ACROSS THE TABLE

BUSINESS CONSULTING

INDUSTRY STACK 14 · MARKETING AGENCY

The Marketing Agency Stack

Nine systems for the industry AI changed first — and the uncomfortable question that comes with it.

Knowledge Article I14

AI Stack Series · acrossthetable.biz

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WHO THIS IS FOR

You run a marketing, creative, social or content agency. You sell work that AI is now extremely good at producing a first version of. That is either the best thing that ever happened to your margins or an existential problem, depending on what you actually sell.

This guide is for the agency owner who needs to decide which it is, and build the stack accordingly.

It is blunt in places. This industry does not benefit from being told everything is fine.

START WITH THE WORK, NOT WITH THE APPS

These are not twenty lists of AI apps. Each stack starts with the jobs a particular business performs, then matches AI and conventional software to those jobs. Treat it as a menu to evaluate, not a shopping list.

For this kind of business the work runs in one line, start to finish:

> **THE PATH THE WORK TAKES**
> Lead → Strategy → Content → Campaign → Reporting

Broken into the steps a customer actually moves through:

- Client
- Strategy
- Content
- Creative
- Approval
- Distribution
- Analytics
- Optimization

Read that line left to right. A client arrives, you set strategy, you make content, you distribute it, you report on it, and you do it again better.

Here is the uncomfortable part. Content production — the middle of that line — is the step AI compresses most. If content production is what you bill for, your pricing is under pressure whether or not you adopt any of these tools. If strategy and results are what you bill for, AI makes you faster at the part you were giving away free.

THE STACK, PIECE BY PIECE

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Every tool below is matched to one of those steps. You do not need all of them, and you should not buy all of them at once. Read the “What it is” column first and find the step where your business is losing the most time or money.

Tool	The step it covers	What it is	Price
HubSpot	Clients and leads	Customer records, marketing, sales and service in one platform.	Free CRM; paid hubs per month.
Jasper	Brand content	Brand-trained marketing copy across campaigns and channels.	Paid per seat/month.
ChatGPT / Claude	Strategy	OpenAI’s general assistant — writing, analysis, research and, with Agent mode, multi-step work.	Free tier; paid plans per user/month.
Canva	Visuals	Design everything else — decks, social posts, flyers, simple video — with AI help built in.	Free tier; Pro per user/month.
HeyGen	AI video	AI presenters and avatars that speak your script in many languages.	Paid per month by video minutes.
Descript	Editing	Edit recordings by editing the transcript.	Free tier; paid per user/month.
Asana / ClickUp	Projects	Projects, tasks and workloads with AI summaries.	Free tier; paid per user/month.
Buffer / Hootsuite	Publishing	Schedule and publish social posts across channels.	Free tier; per channel/month. / Per user/month.
Looker Studio	Reporting	Free Google dashboards over your marketing and business data.	Free; paid Pro tier.

Where two names share a row with a slash between them, they do the same job and you pick one, not both. The description shows the first of the two.

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This is the longest stack on the list, and no agency should run all of it at once. Pick the two rows that match the work you actually sell most of.

What to watch out for in each one

None of these are reasons not to buy. They are the things owners tell us they wish they had known first.

- HubSpot — Costs step up sharply by tier and contact count.
- Jasper — Needs brand training to beat a general assistant.
- ChatGPT — It sounds confident when it’s wrong. Check anything that touches money, law or a customer.
- Claude — Same rule as any assistant: verify facts and never paste data you wouldn’t email.
- Canva — Easy to drift off-brand. Lock a brand kit.
- HeyGen — Disclose synthetic presenters. Get consent for any real likeness.
- Descript — Big files, real learning curve.
- Asana — Structure only works if everyone updates it.
- ClickUp — Configuration can become the project.
- Buffer — Publishing, not strategy.
- Hootsuite — Priced above what a solo operator needs.
- Looker Studio — Slows down on big data sources.

WHERE AI ACTUALLY FITS IN THIS BUSINESS

Almost an AI content factory — drafting, repurposing, variant testing, reporting narratives and campaign analysis.

In plain terms, that means:

- Producing the first draft of a campaign’s copy across every channel from one brief, then spending your hours on the edit.
- Turning a single long asset — a webinar, an interview, a report — into the posts, clips, emails and articles that come from it.
- Generating genuine variants for testing instead of two versions that differ by a word.
- Writing the narrative on top of a monthly report so the client understands what happened, not just what the numbers were.
- Doing the competitive and audience research that used to be a junior’s week.

Two rules that keep agencies out of trouble. First, disclose. Clients increasingly ask what is AI-produced, and finding out later is much worse than being told. Second, originality and

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rights still apply — AI output can resemble things, and a trademark or copyright complaint lands on you, not the vendor.

WHAT TO SET UP FIRST

Do these in order. Finish one before you start the next. Most owners who try to do all of it in one month end up using none of it.

