



ASCENDEA

AI / BUSINESS GROWTH / PRACTICAL GUIDE

Building a Responsible Discovery-Call Pipeline

A UK-focused practical guide for founders of responsible AI services offers. It helps readers define a bounded offer, research prospects carefully, run compliant outreach, hold useful discovery calls and assess AI pilots with human review and fallback controls.



Author: Rob Arnold

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A practical UK guide to earning relevant conversations for a new AI services offer — without misleading claims, indiscriminate outreach or unsafe promises.

Author: Rob Arnold

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What this guide is for

A discovery call is an early commercial conversation in which both parties decide whether a problem is real, whether there may be a fit and whether a sensible next step exists. It is not proof that a prospect will buy, and a booked call is not a client.

This guide helps UK SME founders and responsible AI service providers build a repeatable, measured routine for starting relevant conversations. It covers three routes: a warm introduction, professional-networking outreach and carefully controlled B2B email. It also gives you a compliance gate, practical message structures, a tracker, a call agenda and an independent checklist.

The aim is not to manufacture a particular number of calls or clients. The aim is to learn, with evidence, whether a clearly bounded offer reaches a real buyer at an appropriate time. The activity volumes, time blocks and arithmetic in this guide are **illustrative planning choices**, not benchmarks, legal safe harbours or performance promises.

Content and direct outreach have different jobs

Useful public content can help a buyer understand your thinking and check whether your approach is credible. It should be accurate, helpful and free of invented results. It is rarely a reason to delay all direct commercial learning until an audience appears. A small, compliant outreach routine can produce earlier feedback on the buyer, problem and wording; content can then reflect what you have genuinely learned without disclosing confidential information.

Neither route is guaranteed. Do not choose between them on a universal timetable. Use the time and capability you have: maintain a modest evidence-led content habit if it helps your audience, while reserving a controlled block for relevant conversations.

Plan backwards without pretending to know the rate

You can use simple arithmetic to make a personal activity plan, but only with your own clearly defined cohort data. For example, if your records later show that **4** exploratory calls were booked from **50** distinct, compliance-cleared first messages over a stated period, the descriptive rate for that cohort is $4 \div 50 = 8\%$. If you chose an illustrative next-period planning goal of **4** comparable calls, the calculation $4 \div 8\% = 50$ first messages describes the volume implied by that historical assumption.

That is not a prediction or a benchmark. A different buyer, message, channel, season, offer or sample size can change the result. Use the arithmetic to expose assumptions, then revise it as your own evidence improves; do not use it to justify generic bulk outreach.

Fictional example: Priya has experience in service operations. Her initial offer is not “AI transformation”. It is a short assessment for small property-maintenance firms that want to reduce manual sorting of incoming repair enquiries. Any later pilot would prepare internal routing suggestions only, keep uncertain or urgent cases with a person and retain the existing manual route. Priya can explain both the useful outcome and the boundary.

Start with a conversation worth having

Outreach cannot repair an unclear offer. Before searching for contacts, write a short statement that names the buyer, the process, the useful outcome you can responsibly explore and a safeguard.

I help **[specific buyer]** examine **[specific process problem]** using **[capability I can actually deliver]**, with **[human review, permission or scope boundary]**.

For example: “I help operations leads at small field-service firms assess whether incoming job enquiries can be sorted more consistently using AI-assisted classification, with human review for uncertain or urgent requests.”

This is deliberately narrower than a claim that AI will save a percentage of time or produce a particular financial return. You may later describe a measured result if you have permission, a sound baseline and enough context. Until then, use language such as “assess”, “test” and “explore”.

Define who is and is not a fit

Write down the following before you add a name to a list:

- **Buyer and role:** Who feels the problem, who owns the process and who approves a change?
- **Process:** What recurring work is being discussed? Where does it start and end?
- **Observable consequence:** Is the issue delay, duplication, missed information, inconsistent handling, avoidable interruption or something else the buyer can describe?
- **Minimum evidence:** What public event or problem signal would make contact relevant now?
- **Practical exclusions:** Which organisations, sectors, use cases or claims should you not pursue yet?
- **Offer boundary:** What will your first step produce? For example, a process map and a limited assessment rather than a production system.

