

THINK FIRST

Prompt Second

How to Use AI Without Losing the Plot

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Integrate
2026



**Revolutionize your workflow
with cutting-edge solutions
designed to unlock efficiency
and drive innovation.**



We help teams simplify the busywork so they can focus on what actually matters.



**Transform customer
interactions through AI-driven
engagement orchestration.**



Reach customers with the right message at the right time, without sounding robotic.



Leverage AI-driven operational intelligence to unlock scalable transformation across the customer lifecycle.



Use customer data and AI insights to better understand what people need at each stage of their journey.



Let's Take a Poll



But First!

Some Background



How many of you have had a moment where AI impressed you... but also *unsettled* you at the same time?



THINK FIRST

Prompt Second

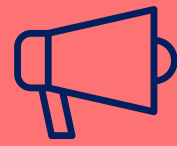


How do we stay thoughtful, strategic, and human while working faster than ever before?



CUSTOMER JOURNEY THINKING

AI works best when we understand the human behind the interaction.



👁️ Awareness Phase
How do people first notice you?



🤔 Consideration Phase
Why should they trust you?



✅ Decision Stage
What helps them act?



❤️ Retention & Loyalty
Why do they stay, return, and advocate?



Awareness



What AI is really good at during Awareness

How do people first notice you?

- Synthesizing reviews
- Clustering themes
- Identifying objections
- Spotting language patterns
- Summarizing trends
- Organizing large datasets
- Accelerating research



But there's an important distinction...

AI identifies *patterns*. Humans decide what matters.



How many of you are already using AI for research, brainstorming, or data synthesis?



Practical AI Research Workflow

GATHER RAW SIGNALS

- Reviews
- Event transcripts
- Customer interviews
- Reddit/community discussions
- Support tickets
- Sales call notes

USE AI TO IDENTIFY PATTERNS

- Cluster recurring themes
- Identify pain points
- Surface emotional language
- Summarize objections
- Spot topic gaps

HUMAN INTERPRETATION

- What patterns matter?
- Who is your ICP?
- What's emotionally driving this?
- What deserves action?
- What's our positioning?



Yelp's AI Is Changing How Customers Discover & Choose

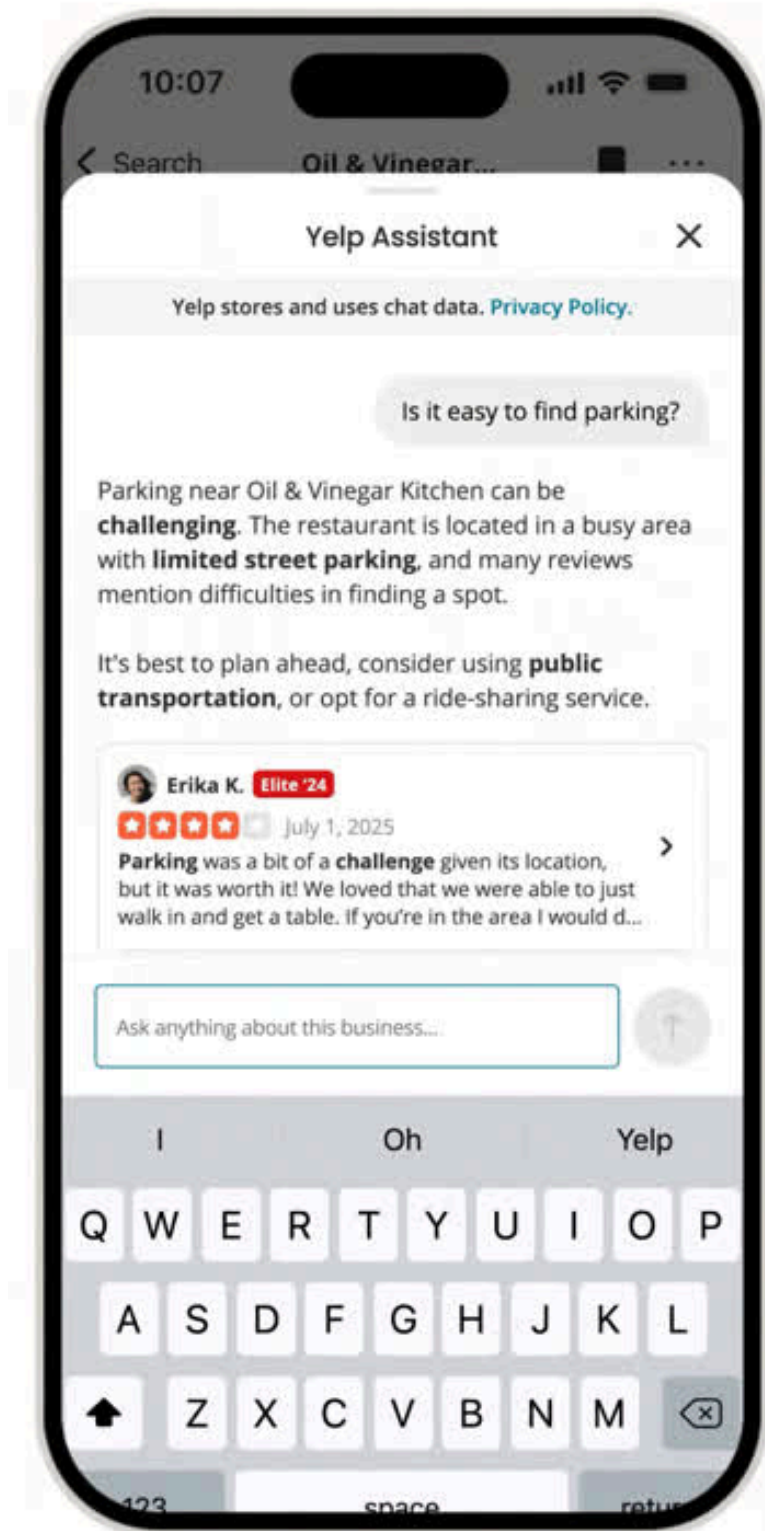
AI Analyzes: reviews, photos, menu items, customer sentiment, recurring behaviors, and themes.

