

A PRACTITIONER'S VIEW

AI Without the Overwhelm: Practical AI Solutions for Everyday Business Challenges

*From the floor of a multi-unit retailer,
wholesaler, and importer of loose-leaf tea.*

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A quick word before we dive in...

- What I'm sharing today is what's working for *me*, in *my* business, *right now*.
- I am not an AI expert, but an expert in my business— and how I am using AI for advantage.
- AI tools are evolving fast — what I show you today may look different in six months, and what works at Fava Tea may not translate directly to your context.
- Take what's useful, leave what isn't, and treat this as a starting point for experimentation rather than a prescription.

High performers don't rely solely on memory. They rely on systems.

"Your mind is for having ideas, not holding them." — David Allen,
Getting Things Done

"You do not rise to the level of your goals. You fall to the level of your systems." — James Clear,
Atomic Habits

"30 seconds of jotting down topics before a conversation makes it go better — even when the list never gets used. The system does the work, not the memory." — Charles Duhigg, *Supercommunicators*

** I will be talking about this more*

Three things.

You don't have to be technical. You just have to start. Here's what you'll leave with:

01

A practical filter.

Know when AI is the right tool for the job — and when it isn't. One simple question that saves hours of false starts.

02

A working tool stack.

Five tools that cover most everyday business work. Which one to open first, and the order to add the rest.

03

A first step you can take this week.

One task. Real work. Real time back in your day. No five-year roadmap. No buying anything new.



STORY ONE • WE'VE BEEN HERE BEFORE

The 1997 website meeting.



THE SCENE

I'm in a leadership meeting in 1997 as a Marketing Manager. An executive says:
"We need a website immediately!"

No one in the room can clearly explain why, for whom, how success will be measured, or how it fits the business strategy.

Just do it.

Twenty-five years later, the same script is being read again — with AI instead of HTML. "We need ChatGPT." "Automate something." Different technology. Same gap between adoption and strategy.

KEY LEARNING

Technology itself doesn't create advantage. Strategy does.

-
- The winners asked: for whom, to what end, how will we know?
 - The losers launched reactively, with no owner and no metric.
 - Discipline beat the technology. It will again.

Why? What is our goal?

What business problem are we trying to solve?

EFFICIENCY

Do it faster, cheaper.

- Reduce cycle time
- Automate repetitive work
- Lower operating cost

EFFECTIVENESS

Do it better.

- Improve quality
- Increase accuracy
- Elevate customer experience

MARKET STRATEGY

Compete differently.

- Differentiate the offer
- Sharpen customer insight
- Speed to market

ADVANTAGE

Win durably.

- Strengthen positioning
- Scale what works
- Build decision intelligence

The goal isn't to use AI. The goal is to create value.

AI is the tool (system). Critical thinking is the map.

Be curious. Don't let speed or ease replace thinking— or communicating.

THINK FIRST

The map you bring.

- Think through what the problem actually is before you open the tool.
- Ask sharper questions, not just faster ones (this will be your prompts).
- Stay curious — but don't let AI do your thinking for you.

VERIFY ALWAYS

What to watch for.

- Hallucinations — confident-sounding answers that are simply wrong.
- Workslop — generic output that dilutes your brand and your judgment.
- Inaccurate conclusions — the right shape, the wrong substance.

Triple-check what it says — and what it's about to do. Especially when it sounds right.



STORY TWO • THE QUESTION HAS FLIPPED

A Sunday morning in Brookfield.



WHAT HAPPENED

1:30 AM. The POS and store-operations server locked up after a Windows 11 update collided with our SQL Server. My outsourced tech support wasn't answering.

Two years ago, that meant a four-hour wait, a register run on paper — or closing the store for the day.

Instead, I opened a chat window. Described what I was seeing. And got walked through service restarts, ODBC checks, and a registry edit — screenshot by screenshot.

1.5 hours

Store transacting again. Same morning.

KEY LEARNING

The question has flipped.

Two years ago:

"Can AI do anything genuinely useful?"

Today:

"Which parts of the business still don't touch AI — and is that by intention or by oversight?"



STORY THREE • THE DATA QUESTION GOT BETTER

The TEAsers read.



THE READ

When we launched a new product line, the old question was: "Is it selling?"

With AI, we asked the question we actually wanted to ask:

Is it lifting the rest of the basket?

Who is trying it?

Are they coming back?

