

Use AI Without Giving Up the Experience, Voice, and Judgment Customers Trust

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What Customers Count on You For

Your AI strategy begins with the relationship you have already earned.

A dependable experience

Customers receive accurate information and can reach someone who helps them.

A recognizable voice

Your words reflect the way you actually serve people.

Experienced judgment

Someone recognizes exceptions, checks promises, and takes responsibility for the result.

Consider: What do customers trust your business to get right?

One Workflow You Can Improve

Today's example is using AI to help answer a customer inquiry.

The opportunity is to reduce repetitive drafting while keeping the answer accurate, helpful, and consistent with your business.

By the end of this session, you will be able to:

- Choose one recurring task for AI assistance.
- Identify the current information AI can use.
- Set boundaries around information and decisions.
- Name the person who reviews the result.
- Decide how to measure improvement.

The practice scenarios in this session are fictional business examples.

Trust Belongs Inside the Process

Before AI works

Choose an appropriate tool and current, approved source information. Decide what information the task actually needs.

Before the customer sees the result

Check the facts, tone, and promises the response makes.

When the situation changes

Give a person responsibility for exceptions, corrections, and updates.

A statement about using AI cannot replace a working review process.

Where AI Already Touches Your Work

Include the work you delegate and the software you already use.

People

You, employees, a virtual assistant, a contractor, or a marketing provider may use AI while working for your business.

Tasks

AI may help draft emails, summarize notes, prepare posts, or answer questions.

Features inside existing software

AI may appear inside email, meeting, website, or customer-service software.

Ask: **Who uses which tool, for what task, and with what information?**



Weak Links in Your Source Information

An old service sheet

AI drafts a reply about an offer you no longer sell.

A missing policy

AI fills in a delivery promise that no one approved.

Conflicting versions

Your website and your assistant's reference document give different answers.

Keep a dated, approved source and name the person who updates it.

Current information gives AI a better starting point. Human review still matters.



Consistent Information Supports Visibility

Compare the answers people find with the answers your team gives.

Public information

Review your website, relevant business listings, service pages, and FAQs.

Customer conversations

Check whether inquiry replies and sales materials describe the same services, policies, and next steps.

A practical use of AI

Ask AI to flag differences in approved copies of these materials. A person verifies the differences and makes the corrections.

For example, your website may describe weekday service while an old FAQ still promises weekends.

Clear information helps people understand your business. It does not guarantee search rankings or AI citations.

AI Features and Business Infrastructure

An AI feature performs a task.

Examples include drafting a reply, summarizing a document, or suggesting social posts.

Your supporting infrastructure makes that feature usable in your business.

It includes:

- Approved tools and appropriate access.
- Current business information.
- Instructions for how the work happens.
- Review and approval responsibilities.
- A process for exceptions and corrections.

For a small business, the starting setup can be a shared workflow guide and a defined review process.

A Workable Small-Business Setup

Tool and access

Name the approved tool and who can use it.
Give people appropriate individual access.

Current source material

Use an approved service sheet, FAQ, and relevant policy with a review date.

Ownership and review

Name who checks drafts, handles exceptions, and updates the source.

A written boundary

State what AI may prepare and what it cannot send or decide alone.

An owner and an assistant can use this structure. In a solo business, the owner may fill every role.

Data Boundaries Before Drafting

Use only what the task needs.

A general service answer may need the question and an approved FAQ. It may not need the customer's full record.

Use fictional information for practice.

Leave out account numbers, payment information, passwords, and private records.

Check the actual tool and account.

Review access, retention, and data-use terms before using business information.

A familiar brand name or paid subscription alone does not establish permission to upload sensitive data.



Human Review Has a Clear Job

Check facts and commitments.

Verify services, dates, prices, availability, and policy exceptions against approved sources.

Check voice and customer experience.

Read for tone, relevance, and a useful next step.
Remove language your business would not use.

Give the reviewer authority.

The reviewer can correct, approve, or stop the response and route it to the right person.

For this starter workflow, **AI drafts and a person approves before sending.**



The Same Setup Across a Larger Team

Shared standards

Departments use the same approved policies and know which local details may differ.

Defined permissions

People access the information their role needs. Changes have an owner.

An escalation route

Exceptions go to a named role, with a backup when that person is unavailable.

A record of use

Track the workflow, source version, reviewer, and recurring problems.

