modus.

FREE GUIDE · AI 100 · PIECE 3 OF 12

Your ideal customer.

Five prompts. Three documents. One count. Start from your real best customers, work out what they are worth, and check the result against the last ten who paid you.



A STEP-BY-STEP PACK FOR OWNERS
ABOUT AN HOUR · NOTHING TO INSTALL · NOTHING TO PAY

MODUSAI.CA

TWO WAYS TO DO THIS

Two ways to do this.

You can just ask. "Help me define my ideal customer" gets you something. Usually it's a persona: an age, an income, someone who values quality. That describes a market. It doesn't tell you which customers make you money, and it doesn't tell the assistant what to write for them.

Or start from these. They begin with your actual best customers, by name, and ask why they're the best: what they buy, what you make on them, what they cost you in time. The description comes after, built from real people, and then gets checked against the last ten who paid you.

Use them as a floor. Add your own questions. If one doesn't fit your trade, skip it and say why in the document.

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HAVE THIS IN FRONT OF YOU FIRST

Have this in front of you first.

Your three to five best customers.
Your pick, your definition of best. You'll be asked why.

Rough numbers on them, if you have them.
What they spent last year, roughly what was left after materials and labour. Last year's invoices or your accounting software. Rough is fine, and "I don't know" is fine too.

Your last ten customers.
A job list, invoices, your calendar or your call log. Prompt 05 doesn't work without it, so get it now.

Your what-you-refuse.md from piece 2,
if you did it. Prompt 04 builds on it.

RUNNING ORDER

Prompts 01 to 03 in one sitting, about 40 minutes. They build one document. Take a break. Then prompts 04 and 05, about 20 minutes. Prompt 05 is the one that tells you something.

BEFORE YOU NAME A CUSTOMER

Set up the account first.

This is the first piece in the series that uses real customers by name. That's allowed and it's useful, but only on the right account, and only with what's already public.

Use a business account where your conversations aren't used to train the model. **Claude, ChatGPT, Gemini and Copilot all work for this, set up properly:** a business plan, or training turned off in the settings. Check it before you start, not after.

> **If security is your biggest concern, go with Copilot.** Signed in with your Microsoft 365 work account, what you type stays under your company's Microsoft agreement and isn't used for training. For a business already on Microsoft, it's the tightest setup of the four.

Which plan does what, side by side: **modusai.ca/en/resources/choosing-ai**. If you're on a free personal account, fix that before you go further.

FINE TO USE	KEEP OUT
A business customer's name and website	A person's full name, home address, phone or email
What they do publicly, where they work, how big they look	Their contracts, or anything you signed to keep private
Your own numbers about them: what they spent, your rough margin, how often they come back	Their banking, their logins, anything that would let someone act as them
For a household customer: a first name or the street, and what the job was	For a household customer: a name the assistant could look up

Why businesses and households are different.

A company's name and website are its public face. Naming one is like pointing at its truck. A homeowner's name belongs to a person, and being findable online doesn't change that.

One more thing.

What you say about a customer, like "pays late" or "good margin", is your note, not public information. On a properly set-up business account, that's fine. Anywhere else, that's the part to leave out.

BEFORE YOU NAME A CUSTOMER

Your documents, and your signatures.

Where your documents live.

The AI provider decides where it keeps your conversations, and nobody can promise that on its behalf. What you control is your own files. Keep the documents you build here in cloud storage located in the country where your business operates, and keep a backup.

PRO TIP · NDAS

If you've signed a non-disclosure agreement with a customer, run it past the AI before you name them. Paste the NDA into your business account and ask:

> List everything this agreement says I can't share, with whom, and for how long. Quote the clauses.

Then keep to it. The AI gives you a first read, not a legal opinion, and if the NDA says no, the answer is no.

Check your privacy settings every time you switch tools or plans. When you're not sure, talk to a professional who understands both the legal side and how these tools actually handle your data.

More on this: modusai.ca/en/resources/how-much-to-tell-ai — what actually costs something, and what to do if you've already pasted.

PROMPT 00

The rules every prompt starts with.