Then helps customers quickly answer:

- *“Is this place worth trying?”*
- *“What’s the vibe here?”*
- *“What should I order?”*
- *“Is it good for remote work, families, or date night?”*
- *“Are there recurring complaints I should know about?”*

Result:

- Faster discovery
- Reduced cognitive load
- More personalized recommendations
- Higher confidence during decision-making



AI is only as good as the thinking behind the prompt.

~~Write me a persona for this audience.~~

Act as a strategic audience researcher and customer journey strategist. Based on the audience insights below, help me build a realistic, research-informed audience profile. The **audience** is [B2B/B2C], primarily [new/returning] **customers** who are **acting** as [decision-makers/influencers/end users]. They are trying to **solve problems related to** [insert problems discussed], and are **primarily motivated** by factors like [save time, reduce stress, grow revenue, feel confident, simplify a process, feel understood, etc.]. Their **behavior may be influenced** by emotions such as [insert emotion]. **We already have information** from customer interviews, reviews, support conversations, search behavior, campaign performance, and social engagement, which are attached. However, we also want to acknowledge **potential assumptions or blind spots**, including projecting our own preferences, ignoring certain audiences, missing context, or oversimplifying behavior. Based on this information, **provide a concise audience summary, key pain points and motivations, likely awareness-stage questions, trust signals** they may need before taking action, relevant messaging angles, and content ideas that would genuinely resonate. Clearly separate known information from assumptions or hypotheses, and do not invent details we have not provided.



Turning One Event Into Six Months of Content

Before AI

Weeks Spent:

- Reviewing footage
- Pulling quotes
- Organizing themes
- Building content calendars manually

With AI Support

- Organize transcripts
- Cluster recurring themes
- Surface missed opportunities
- Accelerate planning and repurposing

Strategy Driven by Human Judgment

- Audience understanding
- Positioning and messaging
- Prioritization
- Emotional intelligence
- Business context

Results

- 50+ videos created
- 6 testimonials
- 100+ communications
- 1 book
- Content mapped across personas & journey stages

Content Inventory

Marketing Asset Inventory | Fly by Darwin | Fly Content Calendar | Pool > Darwin | Project Request Form | evolve nyc journeys | ev