Is their average ticket growing after first trial?

Multi-variable analysis that used to require a paid consultant or weeks of internal time — done in an afternoon, on our own data.

KEY LEARNING

Fortune 100 reads at small-business scale.

- Analytical depth is no longer a function of headcount.
- It's a function of clean data and sharper questions.
- The bottleneck moved — from doing the analysis to knowing what to ask.

TOOL 1 OF 4

THE STACK, UP CLOSE

Claude.

Anthropic · PRIMARY

The long-form thinker — reasoning, drafting, analysis, and structured output.

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WHERE I USE IT AT FAVA TEA

- Strategy memos, board updates, vendor pitches from a rough outline
- Lease and contract review — CAM, escalators, renewal in plain English
- Pro formas and cash-flow scenarios, pressure-tested
- Messy POS and shipping exports cleaned; INDEX/MATCH workbooks built fast
- Long meeting transcripts → summaries with owners and action items

HOW I USE IT

Claude is the daily workhorse. I open it for anything that needs nuance, structure, or stamina — board updates, lease reviews, even this presentation. It handles a 30-page contract and a 30-row spreadsheet in the same conversation, and it shows its reasoning so I can challenge it.

TOOL 2 OF 4

THE STACK, UP CLOSE

Perplexity.

Perplexity AI

*The research desk you can verify —
real-time, source-cited, link-
traceable.*

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WHERE I USE IT AT FAVA TEA

- Competitive scans before pricing or positioning changes
- Trade-area demographics and traffic when scouting a new site
- Regulatory questions — sales tax, food handling, franchise registration
- Industry trend reads for category planning and forecasting
- Vendor and supplier vetting — parent, funding, leadership changes

HOW I USE IT

Perplexity is where I go when the answer needs a citation. It pulls live sources and shows them, so I can verify before I act. Site-selection reads, regulatory questions, anything where being wrong has a cost.

ChatGPT.

OpenAI

The strong generalist — second opinion, image generation, custom GPTs.



WHERE I USE IT AT FAVA TEA

- A second opinion on a Claude draft — different framing, fresh angle
- On-brand image generation for social, blog, in-store concept boards
- Custom GPTs preloaded with our SOPs, brand voice, tea catalog
- Quick-turn product descriptions and short-form copy at variant scale
- Voice mode for hands-free brainstorming on the drive between stores

HOW I USE IT

ChatGPT is my second opinion. When a draft feels off and I can't name why, I'll paste it in and ask for a critique. Custom GPTs are the underrated feature — I have one trained on our brand voice and another on our tea catalog for fast product Q&A.

TOOL 4 OF 4

THE STACK, UP CLOSE

Canva.

+ *Magic Studio*

On-brand visual creation at the speed of an idea.

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WHERE I USE IT AT FAVA TEA

- Social posts, in-store signage, vendor one-pagers — minutes, not days
- Magic Resize — one design pushed cleanly to every channel
- Background removal and AI photo cleanup without a studio
- Brand kits that lock fonts, colors, and logos for the whole team
- AI text-to-image for ideation (not as a substitute for real product photography)

HOW I USE IT

Canva is where strategy becomes something a customer actually sees. I draft the campaign in Claude, the visuals come out of Canva, and the team can adjust without a designer in the loop. Magic Resize alone saves us a half-day a month.

AI-native vs AI-dependent.

AI-NATIVE

Uses the tool to think faster and further — with precision.

AI-DEPENDENT

Can't think or create without it. Employers can tell inside two weeks.

CRITICAL THINKING

The foundation.

- Problem definition — asking the right question
- Data integrity — sources and their limits
- Sourcing & validation against primary sources
- Synthesis — building a defensible position

PRACTICAL AI LITERACY

The new layer.

- When to use AI — and when not to
- Tool selection — deliberate, not default
- Prompting — context, audience, format, iteration
- Ethics, privacy, and data flow

STILL DO IT WITHOUT AI

The muscles to keep.

- Summarize a long document from notes
- Draft a clear paragraph from a blank page
- Build a basic spreadsheet model by hand
- Produce a defensible meeting recap

CLOSING THOUGHT

AI is the orchestra. The owner is still the conductor.

*The advantage goes to the most disciplined.
For a small business, AI is the most significant leverage point
I've seen in twenty-plus years of running one.*

Bryan D. Stafford • Fava Tea Company • May 2026

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