Every prompt in this pack already contains this block, so you can paste any one of them on its own. It's printed here once so you know why each line is there.

```
You are going to interview me to build one document about my business. I am the owner. I am not going to fill in a form:
you ask, I answer out loud, you write.

Rules for this interview:
- One question at a time. Wait for my answer before the next one. Never send me a list of questions.
- If my answer is vague, push once. If I say "good people" or "they're easy", ask me for the last specific thing that
happened. Take the second answer, not the first.
- Do not compliment me. No "great answer", no summarising my answer back approvingly. Ask the next question.
- Do not invent anything. If I don't know something, write UNKNOWN and who to ask or where to check. A gap I can see is
worth more than a number you made up.
- Rough numbers are fine. Label them. If I say "maybe 30%", write "~30% (owner's estimate)". Never turn a guess into a
figure.
- Write in my words. Keep my phrasing and my slang. Do not upgrade it into business English.
- Only the details that decide fit. Size, sector, region, age, income: only if I say it changes whether someone is a
good customer.
- No personal details about individuals. If I give you a homeowner's full name, address or phone number, don't use it,
and remind me to keep it out.
- Ask me anything else you need. These questions are the floor, not the ceiling.

When we're done, give me the finished document in markdown (plain text with headings) that I can save as a .md file.
Then list what's missing and what I should verify.
```

Why "do not compliment me". Left alone, an AI interview turns into flattery. It praises every answer, you feel good, and the follow-up that would have got the real answer never gets asked.

Why "rough numbers, labelled". Most owners don't know their margin per customer, and that's normal. What matters is that a guess stays marked as a guess, so the document never passes one off as fact.

PROMPT 01 · TIME : ABOUT 15 MINUTES

Your best customers

Real names, and what actually happened with each one. The description comes later. First, the people it has to be built from.

```
You are going to interview me to build one document about my business. I am the owner. I am not going to fill in a form: you ask, I answer out loud, you write.

Rules for this interview:
- One question at a time. Wait for my answer before the next one. Never send me a list of questions.
- If my answer is vague, push once. If I say "good people" or "they're easy", ask me for the last specific thing that happened. Take the second answer, not the first.
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- Write in my words. Keep my phrasing and my slang. Do not upgrade it into business English.
- Only the details that decide fit. Size, sector, region, age, income: only if I say it changes whether someone is a good customer.
- No personal details about individuals. If I give you a homeowner's full name, address or phone number, don't use it, and remind me to keep it out.
- Ask me anything else you need. These questions are the floor, not the ceiling.

When we're done, give me the finished document in markdown (plain text with headings) that I can save as a .md file. Then list what's missing and what I should verify.

We're starting a document called ideal-customer.md. First I'll name my three to five best customers. For business customers I'll give you the name and website. For household customers, a first name or the street.

For each one, ask me, one question at a time:
1. Why did you put this one on the list? What made you think of them first?
2. What have they bought from you? List the jobs or services, roughly in order.
3. How long have they been a customer? How did the first job come in?
4. What did they need the first time, and what was going on for them when they called?
5. What's the best job you've done for them? What made it good, for them and for you?
6. Has anything gone wrong with them? What did they do about it?
7. Are they still a customer? If they stopped, why?

After all of them: if I gave you websites and you can browse, read each one and tell me in three lines what that business does, how big it looks, and where it works. Mark it "from their website" with today's date. If you can't browse, say so and skip it.
```

Document : **ideal-customer.md** (starts)