1. **Decide what you sell before you buy anything** Hours, deliverables or results. Your answer determines which of these tools make you money and which quietly reduce your billings.
2. **Fix project visibility** Agencies die of capacity problems more than demand problems. One system showing who is working on what and when it is due.
3. **Build a brand-voice system for content** Content tools are only useful if the output sounds like the client. Set up brand guidelines inside the tool once rather than editing tone forever.
4. **Automate reporting** The monthly report is the most hated recurring task in agency life and the most automatable. Dashboards pull the numbers; AI writes the narrative; you add the judgment.
5. **Then add production tools** Video, audio and scheduling tools are leverage once the first four are working.

WHAT IT COSTS TO START

Almost everything in this stack is per user per month, which means an agency's tool cost scales directly with headcount — at exactly the moment AI is reducing the headcount a given volume of work requires. Watch that: many agencies are paying for seats that are no longer the constraint.

Reporting dashboards can be free. If you are paying for reporting, check whether you need to.

The genuine question is not cost, it is pricing. If AI halves your production hours and you bill by the hour, you have just cut your own revenue. Deliverable or retainer pricing converts the efficiency into margin instead of a discount you did not mean to give.

The price column in the table above tells you how each one charges — per user, per location, per contact, or a percentage of every sale — not what you will pay. That is deliberate. The charging model is what decides whether a tool stays affordable as you grow, and it is the part that does not change every quarter. Get the current dollar figure from the vendor's own pricing page before you budget.

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THE RULES UNDERNEATH ALL OF IT

Legal · Privacy · Data protection · Security · Compliance · Records · Audit · Risk · Human oversight — underneath every one of the twenty stacks, not an afterthought.

Disclose AI use to clients. Put it in the contract. This is becoming standard and the agencies that got ahead of it look professional rather than caught out.

Rights and originality are yours to manage. Check AI-generated visuals and copy for resemblance to existing work before it goes out under a client's name.

Client data, especially customer lists and performance data, belongs in approved tools. Know whether your vendors train on input.

Advertising claims are regulated. AI will write a confident superlative that your client cannot substantiate. Someone reviews every claim.

If you work with regulated clients — health, finance, legal — their compliance rules apply to your output.

MISTAKES THAT COST THE MOST

- Billing hours while using tools that eliminate hours.
- Letting AI content go out without a brand-voice layer, so every client sounds like the same generic newsletter.
- Not disclosing AI use and having a client find out from the work.
- Buying nine tools because they are all interesting, and mastering none.
- Competing on price against AI-assisted shops instead of competing on judgment and results.

THE CEO DECISION

- What are clients actually paying for: the production, or the thinking?
- If your production time halved tomorrow, would your revenue rise or fall? That answer is your strategy.
- Does your contract address AI use?
- How many seats are you paying for that the work no longer requires?
- What can your agency do that a competent person with a good AI tool cannot?

YOUR QUICK REVIEW

☐ I know whether I sell hours, deliverables or results.

☐ AI use is disclosed in client contracts.

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- ☐ Content tools are configured with each client’s brand voice.
- ☐ Monthly reporting is automated end to end.
- ☐ Every claim in client-facing work is reviewed by a person.

ADDITIONAL RESOURCES

Tool	Where to find it	What it is for
HubSpot	www.hubspot.com	Small businesses that want one system of record.
Jasper	www.jasper.ai	Marketing teams keeping one voice across a lot of output.
ChatGPT / Claude	chatgpt.com / claude.ai	Your default thinking partner when you want one tool that does most jobs well.
Canva	www.canva.com	Small teams with no designer who still need consistent-looking work.
HeyGen	www.heygen.com	Training, onboarding and updates you don’t want to film every time.
Descript	www.descript.com	Podcasts, webinar cutdowns, cleaning up filler words.
Asana / ClickUp	asana.com / clickup.com	Teams who need visible ownership and dates.
Buffer / Hootsuite	buffer.com / www.hootsuite.com	Keeping a consistent posting rhythm.
Looker Studio	lookerstudio.google.com	Client reporting without a BI budget.
Across the Table AI Assessment	acrossthetable.biz/#assessment	Fifteen minutes. Tells you which job to start with before you buy anything.
The Scaling Edge	acrossthetablebiz.substack.com	Weekly newsletter for owners without a business background.

Go deeper on the pieces

Each of these is a full guide comparing the three tools that do that job:

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- Ask and reason — acrossthetable.biz/knowledge-articles/ask-and-reason/ (covers ChatGPT, Claude)
- Put you on video — acrossthetable.biz/knowledge-articles/put-you-on-video/ (covers HeyGen, Descript)
- Run the work — acrossthetable.biz/knowledge-articles/run-the-work/ (covers ClickUp, Asana)
- Make the deck — acrossthetable.biz/knowledge-articles/make-the-deck/ (covers Canva)
- Write the copy — acrossthetable.biz/knowledge-articles/write-the-copy/ (covers Jasper)

CONTINUE LEARNING

The Across the Table AI Assessment takes fifteen minutes and starts from what the agency actually does.

The guides above compare the leading tools for each job side by side.

READ AND CONNECT WITH ACROSS THE TABLE

Across the Table website: https://acrossthetable.biz

The Scaling Edge newsletter: https://acrossthetablebiz.substack.com

YouTube: https://www.youtube.com/@AcrossTheTableConnie

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