Book Chapters	Content Type	Topic
Chapter 1: Welcome to the Other Side	[Video] Quick Tip	Keynote Quick Tip #1 - You're n
Chapter 1: Welcome to the Other Side	Blog	Digital Transformation Without t
Chapter 1: Welcome to the Other Side	Blog	What Keeps Publishers Up at Ni
Chapter 1: Welcome to the Other Side	[Video] Quick Tip	Keynote Quick Tip #2 - Legacy
Chapter 1: Welcome to the Other Side	Blog	Overcoming the Fear of Change
Chapter 2: The Legacy Dilemma: Why We Still Run Bus	[Video] Quick Tip	Keynote Quick Tip #6 - Hypersc
Chapter 2: The Legacy Dilemma: Why We Still Run Businesses Like It's 1983	Blog	The Truth About Software Migr
Chapter 2: The Legacy Dilemma: Why We Still Run Businesses Like It's 1983	Blog	From Legacy to Leading-Edge: I
Chapter 2: The Legacy Dilemma: Why We Still Run Businesses Like It's 1983	Blog	Top 5 Myths About Migrating to
Chapter 2: The Legacy Dilemma: Why We Still Run Businesses Like It's 1983	Blog	What Happens If You Don't Migr
Chapter 2: The Legacy Dilemma: Why We Still Run Businesses Like It's 1983	Blog	Its more expensive to keep Lega
Chapter 3: The Lift and Shift Reframed	[Video] Quick Tip	Keynote Quick Tip #3 - The Mo
Chapter 3: The Lift and Shift Reframed	[Video] Quick Tip	Keynote Quick Tip #4 - Don't Fe
Chapter 3: The Lift and Shift Reframed	[Video] Quick Tip	Keynote Quick Tip #8 - It's Not
Chapter 3: The Lift and Shift Reframed	Blog	Tech at Hyperspeed: How to Mo
Chapter 3: The Lift and Shift Reframed	Blog	10 considerations for Software C
Chapter 3: The Lift and Shift Reframed	Blog	Niche software v. all inclusive s
Chapter 3: The Lift and Shift Reframed	Blog	Decoding Industry Jargon: Why
Chapter 4: The Illusion of "Done"	[Video] Quick Tip	Keynote Quick Tip #5 - Agentic
Chapter 4: The Illusion of "Done"	[Video] Quick Tip	Keynote Quick Tip #7 - Trillions
Chapter 4: The Illusion of "Done"	[Video] Quick Tip	Keynote Quick Tip #9 - You're th
Chapter 4: The Illusion of "Done"	[Video] Quick Tip	Quick Tip #2: Personalization is
Chapter 4: The Illusion of "Done"	[Video] Quick Tip	Quick Tip #3: Personalization is
Chapter 4: The Illusion of "Done"	Blog	Subscription Management Evolu
Chapter 5: From SaaS to PaaS: Becoming the Platform	[Video] Quick Tip	Quick Tip #1: Think life Netflix, S
Chapter 5: From SaaS to PaaS: Becoming the Platform	Blog	From Monoliths to Modular: Why

A Quick Note on Search: Discovery is Changing

Old Search

Search > Click Links > Visit Websites

Keyword-heavy SEO content

Generic “Top 10” blogs

Content written for algorithms

AI Search

Search > AI summarizes answers

Expertise and original insight

Clear, trustworthy perspectives

Content written for humans

AI Systems are Increasingly Prioritizing:

Expertise • Topical Authority • Trustworthiness • Clarity • Structured, Useful Content • Strong Communities & Engagement



I help entrepreneurs create legacy-building companies -
21h • 🌐

A few months ago I said SEO was dead.

The comments were brutal.... more



Digital Leader SEO/PPC at Leasing.com
2d • 🌐

SEO is DEAD!

Sigh.. okay, lets talk.... more



Organic Growth Architect for B2B SaaS | Ex-Canva | Founder ...
[Visit my website](#)
2d • 🌐

+ Follow ...

The “SEO is dead” debate is proof that most people never understood what SEO was for.



Awareness, a Summary

Awareness Isn't About Reaching *Everyone*. It's About Understanding the *Right People Deeply*.

Consideration



What helps you to *trust*
something online?



The Goal Isn't More Content. It's Faster Confidence.

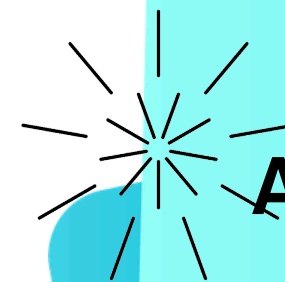
Personalization works best when it reduces effort, friction, and uncertainty.

People don't want:

- More *noise*
- More *choices*
- More *friction*
- More things to *compare*

They want:

- **Relevance**
- **Clarity**
- **Trust**
- **Confidence**
- **Faster decisions**



AI can now help:

- Surface more relevant information
- Adapt messaging in real time
- Identify behavioral intent signals
- Reduce cognitive load
- Simplify decision-making
- Shorten the path to confidence



HOSPITALITY

How to train hotel housekeeping inspectors

Training hotel housekeeping inspectors requires a structured onboarding program, a room inspection checklist, and a short assessment. POPProbe...