PROMPT 02 · TIME : ABOUT 15 MINUTES

What they're worth

The economics of your best customers. This is what separates an ideal customer from a pleasant one.

```
You are going to interview me to build one document about my business. I am the owner. I am not going to fill in a form:
you ask, I answer out loud, you write.

Rules for this interview:
- One question at a time. Wait for my answer before the next one. Never send me a list of questions.
- If my answer is vague, push once. If I say "good people" or "they're easy", ask me for the last specific thing that
happened. Take the second answer, not the first.
- Do not compliment me. No "great answer", no summarising my answer back approvingly. Ask the next question.
- Do not invent anything. If I don't know something, write UNKNOWN and who to ask or where to check. A gap I can see is
worth more than a number you made up.
- Rough numbers are fine. Label them. If I say "maybe 30%", write "~30% (owner's estimate)". Never turn a guess into a
figure.
- Write in my words. Keep my phrasing and my slang. Do not upgrade it into business English.
- Only the details that decide fit. Size, sector, region, age, income: only if I say it changes whether someone is a
good customer.
- No personal details about individuals. If I give you a homeowner's full name, address or phone number, don't use it,
and remind me to keep it out.
- Ask me anything else you need. These questions are the floor, not the ceiling.

When we're done, give me the finished document in markdown (plain text with headings) that I can save as a .md file.
Then list what's missing and what I should verify.

Same customers. Now I want to know what each one is actually worth to the business. I may not know the numbers. Rough is
fine. Unknown is fine.

For each one, ask me, one question at a time:
1. What did they spend with me in the last twelve months, roughly? And over the whole time they've been a customer?
2. What's left on their work after materials and labour? A percentage, or better than average, average, or worse. If I
don't know, help me estimate it on one recent job: what it billed, the hours, the materials.
3. How often do they come back? Once a year, every season, whenever something breaks, never?
4. How do they pay? On time, after a reminder, after three?
5. What do they cost me that doesn't show on the invoice? Quotes that go nowhere, callbacks, hand-holding, changes
halfway through, calls at night.
6. Who have they sent me? Did those turn into good customers too?
7. If they left tomorrow, what would I lose? The revenue, work I like, reputation, referrals. Which one hurts most?

Then rank them by what they're worth to the business, everything counted, not just what they spend. Show me the order
and ask whether I agree. If my gut ranking and the numbers disagree, name the customer, say why, and let me decide.
```

What to watch for. Most owners pick "best" by who's pleasant, who's big, or who's been around longest. The ranking puts margin, repeat business and time cost next to that pick. If your favourite ends up third, that's worth knowing.

Document : **ideal-customer.md** (continues)

PROMPT 03 · TIME : ABOUT 10 MINUTES

What they have in common

Turn the best customers into a description an assistant can write for, and find the moment they need you.

```
You are going to interview me to build one document about my business. I am the owner. I am not going to fill in a form:
you ask, I answer out loud, you write.

Rules for this interview:
- One question at a time. Wait for my answer before the next one. Never send me a list of questions.
- If my answer is vague, push once. If I say "good people" or "they're easy", ask me for the last specific thing that
happened. Take the second answer, not the first.
- Do not compliment me. No "great answer", no summarising my answer back approvingly. Ask the next question.
- Do not invent anything. If I don't know something, write UNKNOWN and who to ask or where to check. A gap I can see is
worth more than a number you made up.
- Rough numbers are fine. Label them. If I say "maybe 30%", write "~30% (owner's estimate)". Never turn a guess into a
figure.
- Write in my words. Keep my phrasing and my slang. Do not upgrade it into business English.
- Only the details that decide fit. Size, sector, region, age, income: only if I say it changes whether someone is a
good customer.
- No personal details about individuals. If I give you a homeowner's full name, address or phone number, don't use it,
and remind me to keep it out.
- Ask me anything else you need. These questions are the floor, not the ceiling.

When we're done, give me the finished document in markdown (plain text with headings) that I can save as a .md file.
Then list what's missing and what I should verify.

Using what we've gathered on my best customers, find what they have in common. Suggest it first, then interview me to
correct it.

Suggest, in a short list:
- what kind of customer they are: business or household, and if business, the sector, size and region, only where it
repeats
- what situation they were in when they first needed me
- what they buy, and what they come back for
- what makes them worth more than average

Then ask me, one question at a time:
1. Which of those is wrong, or true of only one of them?
2. What do they have in common that doesn't show in any of this, something about how they run things or how they treat
me?
3. When one of them goes looking for someone like me, what's happening in their week?
4. What are they worried about when they call? Price, the job going wrong, me not showing up, not knowing the right
words?
5. What do they actually say in the first thirty seconds? Their words, not a summary.
6. What did they try before calling me?
7. Where would I find more of them? Where do they already buy, hang out, or ask for recommendations?

Write ideal-customer.md, dated on its first line, in this order:
1. Who they are, one paragraph, in my words
2. Why they're worth it, with every number marked known or estimate
3. The moment they need me: situation, worries, what they say (quoted), what they tried first
4. Where to find more of them
5. The best customers behind this, one line each, with the ranking
6. What's still unknown
```

> The question that matters most is what they actually say on the phone. Those are the words the assistant will use when it writes to the next one. The numbers decide who to write for. The words decide how.