A buyer is not automatically a fit because they are interested in AI. If you cannot explain the current process, the prospective consequences of a mistake and the person who would review the output, do not imply that you have a ready solution.

Use a real change, not a generic hook

A useful trigger is a verifiable, recent change that may affect the process you understand. It is a reason to investigate relevance, not proof that the organisation has a problem or budget.

Potentially relevant public signals include a new location, a newly announced service, a confirmed contract win, a hiring pattern connected to the process or a named operational initiative. Record the source URL and date. Do not turn a rumour, an old company description or a personal milestone into a claim about internal pressure.

Use this test:

- **Specific:** Can you name the public event accurately?
- **Recent:** Is it current enough to matter?
- **Relevant:** Can you make a modest, credible connection to the process?
- **Respectful:** Would the recipient recognise the observation as reasonable rather than intrusive?
- **Truthful:** Have you avoided inventing a client result, mutual connection or knowledge of their priorities?

If the answer is no, remove the hook. A generic message is not improved by adding volume.

Put UK outreach safeguards before activity targets

Direct marketing law depends on the contact method, the subscriber type and whether you are processing personal data. This section is a working control, not a substitute for legal advice. The ICO's B2B marketing and AI guidance is under review following the Data (Use and Access) Act, so recheck the official pages before implementation.¹

Distinguish the recipient before you contact them

Under PECR, companies, LLPs, Scottish partnerships and certain other bodies with separate legal personality are generally **corporate subscribers**. Sole traders, many ordinary partnerships and other unincorporated bodies are **individual subscribers** and receive stronger protections. The status of the subscriber matters; an employee's work address at a company is generally associated with the corporate subscriber, but using their identifiable contact details still involves personal data and UK GDPR duties.¹

For **email, text and other electronic mail**:

- The PECR electronic-mail rule does not apply to corporate subscribers, but you must not conceal your identity and must provide a valid way to opt out. Good practice is to screen against a suppression list and honour a corporate opt-out.¹
- Do not treat a sole trader or an uncertain business type as a corporate subscriber. For individual subscribers, consent is generally required unless the narrow soft opt-in conditions apply. A new cold outreach campaign will not normally meet a previous-customer soft opt-in condition. When status is uncertain, verify it or use the more protective route.¹
- PECR's definition of electronic mail is broad and can include stored social-media direct messages. A connection being accepted is not, by itself, consent to marketing. Treat direct messages cautiously and do not use automated messaging or bulk connection tools.¹

For **personal data** used in B2B outreach, including a named business contact or an identifiable work email address:

- Decide and document a lawful basis before processing. Consent and legitimate interests are commonly relevant, but legitimate interests requires a purpose, necessity and balancing assessment; it is not a label to apply after the fact.¹
- Tell people about the marketing use of their data. If data comes from another source, the ICO says privacy information is generally required within a reasonable period and no later than one month, unless an exception applies.¹
- Keep data to what is needed for the relevant contact. A public profile or email address is not a blanket permission to use it for direct marketing.¹

- An individual has an absolute right to object to use of their personal data for direct marketing. Stop that use when they object and keep only the minimum suppression data needed to respect the preference.²

Telephone marketing, automated calls, texts and AI voice outreach have their own rules. Screen relevant preference services and objections before live calls; do not make automated marketing calls without the required consent. Do not assume rules for corporate email carry over to voice outreach.¹

Your outreach readiness gate

Complete every item before sending an unsolicited message:

- ☐ I can state the exact business purpose of this contact and why this person or organisation is relevant.
- ☐ I have classified the subscriber as corporate, individual or unknown; unknown is treated protectively.
- ☐ I have not used sensitive, confidential, scraped or unnecessary personal data.
- ☐ I have recorded the source of the contact data, date collected and my lawful-basis assessment where personal data is processed.
- ☐ I can provide clear privacy information and a working contact route.
- ☐ I have screened the contact and organisation against my suppression and objection records.
- ☐ The proposed message identifies me and my business honestly, makes no unsupported result claim and offers a simple opt-out.
- ☐ I have checked relevant platform terms and have not used prohibited automation.
- ☐ I have a person and process ready to recognise, record and act on objections.