6 modules 2,400+ teams

Preview free →

FOOD SERVICE

How to train restaurant food safety teams

Training restaurant food safety teams requires a structured HACCP-based onboarding program, temperature monitoring protocols, and a food...

5 modules 3,100+ teams

Preview free →

CONSTRUCTION

How to train construction site inspectors

Training construction site inspectors requires a structured OSHA-aligned onboarding program, a site safety inspection checklist, and a competenc...

7 modules 1,800+ teams

Preview free →

PROPERTY MANAGEMENT

How to train property management inspectors

Training property management inspectors requires a structured onboarding program covering habitability standards, unit inspection protocols,...

5 modules 1,200+ teams

Preview free →

LOSS CONTROL

How to train loss control inspectors

Training loss control inspectors requires a structured survey methodology, onboarding program, property risk assessment protocols, and a field inspector competency assessment.

6 modules 900+ teams

Preview free →

OSHA GENERAL INDUSTRY

How to train forklift operators on OSHA safety

Training forklift operators requires a two-part program under OSHA 29 CFR 1910.178(b). Classroom instruction covering truck-related and...

6 modules teams

Preview free →

OSHA GENERAL INDUSTRY

How to train authorized employees on lockout/tagout

Training authorized employees on lockout/tagout requires a program covering recognition of hazardous energy sources, type and magnitude ...

7 modules teams

Preview free →

OSHA GENERAL INDUSTRY

How to train confined space entry attendants

Training confined space entry attendants requires a program covering hazard recognition, atmospheric monitoring, communication protocol...

7 modules teams

Preview free →

OSHA GENERAL INDUSTRY

How to train machine guarding inspectors

Training machine guarding inspectors requires a program covering point-of-operation hazards, guard types and selection criteria, interlock... systems, presence-sensing devices, and...

6 modules teams

Preview free →

Let's Do a Group Exercise

[Works Offline](#)

Operations execution **made simple**

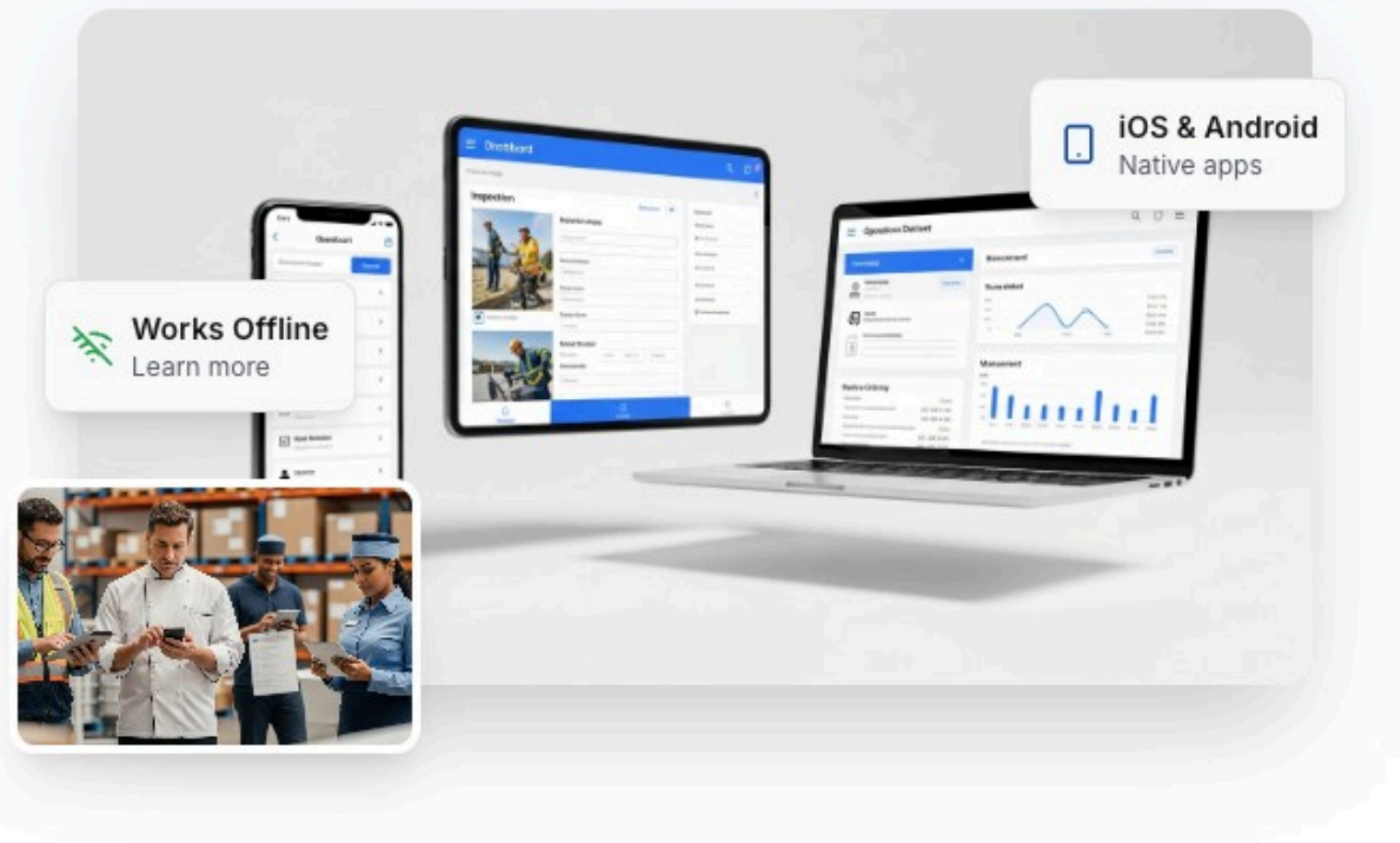
is a mobile-first, offline-capable platform designed for frontline teams. Checklists, audits, SOPs, training, and more. All in one place.

