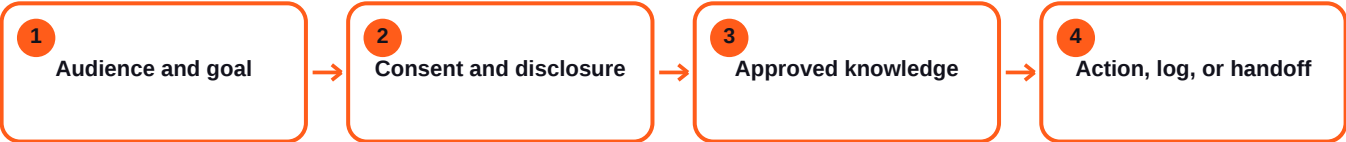


AI Avatar Project Brief Workbook

Align sales, marketing, legal, and implementation on audience, consent, knowledge, actions, handoffs, and acceptance tests.



Define your operating rules

Primary audience and outcome	
Likeness and voice consent owner	
Consent record location and term	
Approved-source owner	
CRM and calendar destination	
Human handoff owner	

Decision notes

Readiness checklist

Attach a written rule, owner, or test result to every checked line. A blank answer is a reason to keep that path out of the first launch.

- ☐ Define the audience, buying stage, channel, language, and observable successful outcome.
- ☐ Name the approved likeness or character and the exact voice source permitted for use.
- ☐ Record consent scope, channels, regions, duration, revocation process, and accountable owner.
- ☐ Approve the AI disclosure and prohibit impersonation, deceptive editing, and unsupported identity claims.
- ☐ List the current product, pricing, policy, proof, and objection sources the avatar may use.
- ☐ Name the source owner and the change that requires a knowledge refresh.
- ☐ Define required qualification fields, CRM object and fields, ownership rule, and meeting eligibility.
- ☐ Write the human path for pricing exceptions, security review, complaints, and explicit requests.
- ☐ Test unsupported claims, outdated sources, consent questions, prompt attacks, and integration failures.
- ☐ Assign ongoing owners for content, consent, integrations, analytics, incidents, and launch approval.

Test scenarios

☐ Normal buyer path Result / owner: _____	☐ Unsupported claim Result / owner: _____	☐ Consent question Result / owner: _____
☐ Outdated source Result / owner: _____	☐ CRM failure Result / owner: _____	☐ Request for a person Result / owner: _____

Ready to scope the workflow? Book a meeting at <https://getcustomavatar.com/contact>. We will review the operating rules first, then discuss scope and pricing.