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BRICK CHAMBER OF COMMERCE • LUNCH & LEARN

NAVIGATING MODERN MARKETING

Real-world AI. Better judgment. Practical execution.

Abdel Khawatmi | Got Mortgages

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RULES

ONE HUMAN STANDARD

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Leave with a system—not another to-do list.

By the end, make one business problem easier to act on.

One clear question

A customer or business decision worth solving—not a vague request to “do more marketing.”

One usable workflow

Approved evidence, an AI draft, a named reviewer and a personal next step.

One visible scorecard

Your baseline, your goals and a weekly decision based on what actually happened.

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Seven rules. One human standard.

Use the rules together—not as permission to skip the review.

1. **AI is the analyst. I'm still the advisor.**
2. **Start with questions, not prompts.**
3. **Control the evidence.**
4. **Research first. Opinion last.**
5. **Explain the why, not just the what.**
6. **Use AI to prove yourself wrong.**
7. **Compress the work. Never compress the thinking.**

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RULE

1

ADVISOR

Better judgment.
Stronger relationships.
Measurable execution.

AI is the analyst. I'm still the advisor.

WHAT IT MEANS

AI can organize options and surface questions. The recommendation and accountability stay with you.

IN PRACTICE

A lender prepares scenario questions. A contractor compares scopes. Neither lets a draft replace customer discovery.

YOUR MOVE

Which decision in your business must always have a named human owner?

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RULE

2

QUESTIONS

Better judgment.
Stronger relationships.
Measurable execution.

Start with questions, not prompts.

WHAT IT MEANS

Start with the decision you need to make. Then ask what evidence would make the answer useful.

IN PRACTICE

Instead of “write ten posts,” ask “what question is preventing my ideal customer from taking the next step?”

YOUR MOVE

What is the one question your next piece of marketing should answer?

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RULE

3

EVIDENCE

Better judgment.
Stronger relationships.
Measurable execution.

Control the evidence.

WHAT IT MEANS

Give the tool an approved evidence packet—not a pile of unverified or sensitive information.

IN PRACTICE

Use a dated service sheet, authorized de-identified notes and the customer's stated question. Label what is missing.

YOUR MOVE

What source would you need to verify before you could use this answer?

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RULE

4

RESEARCH

Better judgment.
Stronger relationships.
Measurable execution.

Research first. Opinion last.

WHAT IT MEANS

Observe the conversation before deciding why it succeeded or failed. Separate behavior from interpretation.

IN PRACTICE

Review whether a clear question was asked, the customer's goal was repeated and a next step was agreed.

YOUR MOVE

What exact words support your conclusion—and what is another reasonable explanation?

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RULE

5

EXPLAIN

Better judgment.
Stronger relationships.
Measurable execution.

Explain the why, not just the what.

WHAT IT MEANS

Explain the implication for the customer's goal, the uncertainty and the next useful action.

IN PRACTICE

A business owner does not need jargon about search or AI. They need to understand what to improve and why.

YOUR MOVE

Can you explain this in 45 seconds without a promise you cannot support?

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RULE

6

CHALLENGE

Better judgment.
Stronger relationships.
Measurable execution.

Use AI to prove yourself wrong.

WHAT IT MEANS

Ask for the strongest counterargument. Test the weak assumption instead of looking for agreement.

IN PRACTICE

If a campaign gets attention but no meetings, challenge the offer, the audience, the call to action and the follow-through.

YOUR MOVE

What evidence would make you change your mind—and what low-cost test could you run?

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RULE

7

EXECUTE

Better judgment.
Stronger relationships.
Measurable execution.

Compress the work. Never compress the thinking.

WHAT IT MEANS

Shorten repetitive preparation. Keep the evidence check, the human decision and the relationship.

IN PRACTICE

Turn authorized meeting notes into draft actions; a person confirms owners, dates and what was actually agreed.

YOUR MOVE

Where will the recovered time go: more noise, or a better customer conversation?

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Build the human checkpoint into the workflow.

Six steps turn the seven rules into a repeatable operating practice.

01	02	03	04	05	06
Question	Evidence	Draft	Human review	Personal action	Measure

Before release: Who checks it? What can stop it? Who owns the next step?

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Build one workflow before you leave.

Work with a fictional example or approved, de-identified information.

2 min	QUESTION	Name the audience, problem and useful decision.
3 min	EVIDENCE	List approved facts, sources and missing information.
4 min	DRAFT	Use approved evidence to draft one useful answer.
3 min	REVIEW	Check claims, tone, source limits and ownership.
3 min	ACTION + MEASURE	Choose the personal next step and one KPI.

Definition of done: useful output + named reviewer + next step + owner + due date + measure

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Eight measures. Two different jobs.

Activity shows execution. Outcomes and reliability show whether the system deserves to continue.

Outreach completed
Completed outreach actions

Conversations completed
Two-way business exchanges

Meetings completed
Meetings actually held

Assets published
Published date + named reviewer

Net hours saved
Before − after, including review

Decision win rate
Won ÷ (Won + Lost), by decision date

Creation-cohort win rate
Current wins ÷ that creation cohort

Due-date on-time rate
On time ÷ elapsed, non-cancelled tasks

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Build → repeat → test → decide.

Keep the operating system simple enough to use when business gets busy.

Days 1-7
Build the baseline

One problem, one audience, one workflow. Set goals and complete the first weekly review.

Days 8-14
Repeat with discipline

Repeat the workflow. Audit source quality and follow-up completion. Improve one script.

Days 15-21
Test one variable

Change only one element: question, message, call to action or follow-up timing. Track the result.

Days 22-30
Keep, fix or stop

Compare outcomes and review time. Document what works, assign an owner and set the next review.

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YOUR COMMITMENT

Automate the work around the relationship. Never automate the relationship.

One action. One owner. One date. One measure.

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