[▶ See It In Action](#)[↓ Download Checklists](#)

✔ Trusted by 500+ operators

✔ 50,000+ sites worldwide

★★★★★ 4.9/5



USED BY INSPECTION TEAMS AT

[Google](#)[Samsung](#)[Dnata](#)[Massachusetts General Hospital](#)[Sysco](#)[Marriott](#)[Cardinal Health](#)[Siemens](#)[World Food Programme](#)[Servpro](#)[DePaul University](#)[B&G Foods](#)

Restaurant & Food Service Analytics

Interactive Demo Dashboard

Restaurant & Food Service

Average

All Locations

Average: Industry standard performance

Overview Locations Insights Reports

Food Safety Score

-0.6%

78 %

Benchmark: 95% Target: 98%

Line Check Compliance

-0%

82 %

Benchmark: 90% Target: 95%

Line Check Completion

+0.5%

86 %

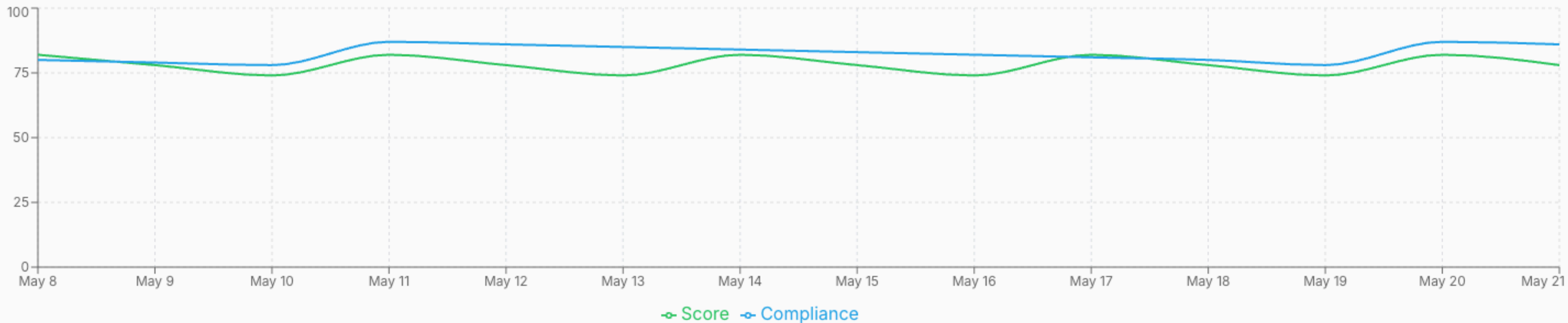
Benchmark: 95% Target: 98%

Critical Issues

-1

9

Performance Trends (14 Days)



Attendance and Roster Management

Every plan includes basic clock-in and leave requests. Roster scheduling, shift management, and AI features unlock at higher tiers.