The core decisions stay the same as the number of people grows.

Practice Scenario: A Customer Inquiry

Fictional business: Cedar Home Services

The customer asks:

"Can you replace my water heater this Saturday? Is the visit free?"

The current approved service sheet says:

- Appointments take place on weekdays.
- A diagnostic visit costs \$95.
- The office confirms availability.
- Replacement pricing follows an assessment.

An old flyer says:

"Free estimates and Saturday appointments."

The business has retired that offer, but the old flyer remains in its files.

A Polished Reply Can Still Be Wrong

Practice draft

"Absolutely! We can replace your water heater this Saturday, and your visit is free. We look forward to taking care of everything for you!"

The reply sounds friendly and confident.



What facts or promises need checking before this reaches the customer?

The Review Catches Three Problems

Unsupported availability

The draft promises Saturday. The current source offers weekday appointments and requires office confirmation.

Outdated pricing

The draft promises a free visit. The current diagnostic fee is \$95.

An unapproved commitment

The draft promises replacement before an assessment establishes the work needed.

The correction begins with the source information and task instructions. Then a person checks the new draft.

A Drafting Prompt With Clear Boundaries

"Draft a friendly reply using only the approved service sheet below.

Explain the \$95 diagnostic visit and weekday appointments.

Do not confirm availability or promise replacement.

If a detail is missing or conflicting, flag it for the office.

Give the customer a clear next step.

Return a draft for human review."

Add the current approved service sheet to the instruction.

This prompt supports the review process. It does not guarantee a correct answer or replace access controls.

A Helpful Reply With Accurate Limits

"Thanks for reaching out. Our diagnostic visit is \$95, and we offer weekday appointments.

Our office can check the next available time. After the assessment, we can explain any replacement options and pricing.

Would you like our office to help arrange a weekday visit?"

The reply addresses the question, explains the current service, and offers a useful next step.

Before sending, the reviewer checks the source, tone, and commitments.

When an Exception Needs Judgment

The customer replies:

"I can only do Saturday. Can you waive the fee?"

AI's role

Flag the exception and prepare a short summary for the office.

The person's role

Check available options and decide whether an exception is appropriate.

The customer's experience

Explain who will help next. Give a response timeframe only when the team can meet it.

AI has no authority to change this business's price or scheduling policy.

Who owns this decision in your business?

The Workflow After the Correction

1

Prepare

Keep the current service sheet available. Remove the retired flyer from the drafting source.

2

Draft

Use only necessary information and the instruction with clear boundaries.

3

Review and respond

A person checks facts, handles exceptions, and approves the reply.

4

Learn

Record recurring corrections. Update the source information or instructions when needed.

If incorrect promises keep recurring, pause the workflow and fix the cause.

Clear Communication About AI Use

Explain the process in language people can understand.

What AI does

Describe its actual role, such as preparing drafts or answering general questions.

What people do

Explain who checks the work or handles requests beyond AI's role.

How someone gets help

Provide a practical route to a person. Make that route easy to find.

Use wording that matches the process you actually operate.



Language Customers Can Understand

When your team reviews every reply

"AI helps us prepare draft responses. Our team checks the details before sending them."

Use this statement only when that review happens.

When customers interact with an AI assistant

"You're chatting with our AI assistant. It can help with general service questions. Contact our team for account details or an exception."

Pair this statement with a real, usable contact route.

These examples describe the customer experience. Industry-specific disclosure requirements may need a separate review.

A Clear Explanation for Partners

"We use an approved AI tool to help draft general service responses.

We use only the information needed for that task.

A team member checks the response before it goes out and handles any policy exception."

Be ready to explain:

- What information enters the tool.
- Who can access it.
- What AI is allowed to do.
- Who takes responsibility for the result.

Your explanation becomes easier when those decisions already have clear answers.

A Useful Workflow Earns Its Place

Time after review

Compare total time spent, including checking and correction, with your current process.

Quality

Track wrong facts, unsupported promises, and repeated edits.

Customer experience

Check whether the response resolves the question or creates avoidable follow-up.

Business value

Include tool costs and staff time when evaluating the benefit.

Faster drafting is useful when the full workflow improves.

A Completed Workflow Plan

Cedar Home Services: illustrative plan

Task and source

Draft general service replies using the current approved service sheet and FAQ.