If any box is unticked, do research or seek advice instead of sending the message.

Build a small, evidence-led prospect list

Start with a deliberately small list that you can research and administer well. A spreadsheet or CRM is sufficient if it can record decisions, suppression requests and the source of your information. Do not create a large, unreviewed list merely to make activity look productive.

For each potential organisation, record:

- organisation name and public website;
- legal/subscriber classification and how you checked it;
- business type, approximate fit and the process hypothesis;
- relevant public event, source URL and date;

- named contact only where necessary, plus the source of that information;
- chosen channel and compliance decision;
- privacy-information route, lawful-basis note and suppression screening date;
- messages sent, replies, objections, agreed next step and deletion/review date.

Do not store personal commentary, guesses about health, family, ethnicity, politics or other sensitive characteristics. A sales hypothesis should concern the work problem, not a person's private life.

Use AI only as a bounded research aide

AI can help you summarise information you are permitted to review, but it is not an authority on what is true, lawful or appropriate to send. Do not paste passwords, API keys, client documents, personal data beyond what is strictly necessary, private CRM exports or confidential meeting notes into a general-purpose AI tool. Check your provider's terms, retention settings and the client's permissions before using any tool.

Use this **optional research prompt** only with publicly available, non-sensitive information and only after you have decided that this kind of processing is appropriate:

Context: I am researching a UK business for a possible B2B conversation about [narrow process]. The text below is publicly available and may be incomplete. Do not infer private facts, identify personal contact details, make legal conclusions or claim that the business has a problem.

Input: [Paste a short public announcement, webpage extract and source URL/date. Do not include credentials, confidential documents, customer records or unnecessary personal data.]

Task: 1. List only the explicit, verifiable operational changes stated in the input. 2. Separate confirmed facts from possible process questions. 3. Draft up to three neutral opening lines that ask whether [process] is a current priority. Do not claim results, familiarity, consent or a prior relationship. 4. State the source URL and date that a human should verify before use. 5. If the input does not support a relevant opening, say "No suitable evidence — do not contact on this basis."

Human review before use: open the source yourself; confirm the event and date; remove speculation; check the recipient and channel against the readiness gate; edit the wording in your own voice; and send nothing that your records or a qualified adviser say is inappropriate. Never let this prompt automatically enrich a contact list, send a message or place a person into a follow-up sequence.

Use three routes to start conversations

Use the route that fits the relationship and compliance position. Do not push every person through every channel. A relevant warm introduction may be sufficient; a low-confidence cold email may not be justified at all.

Route 1 — ask your existing network for a relevant introduction

A warm introduction can save a recipient the effort of deciding whether an unknown sender is credible, but it is not an endorsement or permission to market to them. Ask the mutual contact to make the introduction themselves. Do not ask them to hand over someone's personal contact details without thought.

A concise, truthful request:

Hello [Name] — I am testing a focused service for [specific buyer] around [specific process problem]. I am looking to speak with people who currently manage that process, to understand what is and is not useful. If someone comes to mind and you think it is appropriate, would you be comfortable introducing us? No pressure if not.

Make one or two specific asks in a week rather than broadcasting a vague “Who needs AI help?” message. Log who you asked so you do not repeatedly burden the same people or misrepresent an introduction as a referral.

Route 2 — professional-networking outreach

Professional networking can be a useful way to research relevant work and request a connection. It is not permission to mass-message people or bypass their preferences. Use the platform manually, comply with its current terms and avoid tools that scrape, sequence or send messages without meaningful human review.

A connection note should explain why you are connecting without forcing an offer:

Hello [Name], I saw [specific, public and recent item]. I am learning how [role] teams handle [narrow process] during [relevant change]. I would value connecting if that is useful to you.

After an accepted connection, do not assume the person wants a pitch. If a contact is appropriate under your compliance process, a permission-led follow-up can be more respectful:

Thanks for connecting. I work on a narrowly defined assessment of [process] for [buyer type], with [human-review boundary]. Is this a current priority for your team? If not, please say so and I will not follow up.