Feature	Starter	Professional	Enterprise	Loss Control
Clock in / out, my attendance	✓	✓	✓	✓
Leave requests	✓	✓	✓	✓
Team attendance view	-	✓	✓	✓
Multi-shift sessions	-	✓	✓	✓
Weekly roster grid	-	✓	✓	✓
Shift swap and open shifts	-	✓	✓	✓
Leave balance tracking	-	-	✓	✓
Advanced reports and exports	-	-	✓	✓
Geofencing enforcement	-	-	✓	✓
WhatsApp clock-in and alerts	-	-	✓	✓
Telegram bot integration	-	-	✓	✓
HRMS payroll export	-	-	✓	✓
AI roster auto-fill	-	-	✓ uses credits	✓ uses credits
AI conflict detection	-	-	✓ uses credits	✓ uses credits
AI attendance insights	-	-	-	✓ uses credits
AI pattern prediction	-	-	-	✓ uses credits

AI features consume credits per use. Credit packs are sold separately and roll over month to month. [Learn more about attendance features](#)

Why Generic Experiences Are Becoming Less Effective

01



Cognitive Overload

Too many features, pricing tiers, & tables make it harder for customers to understand value.

02



More Choices ~~≠~~ Better Decisions

When people feel overwhelmed, they often delay decisions or avoid making one at all.

03



Features Don't Create Value

Most buyers care less about feature lists and more about outcomes, relevance, and solving a real problem.

04



AI is Changing Expectations

People are expecting faster answers, simpler comparisons, and more guided decision-making experiences.

05



Trust Matters

Clear, focused experiences often build more confidence than overwhelming customers with information.



Diagnose Uncertainty Before Creating Content

Ask: What is preventing this person from moving forward?

1 - Identify Hesitation Signals

- ❑ Pricing page revisits
- ❑ FAQ engagement
- ❑ Review consumption
- ❑ Competitor comparisons
- ❑ Drop-off points
- ❑ Support questions

2 - Diagnose Real Uncertainty

- ❑ Trust issue?
- ❑ Too many choices?
- ❑ Unclear value?
- ❑ Missing proof?
- ❑ Confusing Onboarding?
- ❑ High perceived risk?
- ❑ Pricing?

3 - Use AI To Help Reduce Friction

- ❑ Personalize Messaging
- ❑ Surface Relevant Proof Points
- ❑ Trigger Next-Best Actions
- ❑ Summarize Complex Info
- ❑ Dynamic Onboarding
- ❑ Recommend relevant content

4 - ALWAYS Measure What Happens Next

- ❑ Faster Decisions
- ❑ Higher Activation
- ❑ More Engagement
- ❑ Reduced Drop-Off
- ❑ Better Conversion quality
- ❑ Increased Confidence



Decision



What makes *you* hesitate before clicking buy or signing up?



Decision Changes Based on Risk

The higher the risk, cost, or complexity...

The more humans want reassurance from other humans.

Lower-Stakes B2C Decisions

“Is this site legit?”

Promo code searches

Reading reviews

Return policy checks

Cart abandonment

Shipping/Tax evaluation

Trust badges

Higher-Stakes B2B Decisions

“Can we trust this vendor?”

Security questionnaires

Executive approvals

Legal review & procurement

Pilot programs

ROI validation

Customer reference calls



A Quick B2B Exercise

The Scenario: An institutional roadblock where the CFO has demanded sudden, immediate proof of 90-day ROI before allowing the champion to sign the red-lined contract.

The “Think First” Prompt:

Act as a **seasoned B2B product marketing manager** specializing in sales enablement. Our prospect champion has fully completed contract redlines for our enterprise tier, but the deal has stalled at the signature line because their CFO is **demanding immediate, granular ROI proof** within the first 90 days of deployment.

Draft a **highly collaborative, supportive, and low-pressure email** from the Account Executive to our internal champion. **Do not pressure them for the signature.** Instead, the goal is to **arm them to win their internal battle.** Include a **concise, 4-bullet point executive business case framework** directly inside the email titled *'90-Day Resource Efficiency Blueprint'* that the champion can copy-paste or forward straight to their CFO. **Focus the bullet points on** how our tool reduces manual team workflow hours by 40% in month one, cuts software overlap costs, and accelerates time-to-value without needing extra IT headcount. I'm attaching key metrics and case studies to build the proof points. Keep the overall tone empathetic, professional, and deeply consultative.

A Quick B2C Exercise

The Scenario: A consumer experiencing severe hesitation at the payment screen due to fear of sizing issues and return policy friction on a high-ticket item.

