

FORMA · THE HONEST AI GUIDE

WHEN TO TRUST AI — AND WHEN NEVER.

One rule, two lists, and a cheat-sheet to screenshot.

Where AI saves you hours — and where it quietly costs you everything.

READ THIS ONCE, USE IT FOREVER

RUNS ON LOGIC? TRUST IT. RUNS ON JUDGEMENT? DON'T.

✓ TRUST AI WITH

Anything **repeatable, measurable and reversible** — volume, speed, memory and first drafts.

✗ NEVER TRUST AI WITH

Anything **human, high-stakes or hard to undo** — people, values, taste and the final call.

HAND THESE OVER – TODAY

TRUST AI WITH.

- ✓ Replying to **500 leads a day** — instantly, 24/7
- ✓ Writing the **first draft** of emails, replies & summaries
- ✓ **Qualifying leads** before they reach your sales team
- ✓ **Scheduling & rescheduling** every meeting automatically
- ✓ Following up for **60 days straight** without forgetting one
- ✓ Finding the **pattern** in piles of business data

The thread: **anything that runs on logic, volume or memory.** Boring, repeatable, checkable — let it run.

KEEP THESE — THEY'RE YOURS

NEVER TRUST AI WITH.

- × Deciding **who to hire** — or who to let go
- × Deciding **what your brand stands for**
- × Choosing **which clients to walk away from**
- × **Reading the room** in a live negotiation
- × Knowing **when to stop pushing** a deal
- × Deciding **what the data means** for your business

The thread: **anything that runs on intuition or carries human weight.** AI can inform it — it can't own it.

THE WHOLE RULE, SIDE BY SIDE

SAVE THE LINE BETWEEN THE TWO.

● TRUST AI	● NEVER TRUST AI
Reply to 500 leads a day	Decide who to hire
Draft the first email	Define what your brand is
Qualify leads	Read the room in a deal
Follow up for 60 days	Know when to stop pushing
Find patterns in data	Decide what data means
Everything on logic	Everything on intuition



Want an agent that only ever touches the **green column?** That's the line we build to.

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