Boundary and owner

No account records, booking promises, or price exceptions. The office manager reviews and sends each reply.

Success and review

Compare drafting plus review time and count corrections during a small initial pilot.

Stop condition

Pause if incorrect promises recur or information goes beyond the approved scope.



Your First Workflow Plan

Choose one recurring task. Take 90 seconds to write your first draft.

Task and improvement

AI will help with \\\\. The improvement I want is \\\\..

Source and boundaries

It can use \\\\. It must not receive or decide \\\\..

Human responsibility

\\\. will review the work. Exceptions go to \\\\..

Measure and first action

I will track \\\\. My next step is \\\\. by \\\\..

Recap

The Next Step in Your Business

One gap to close

Use the readiness checklist to choose a missing source, boundary, owner, or review step.

One small test

Try the workflow with low-risk or fictional information before widening its use.

One review date

Check what improved, what needed correction, and whether to continue, change, or pause.

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Questions About Your Workflow

What task are you considering, and where does it need human judgment?

Bring forward questions about:

- Unclear source information.
- Customer handoffs.
- Review responsibilities.
- A workflow that keeps producing corrections.

Use the recording with these slides afterward. The following reference pages provide a checklist and additional examples.

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Resources

Reference: AI Readiness Checklist

Mark each item **Yes, Not yet, or Not sure**. Choose one gap to address first.

Visibility and access

We know the tools, tasks, and people involved. Each person has appropriate individual access.

Source and data

We have current approved sources and clear rules for what information can enter each tool.

Review and customer help

We name reviewers, route exceptions, and provide a workable human contact path.

Ownership and change

Someone owns the process and reviews new features, errors, and source changes.

Reference: A Vendor Adds AI Replies

Fictional scenario

Your website provider offers automatic customer answers.

Information

What sources and customer details can the feature access? What do its terms allow?

Authority

Can it only draft, or can it send messages, book work, or offer discounts?

Control

Who tests the answers, reviews problems, and pauses the feature?

Customer help

What happens when it cannot answer or the customer requests a person?

Agree on the workflow and responsibilities before enabling the feature.

Reference: Several Teams Use AI

Fictional scenario

Marketing, sales, and service each create their own AI assistant.

The weak link

Each assistant uses a different version of the offer, price, or service policy.

The shared decision

Name an owner for approved business information. Define which local details can vary.

The operating check

Keep a list of the tools, workflows, sources, owners, and review dates.

The escalation

Assign a person to resolve conflicting answers before they reach customers.

For a small business, the same situation can involve an owner, virtual assistant, and outside provider.

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Next Steps: AI Put to Work

01

1. Identify Your First Task

Choose one low-risk, repetitive task where AI can offer immediate support. Starting small allows for focused learning and quick wins.

02

2. Define Clear Boundaries

Establish strict guidelines for what information the AI can access and what decisions must always involve human judgment. Safeguard sensitive data.

03

3. Assign Human Oversight

Designate specific individuals responsible for reviewing AI outputs, managing exceptions, and ensuring the workflow aligns with your brand standards.

04

4. Pilot, Track, and Review

Implement your new AI-assisted workflow on a small scale. Monitor its performance, gather feedback, and schedule regular reviews to refine and optimize.

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Questions

Using AI effectively requires strategic planning, not just technological adoption. Remember these key principles:

1 Plan Your Workflow

Clearly define AI's role, sources, and boundaries to maintain trust and brand voice.

2 Prioritize Human Oversight

Establish clear review processes and assign accountability for AI-generated content.

3 Test, Learn, and Adapt

Pilot new AI tools with low-risk data, track performance, and continuously refine your approach.

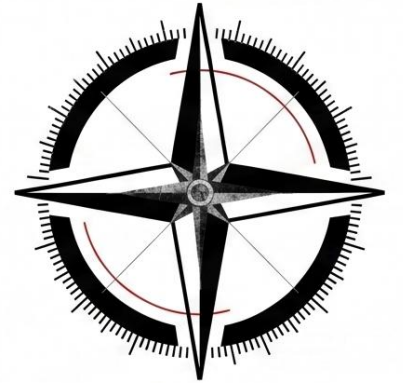
Further Learning

Review the detailed AI Readiness Checklist and additional scenario examples provided in the session materials.

For more insights and to develop your Smart Brand System™, visit SmartBrandSystem.com.

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