Only say “I work on” if that statement is accurate. If you are validating a new offer, say so. Do not invent clients, outcomes or a mutual connection to make a message sound established.

Route 3 — targeted corporate email

Use unsolicited electronic marketing only when the subscriber classification and UK GDPR position have been checked. For a corporate subscriber, the message must identify you and provide a valid opt-out route; if personal data is involved, your wider UK GDPR obligations still apply.¹

Keep a first message short, relevant and easy to decline. This structure is more useful than a long explanation of tools:

Subject: Question about [confirmed public event]

Hello [Name],

I saw [specific, verifiable change] on [source/date]. It made me wonder whether [specific process] is a current issue for your team.

I offer a small, bounded assessment for [buyer type] to map the process and decide whether a supervised AI or non-AI improvement is worth testing. It does not assume a build is the right answer.

Would a short exploratory conversation be useful? If not, reply “no” or “opt out” and I will not send further marketing.

[Your name] · [Business name] · [working reply/opt-out route] · [privacy-information link]

Avoid false “Re:” subject lines, attachments used to create pressure, hidden tracking, a tool catalogue or a claim that AI will deliver a specific saving. A genuine public event is enough context; it does not justify inventing urgency.

A restrained 3–7–7 follow-up pattern

A follow-up schedule is an administrative aid, not a right to keep contacting someone. The following **illustrative** pattern is suitable only where your compliance decision remains valid and the contact has not declined, objected or become clearly irrelevant:

- **Day 0:** Send the first, reviewed message.
- **Around Day 3:** Send one short follow-up that restates the single question. Do not manufacture a case study or new claim to fill the space.
- **Around Day 10:** Send a final close-the-loop note. State that you will not continue active follow-up on this topic.

Example second message:

Hello [Name], I am following up on my question about [process] after [public event]. It may not be a priority. If it is not relevant, a brief “no” or “opt out” is enough and I will update my records.

Example final note:

Hello [Name], I will close this out after today. If [process] becomes a priority and a short assessment would be useful, you can reply here. Otherwise, no action is needed; I will not send further marketing about this.

Stop immediately if a person objects, asks not to hear from you, withdraws consent or shows that the message was inappropriate. Suppress their marketing details promptly. Do not move them into an automatic 90-day re-contact programme. A genuinely new, relevant event months later is not a licence to ignore their preference; check the record and the legal position again.

Set a sustainable working rhythm

Regularity helps you learn from comparable activity, but a routine must not override judgment, client commitments or compliance. The following is an **illustrative** working pattern for an early-stage founder. Scale down if you cannot research and administer each contact properly.

Example weekly routine

Monday — define and verify (45–90 minutes). Review the offer, research a small number of organisations and classify subscriber type. Record public sources and remove weak or non-compliant prospects before any message is drafted.

Tuesday — write and review (45–90 minutes). Draft a handful of individual messages around confirmed, current information. Run the readiness gate. Process replies and objections before adding new outreach.

Wednesday — relationship work (45–90 minutes). Send a small number of manual, relevant connection requests or ask one trusted contact for a specific introduction. No connection request or direct message should be sent merely to meet a quota.

Thursday — follow-up and conversation preparation (45–90 minutes). Send only earned, compliance-cleared follow-ups. Confirm calendars, prepare discovery questions and record no-response decisions accurately.

Friday — review and improve (30–60 minutes). Update the tracker, process suppression requests, review whether the public signal was truly relevant and choose one small change to test next week.

The original idea behind a fixed daily block is useful: protect time for commercial learning rather than only delivering or tinkering with tools. However, the right volume is the amount you can pursue lawfully, personally and accurately. More names are not a remedy for poor targeting or a weak permission model.

Use an eight-week learning cycle, not a guaranteed campaign

An eight-week period is 56 days and can be a useful **illustrative** review window. It is long enough to document a small number of contact cohorts and short enough to correct a weak offer. It is not a commitment to keep using a message that causes complaints, confuses recipients or fails a compliance check.