Document : **ideal-customer.md** (finishes)

PROMPT 04 · TIME : ABOUT 10 MINUTES

Who you're not for

The customers who cost you, and how to spot them on the first call.

```
You are going to interview me to build one document about my business. I am the owner. I am not going to fill in a form: you ask, I answer out loud, you write.

Rules for this interview:
- One question at a time. Wait for my answer before the next one. Never send me a list of questions.
- If my answer is vague, push once. If I say "good people" or "they're easy", ask me for the last specific thing that happened. Take the second answer, not the first.
- Do not compliment me. No "great answer", no summarising my answer back approvingly. Ask the next question.
- Do not invent anything. If I don't know something, write UNKNOWN and who to ask or where to check. A gap I can see is worth more than a number you made up.
- Rough numbers are fine. Label them. If I say "maybe 30%", write "~30% (owner's estimate)". Never turn a guess into a figure.
- Write in my words. Keep my phrasing and my slang. Do not upgrade it into business English.
- Only the details that decide fit. Size, sector, region, age, income: only if I say it changes whether someone is a good customer.
- No personal details about individuals. If I give you a homeowner's full name, address or phone number, don't use it, and remind me to keep it out.
- Ask me anything else you need. These questions are the floor, not the ceiling.

When we're done, give me the finished document in markdown (plain text with headings) that I can save as a .md file. Then list what's missing and what I should verify.

This document is not-for.md: the customers I don't want, or should send somewhere else. It's about customers, not jobs. If I start listing work I refuse, stop me and tell me that belongs in my what-you-refuse.md document.

Ask me, one question at a time:
1. Tell me about the last customer you regret taking. What happened, and what did it cost you: money, time, a crew's week?
2. Looking back, what was the tell on the first call?
3. Which customers look good on the invoice and lose you money once you count the callbacks, the changes and the chasing?
4. Who do you send somewhere else, and where?
5. Who would you still turn down at double the price?
6. What kind of customer do you keep saying yes to even though you know better? Why: cash flow, a slow month, not wanting to say no?
7. Is there a customer you'd be embarrassed to be associated with?

Then, for every item on the list, ask me: "Has one of these come through in the last six months? Did you take them?" If I took them, it's a habit, not a rule. Write it down as one.

Write not-for.md, dated on its first line. Rules above a line, each with what it costs and the tell to listen for on the first call. Habits below the line, each with the reason I still say yes. Where I send people. No real names in this document: describe the type, not the customer.
```

> Why no names here, when prompt 01 used them. Your best-customers list is built from public information and it's a compliment. This one is a judgment about someone, and it's the document most likely to get forwarded or read by a new hire. Types, not people.

Document : **not-for.md** (builds)

PROMPT 05 · TIME : ABOUT 10 MINUTES

The last ten

Check the description against who actually paid you. One count, the same afternoon.

```
You are going to interview me to build one document about my business. I am the owner. I am not going to fill in a form:
you ask, I answer out loud, you write.

Rules for this interview:
- One question at a time. Wait for my answer before the next one. Never send me a list of questions.
- If my answer is vague, push once. If I say "good people" or "they're easy", ask me for the last specific thing that
happened. Take the second answer, not the first.
- Do not compliment me. No "great answer", no summarising my answer back approvingly. Ask the next question.
- Do not invent anything. If I don't know something, write UNKNOWN and who to ask or where to check. A gap I can see is
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- Write in my words. Keep my phrasing and my slang. Do not upgrade it into business English.
- Only the details that decide fit. Size, sector, region, age, income: only if I say it changes whether someone is a
good customer.
- No personal details about individuals. If I give you a homeowner's full name, address or phone number, don't use it,
and remind me to keep it out.
- Ask me anything else you need. These questions are the floor, not the ceiling.

When we're done, give me the finished document in markdown (plain text with headings) that I can save as a .md file.
Then list what's missing and what I should verify.

I'm giving you my last ten customers (business name, or first name or street for households) and the two documents we
just made, ideal-customer.md and not-for.md. This document is last-ten.md.

For each customer, ask me only what you need to place them, then mark them:
- FIT: matches ideal-customer.md
- NOT: matches something in not-for.md, rule or habit
- UNSURE: neither document decides it

If I know it, note what each one billed, and whether the margin was better, average or worse. If I don't know, leave it
blank. Don't guess.

Don't decide the close ones for me. Ask, and take my answer. If I say "they're fine" for everyone, push once: which of
these would I take ten more of?

When all ten are placed:
1. At the top, write: FIT x / NOT y / UNSURE z, out of 10.
2. If I gave you billing, write what share of the ten's revenue came from the FIT ones, and label it if any numbers were
estimates.
3. For the NOT ones: what do they have in common? Was it the customer, or was it me saying yes?
4. For the UNSURE ones: what's missing from the two documents that would have decided them? List it as questions for me.
5. One short paragraph: does the customer in ideal-customer.md match who's actually paying me? Quote my own words where
they don't line up.

Don't soften the count, and don't tell me what to do about it. I decide.
```