The “Think First” Prompt:

Act as a Conversion Rate Optimization (CRO) and UX copywriting expert for an e-commerce brand. A customer has a \$100 winter jacket in their cart, has entered their credit card details, but is hesitating at the final *'Place Order'* button. Our behavioral analytics indicate that their **main friction points are a fear of sizing mistakes and the hassle of a painful return process.**

Draft copy for a subtle, high-trust micro-modal or dynamic banner that **triggers only when behavioral hesitation is detected on the payment screen.** The copy must **directly alleviate return anxiety** without resorting to aggressive or spammy sales tactics. **Write a clear, reassuring headline** (under 6 words), a **2-sentence body paragraph** explaining our *'Zero-Risk Fit Guarantee'* (which includes free return shipping, a pre-printed label in the box, and a 30-day exchange window), and a **primary call-to-action button that reinforces confidence** rather than just a transaction. Keep the tone warm, reassuring, and premium.

✕

Klarna

**Pay at your own pace,
from 0% interest**

See how much you can spend with Klarna before you check out. This **will not** impact your credit score.

See plans for \$250 ✎

Example plans

Pay in 4
\$62.50 every 2 weeks
\$0 interest

How it works

- 1 Enter a purchase amount
Instantly know if you are prequalified
- 2 Explore pay later plans
What you see is what you get
- 3 Save your preferred plan
Keep a plan you like for a faster checkout
- 4 At checkout, choose **Klarna**

By continuing, I authorize Klarna and its partner banks to obtain a consumer report about me for prequalification, marketing, and other uses as stated in Klarna's [User Terms](#). For Pay in 4, CA resident loans made or arranged pursuant to California financing law license. NMLS # 1353190.

See what you can spend

Every Checkout Element Is Solving For Anxiety

Trust

- Security badges
- Verified reviews
- Money-back guarantees

Risk

- Free returns
- Warranties
- Cancel anytime

Timing & Convenience

- Delivery estimates
- Fast checkout
- Apple Pay / PayPal

Social Proof

- Ratings and reviews
- UGC photos/videos
- “10,000+ sold”

Financial Confidence

- Promo codes
- Installment payments
- Transparent pricing

Decision Clarity

- FAQs
- Sizing guides
- Comparison tools
- Live chat/support



The quality of the AI output depends on how deeply you understand the buyer's anxiety

Timing, clarity, and reassurance matter more than volume.

AI can help:

- Surface reassurance faster
- Answer micro-questions
- Simplify comparisons
- Personalize support
- Identify exit intent
- Trigger next-best actions

Human Strategy Still Matters:

- Understand emotional hesitation
- Build trust and credibility
- Guide complex decisions
- Show empathy and accountability
- Know when human outreach matters
- Design experiences



In lower-risk decisions, AI may be enough.

But in higher-risk decisions, people still want: Reassurance, accountability, empathy, strategic guidance, human confirmation



Retention & Loyalty



The companies winning with AI are not just better at prompting.

They are better at *operational visibility*.



The Org that changed how I think about marketing

~~Siloed Systems~~

~~Gated Reporting~~

~~Delayed Data Access~~

~~Disconnected Teams~~

~~Reactive Decision-Making~~

Feature Adoption

Login Behavior

Support Tickets

Stakeholder Engagement

Renewal Risk

Onboarding Progress

Product Usage

Marketing, sales, CS, product, and operations were *finally* working from the same customer intelligence.



What happens after trust is earned?

Retention is driven by:

- Trust reinforcement
- Time-to-value
- Consistency
- Customer (intent) behavior
- Product usability (UX)
- Emotional connection
- Proactive communication
- Operational alignment
- Voice of Customer (VoC)
- Relationship management
- Community and belonging

Retention strategies are focused on:

B2B

- Onboarding and adoption
- Customer health scoring
- Usage/engagement signals
- Renewal forecasting
- Expansion readiness
- Stakeholder alignment
- Customer education
- Strategic relationship management

B2C

- Loyalty personalization
- Purchase cadence and habits
- Sentiment analysis
- Rewards and exclusivity
- Next-best-action recommendations
- Community and brand affinity
- Emotional connection to brand
- Frictionless repeat experiences