- **Weeks 0–1:** Complete the offer statement, readiness gate, privacy/objection process and a small prospect list. Test the tracker with internal examples.
- **Weeks 2–3:** Start carefully with a small, well-researched cohort. Record replies, declines and opt-outs. Check that your operational process actually honours preferences.
- **Weeks 4–5:** Review conversation quality. Change one meaningful variable, such as buyer role, process hypothesis or opening question. Do not change targeting, offer and message all at once.
- **Weeks 6–7:** Continue only with relevant, compliant activity. Prepare for discovery calls and document what prospects say about ownership, timing and risk.
- **Week 8:** Review the whole evidence set. Decide whether to continue, narrow the offer, change the buyer hypothesis, partner for a capability gap or stop.

Correct a legal, privacy, security or honesty problem immediately. Consistency never justifies repeated unwanted contact.

Track the pipeline so the numbers mean something

A tracker is a record of decisions and conversations, not a scoreboard of messages sent. Count a person or organisation consistently. Three follow-ups to one person are not three fresh prospects.

At minimum, maintain these fields:

- **Fresh, checked prospects:** distinct organisations or contacts that passed your readiness gate.
- **Channel and date:** warm introduction, professional network, corporate email or another permitted route.
- **Message status:** drafted, reviewed, sent, delivered where known, replied, declined, objected or suppressed.
- **Conversation status:** exploratory call proposed, booked, attended, not a fit, stakeholder next step, assessment/proposal discussed or no further action.

- **Compliance record:** subscriber classification, public source, lawful-basis note where required, privacy-information route, suppression screening and opt-out result.
- **Learning:** stated problem, current workaround, decision-maker, timing, objection and next experiment.

You can calculate rates for your own learning, but always show the denominator and time period. For example:

Exploratory-call rate for a cohort = qualified calls booked ÷ distinct, compliance-cleared contacts actually sent a first message during the stated period.

This is a description of your own cohort, not a prediction of future work. Do not use a tiny sample to declare that a channel “works” or “does not work”. Read the comments, not just the ratio.

Diagnose before you increase volume

If conversations are scarce or poor quality, review in this order:

1. **Compliance and administration:** Were subscriber type, lawful basis, privacy information and suppression checks correct? Did an objection reveal a process flaw?
2. **Buyer relevance:** Does the named role own the process or have an actual reason to care?
3. **Evidence of timing:** Was the public change current and connected to the process, or did you force an interpretation?
4. **Offer clarity:** Could a recipient understand the limited first step without seeing a tool list?
5. **Message honesty and friction:** Is the question easy to decline? Does it avoid unsupported claims?
6. **Call handling:** Were offered times realistic, and did you respond quickly and clearly when a prospect engaged?

This order is intentional. Sending more messages before resolving an objection process, a vague offer or inaccurate targeting can increase harm without increasing useful learning.

Run a discovery call that protects both sides

The purpose of a discovery call is to understand the process and decide whether a proportionate next step exists. It is not to diagnose every part of a business or sell a system before you understand its data, permissions and risk.

An **illustrative, rough 30-minute agenda** can be useful, but adapt it to the prospect and obtain their agreement:

1. **Open and set expectations (about 3 minutes).** Thank them, say what you hope to understand and make clear that the call may end with “not a fit”. Confirm who should be involved if the process touches other teams.
2. **Understand the recent example (about 8 minutes).** Ask them to describe the last time the issue occurred. What happened, who handled it, what was delayed or reworked and what is the current workaround?
3. **Map the operating context (about 7 minutes).** Ask what systems, approved documents, data types, permissions and hand-offs are involved. Do not ask for confidential records simply to make a sales conversation more concrete.
4. **Test fit and boundaries (about 6 minutes).** Ask what a useful outcome would look like, what must never happen, who would review outputs and how they would cope if a service was unavailable or wrong.
5. **Agree a next step (about 6 minutes).** Possible outcomes include no action, a further conversation with the process owner, a scoped paid assessment, a request for non-confidential information or a decision to stop. Record the uncertainty rather than claiming that a proposal is the inevitable next step.