Document : **last-ten.md** (builds)

PROMPT 05

What the count is telling you.

Most of the ten fit.

Good. The customer you described is real, and now it's written down where any assistant can read it.

Most of the ten don't fit.

One of two things. Either you described the customer you wish you had, or you've been taking whoever calls. The count looks the same either way. Look at the NOT ones before you decide which.

Most are unsure.

Your two documents are too vague to sort anyone. That's the most fixable result of the three. Go back to prompt 03 with the questions the assistant listed.

> If you gave billing, look at the second number too. Three FIT customers out of ten bringing in most of the revenue is a very different business from three bringing in a sliver of it.

THREE THINGS THE ASSISTANT WON'T DO

Three things the assistant won't do.

It works from your numbers

If the margin on a customer is a gut feeling, the ranking is a gut feeling with a table around it. Every estimate is labelled so you can see which ones the whole thing rests on.

It can't tell you which to change

If six of ten don't fit, maybe you described someone who isn't out there in enough numbers, or maybe you said yes to everyone in a slow month. The count is the same either way. Which one is true is a call about your business.

It won't say your favourite is the wrong one

Sometimes the customer you like best is the one you make the least on, and the one paying the bills is on your not-for list. The ranking will show it. The assistant won't press you on it.

> That part takes a person who has seen more than one shop's numbers and has no reason to flatter you. The tool didn't fail. Those three things were never its job.

KEEP THEM TOGETHER

Keep them together.

These three documents go into the same folder as the six from piece 2. Build it the way it's laid out below, even the folders that are still empty. Every piece of AI 100 fills one. Piece 11 adds the index that ties them together. After that, the workflows and tools you build on top of your business (AI 101 and 102) read from this folder instead of asking you the same questions again.

```
my-business/
  README.md                ← piece 11: the index
  01-your-week/            ← piece 1
  02-who-you-are/          ← piece 2
    company-card.md
    story-and-why.md
    what-you-refuse.md
    what-you-sell.md
    how-you-talk.md
    your-proof.md
  03-customers/            ← piece 3
    ideal-customer.md
    not-for.md
    last-ten.md
  04-offer/
  05-market/
  06-team/
  07-what-you-have/
  08-ai-rules/
  09-measurement/
  10-ai-committee/
  workflows/               ← AI 101 and 102 build here
```

Why markdown (.md).
It's a plain text file with headings. It opens in Notepad, Word or Google Docs, and it's the format AI tools read best. When you later hand this folder to an assistant or build a workflow on it, the headings are how it finds things.

Date every file on its first line. When something in your business changes, update the document and the date. An old document an assistant trusts is worse than no document.

Run prompt 05 again in three months with your next ten customers. If the count moves, something you changed is working.

Next in AI 100: piece 4, Your offer. What you sell, in one line, run against a scorecard.

modus.

You can do all of this yourself. Some would rather it just got done.

AI 100 is free, and nothing is held back for a paid version. What Modus sells is the time, and the person whose job it is.

Rather have us do it?

Book a call. Scan the code or click the link.

modusai.ca/en/#contact

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