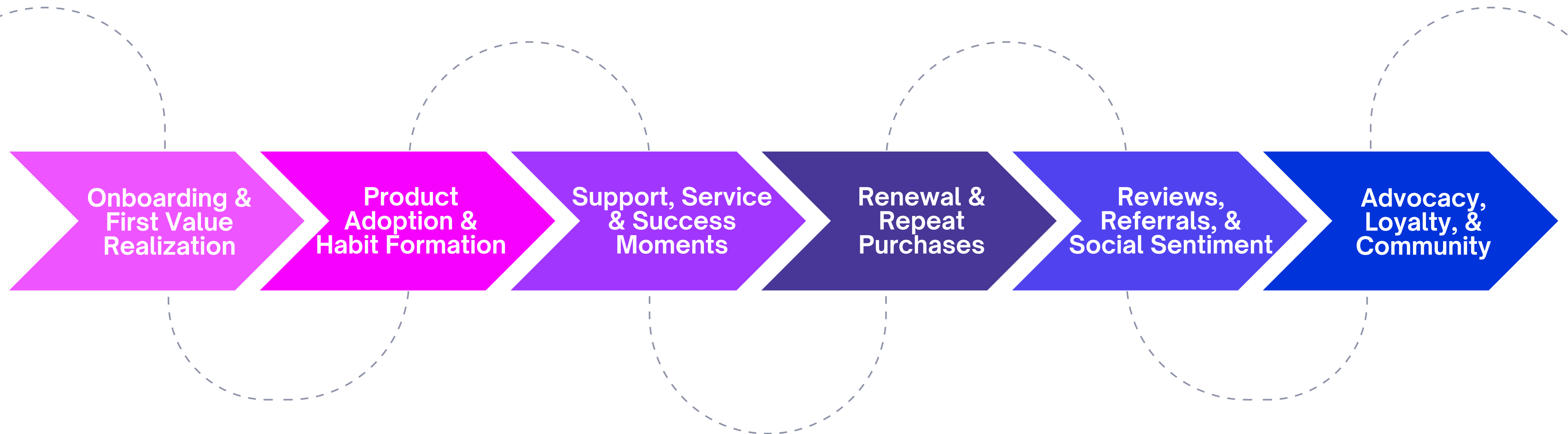


Let's talk about it! What happens after purchase?
Discuss B2B and B2C.



Retention is built through interconnected moments

You cannot effectively automate retention, loyalty, or advocacy without understanding the customer journey moments driving them.



AI becomes dangerous when organizations automate experiences they don't fully understand.



It's your first day as the marketing operations manager at Spanish55, and you were hired to solve a retention problem.

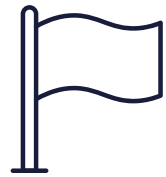
A segment of former brand advocates suddenly disappeared after canceling their subscriptions.

You need to figure out what's happening behind the scenes.

Where do you start?



The Relationship Recovery Workflow



01

CRM Flags Advocate Status

- Podcast participant
- Repeat learner
- High attendance
- Google Review
- Positive review history



02

AI Detects Behavioral Pattern

- Canceled
- Matched prior pause behavior
- No negative support history
- Inactivity over 30



03

Generic Automation Pauses

- Suppress generic win-back emails
- Avoid discount blasts
- Prevent “cold lead” workflow
- But DO NOT Ghost



04

AI Summaries, Human Strategy

- AI alert systems and an AI summary of the customer account.
- Create human outreach communication plan



05

Human Outreach

- Personalized outreach.
- Determine why they left, and incentivize as needed.

You can't automate connections. But You Can Scale Thoughtful Experiences.

AI can help brands identify **patterns**, **predict risk**, and **personalize** experiences.

But loyalty itself is still *deeply human*.

People need to feel:

- Understood
- Valued
- Supported
- Emotionally connected

In B2B: Relationships, customer success, community, and shared outcomes.

In B2C: Greater scale through personalization, consistency, convenience, and brand experience.



DATA INTEGRITY & ETHICAL DATA USE

- NEVER upload **confidential, proprietary, or sensitive** information.
- **Protect** personally identifiable information (PII)
- Follow **data privacy laws** and regulations.
- Avoid **plagiarism**. Properly **attribute sources**.
- Review AI-generated content for **bias, discrimination, or harmful assumptions**.
- **ALWAYS** maintain human oversight.
- Remember: AI models can generate false information.

Just because AI *can* access data...
Doesn't mean it *should*.



What You Can Do *Now*

Access workshop resources



The Monday Morning Audit

- **Customer Visibility:** What customer behaviors can we actually see today? What signals are missing? What decisions are based on assumptions?
- **Operational Alignment:** Who owns data? Can teams access it? Are there disconnects?
- **AI Readiness:** Is our data clean enough? Where could AI help surface patterns, risk, or opportunities earlier? Where should humans step in?

Build Your Own AI Support System

- Create a custom GPT, App, or Project for your workflow
- Use NotebookLM/Gemini to organize research and ideas
- Build a lightweight internal assistant
- Summarize meetings, transcripts, or customer feedback
- Turn long-form content into multi-channel campaigns

Build a *Think First* Prompt Library

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2026

THANK YOU!

Let's Connect on LinkedIn!