Useful questions include:

- “Can you talk me through the last time this happened, rather than the ideal process?”
- “Who owns the process, budget and risk decision?”
- “What information is permitted for this use, and what must stay out of scope?”
- “Where would a person need to review, correct or override an output?”
- “What would make a pilot not worthwhile?”
- “What existing manual route would remain available if a tool failed?”

After the call, send an accurate, brief summary of what you heard, the agreed next action and the boundaries you will not cross. Never represent a curiosity call as a commitment to buy.

Keep AI claims and demonstrations inside safe boundaries

Prospects may ask whether an assistant can “learn the business”, send messages or make decisions. Explain the actual proposed method instead of using impressive but vague language. A system that retrieves approved information is not necessarily trained on it; a draft generator is not an autonomous decision-maker; and a quick demonstration is not production evidence.

For any prospective pilot, be ready to state:

- the supported inputs and deliberately excluded inputs;
- the authorised source material and who may access it;
- the exact output, including whether it is internal-only;
- the human reviewer, escalation path and manual fallback;
- the actions the system cannot take without approval;
- how you will test representative, edge and held-out cases;
- the account owner, data/credential handling, logging and rollback arrangement.

Use least-privilege access. An AI workflow should have only the tools and permissions it needs for the agreed task. Do not allow instructions embedded in an untrusted email or document to override the system's task boundary. For consequential actions, use explicit approval steps and keep an audit trail appropriate to the risk.

If personal data is in scope, establish the roles of client, agency and providers; the permitted purpose; retention; security; and any transfer considerations. Assess whether a DPIA is required before processing. The ICO says AI use will often involve high-risk processing, but the assessment remains case-specific; document the reasoning even where you conclude that a DPIA is not required.³

For new OpenAI integrations, do not copy obsolete Assistants API tutorials. OpenAI states that the Assistants API was sunset on **26 August 2026** and directs new integrations to the Responses API.⁴ Provider documentation, product availability, prices and data terms should be verified for the actual client design.

Common obstacles and better responses

“I am not getting replies, so I need a more aggressive script.”

Do not jump to pressure or volume. Review legal status, relevance, the trigger, the offer boundary and whether the recipient has an easy way to decline. A low-reply cohort may be telling you the buyer, timing or problem hypothesis is wrong. It is not evidence that you should create urgency or automate more follow-ups.

“I do not have time for a daily outreach block.”

Choose a smaller, sustainable schedule and protect it. Five well-researched contacts that are correctly administered teach you more than a hundred that cannot be classified or honoured when they object. If client delivery has removed all commercial learning time, adjust capacity or expectations rather than sending rushed messages late at night.

“Outbound feels like spam.”

That discomfort is useful when it identifies a real problem. Check whether the message is necessary, specific, truthful and welcome enough in context. A public event does not create entitlement to contact someone, and personalisation does not cure a PECR or UK GDPR failure. Stop if the activity cannot pass the readiness gate.

“The prospect asked whether the AI can do everything.”

Say what you can support safely today. Offer a controlled assessment, an internal draft, restricted permissions and a manual fallback where appropriate. If the desired use involves regulated advice, employment decisions, health, financial decisions, high-risk personal data or a capability you do not possess, involve a qualified specialist or decline the work.

Action plan and working pages

Use these pages as a personal planning workbook. They do not deploy an email campaign, create a lawful basis, send a message or replace human judgment.

Worksheet 1 — outreach readiness

Buyer group and process:

Problem I can discuss credibly:

First bounded offer and deliverable:

Outcome I can explore without promising:

Human-review, permission and manual-fallback boundary: ____

Work I will not sell or claim yet:

Specialist advice or partner needed:

Evidence I need before contact:

Review date:

Worksheet 2 — prospect and compliance record

Organisation / business type:

Corporate, individual or uncertain subscriber — and evidence:

Role/process owner (only necessary data):

Public trigger, source URL and date:

Why the process hypothesis is relevant — facts versus assumptions:

Channel considered and platform/PECR decision:

Lawful-basis note and privacy-information route:

Suppression-screening date and result:

Message reviewed by / date:

Reply, objection, next step and retention/review date:

