Satisfaction
- [ ] 15% Reduction in Fraudulent and Biased Business Listings
- [ ] 40% Overall Higher Operational Efficiency and Transparency
- [ ] 30% Operational Cost Reduction
- [ ] 10% positive ROI in first year to 20% in 2-3 years after project launch