lay shah

The AI order checklist

Let AI start the work. Keep the yes with a person.

Use this before AI touches a single customer message. The idea: **AI does the first draft, a person decides, and customer details stay private.** The example is Maya's bakery taking Sam's cake order: chocolate, Saturday, no nuts.

1 The message starts the work

AI reads each new message and drafts the order, so nobody retypes it.

- [ ] Write your rules down once: prices, pickup days and times, how you handle allergies.
- [ ] Let AI pull out the details: name, item, day, allergies.
- [ ] AI drafts the order and the reply. **It never sends.**

2 One named person says yes

AI is confident, not careful. It can promise things you never agreed to.

- [ ] Pick **one person by name** to approve. Not "the team".
- [ ] Nothing reaches a customer without their yes.
- [ ] New to this? Treat AI like a new employee's first week: it does the work, you check it.

3 The 30-second check

Before anything goes out, the person who says yes checks three things.

- [ ] **The price** — Right amount, no surprise discounts
- [ ] **The name** — Right customer, spelled right
- [ ] **Every promise** — Day, time, delivery, allergies

> Maya's cake: **$40** · **Sam** · **Saturday** · **no nuts**. All four match, so it's approved and sent.

4 Keep customer details private

On free and personal AI plans, what you type can be used to train the AI unless you switch it off.

- [ ] Turn the training switch **off**:
  - **ChatGPT: Settings › Data controls › Improve the model for everyone**
  - **Claude: Settings › Privacy › Help improve Claude**
- [ ] Delete phone numbers and addresses before you paste. The AI doesn't need them to write a reply.
- [ ] Business plans have training off by default.

Settings checked 20 Nov 2026. Menu names change; if you can't find them, look for the "training" or "improve the model" switch in the privacy settings.

Want this set up for your shop?

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