Worksheet 3 — discovery call notes

Who attended and their role in the process:

Recent real example of the problem:

Current process, systems and manual workaround:

Business consequence and evidence source:

Permitted data, prohibited data and access constraints: ____

Human reviewer and escalation route:

Failure conditions and manual fallback:

Fit, risks, unknowns and specialist review needed:

Agreed next step, owner and date:

Reason to stop or defer, if applicable:

Worksheet 4 — responsible AI pilot screen

Proposed task and supported inputs:

Output and prohibited actions:

Authorised documents/data and minimum permissions:

Client owner, human reviewer and approval step:

Representative, edge and held-out tests:

Accuracy, privacy, permission and unsafe-action blockers:

Manual fallback, disable procedure and rollback owner:

Data-protection/security assessment and DPIA decision: ____

Known limitations and client communication:

Decision: assess / pilot with restrictions / revise / stop:

Independent implementation checklist

Use this checklist whether or not you use the worksheets above.

Positioning and offer

- ☐ I have chosen one buyer group, one process and one bounded starting offer.
- ☐ I can explain the offer without promising a result, income, saving, client count or timetable.
- ☐ I have named the human-review, restricted-permission and manual-fallback boundary.
- ☐ I know what I will not sell, claim or automate yet.
- ☐ I have a route to qualified legal, security, data-protection or sector support where needed.

Research and data handling

- ☐ I use only necessary, relevant information and retain its source and date.
- ☐ I do not collect sensitive, confidential or excessive personal information to fill a sales list.
- ☐ I verify a public trigger before using it in a message.
- ☐ I keep private client data, credentials and unnecessary personal data out of AI prompts and research tools.
- ☐ I check a provider's current documentation, data terms and retention settings before proposing it to a client.

UK direct-marketing controls

- ☐ I classify the subscriber correctly as corporate, individual or uncertain before electronic outreach.
- ☐ I do not cold-email a sole trader or relevant partnership without the required consent or applicable exception.
- ☐ I document the lawful basis for processing identifiable business-contact data and provide privacy information.
- ☐ I identify myself honestly, use a working reply/opt-out route and do not disguise the subject or relationship.

- ☐ I screen against suppression records before every send and honour opt-outs and objections promptly.
- ☐ I treat social direct messages and automated/voice outreach as channels requiring separate, careful assessment.
- ☐ I recheck current ICO guidance or obtain advice before launching a significant campaign, because the guidance is under review.¹

Before each message

- ☐ The recipient and role fit the defined buyer and process.
- ☐ The observation is specific, recent and verifiable.
- ☐ The message asks one proportionate question and does not manufacture urgency.
- ☐ Every statement about my experience, offer and results is true and supportable.
- ☐ I have decided in advance when to stop follow-up and how to record a refusal.

Discovery call and follow-up

- ☐ I prepare questions about the actual process, data, ownership, risks and decision criteria.
- ☐ I state that “not a fit” is a valid outcome.
- ☐ I do not request confidential data that is unnecessary for the conversation.
- ☐ I record agreed facts, assumptions, risks and next steps accurately.
- ☐ I send only a truthful summary and do not imply that the prospect agreed to buy.

Pilot or proposal decision

- ☐ Any proposal distinguishes a demonstration, bounded pilot and production release.
- ☐ It defines permitted data, access, testing, human review, escalation and manual fallback.
- ☐ It makes account ownership, recurring costs, support boundaries and change control visible.
- ☐ It contains no claim that AI will be accurate, compliant, autonomous or profitable without evidence.
- ☐ I stop or bring in a specialist when the risk exceeds the capability or evidence available.

Publication details and references

1. [ICO — Business-to-business marketing](https://ico.org.uk/for-organisations/direct-marketing-and-privacy-and-electronic-communications/business-to-business-marketing/)

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2. [ICO — Right to object](https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/individual-rights/individual-rights/right-to-object/)

<https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/individual-rights/individual-rights/right-to-object/>

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4. [OpenAI API — Assistants migration guide](https://developers.openai.com/api/docs/assistants/migration)

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Author: Rob Arnold · **Ascendea:** <https://ascendea.ai/>