modus.

FREE GUIDE · AI 100 · PIECE 6 OF 12

Who does what.

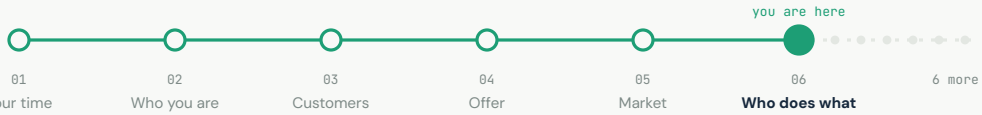
Four prompts. Two documents. One count. The roles your business runs on, which ones have a say in the calls that matter, which ones talk to your customers, and what stops the week one person is away.

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

MODUSAI.CA

WHY THIS PIECE

Roles first. Then the people in them.



Why it exists

Where your time goes, Who you are, Your ideal customer, Your offer and Your market wrote down your week, your business, your customer, your price and your market. All of it came out of one head: yours.

This piece is about the roles your business runs on. Someone quotes, someone schedules, someone does the work, someone sends the invoice. Good businesses are built on a handful of roles like that, each with a job to do. You can have great people and still have a problem: when a role is built around a person, the day they leave it can't be filled. So you write down the roles first, and fit the people in after.

Then two questions about every role. Does it have a say in the calls that matter? And does it talk to your customers? Side by side, the answers show who hears your customers and never gets asked.

Why not just ask AI

You can. Ask it to map your team and you'll get an org chart: boxes, names, who reports to whom. It describes the people you have. It doesn't tell you which roles the business needs, which one decided what went in the last quote, or whether the role that heard the customer complain was asked before anyone decided what to do about it.

What you'll have afterwards

Two documents. Who does what: the roles your business runs on, what each one does in any given week, who fills it today, which decisions it has a say in, and one count: how many of the roles that face your customers have no say in any of them. And the roles only one person can fill, with what happens the week that person is away.

Later, it's the file you reach for whenever who-does-what changes: when you hire, you hire for a role that's written down, not to replace a person. When AI writes something a customer will read, it knows who they'll deal with. When someone's off for a month, half the handover is already written.

How to come to it

About an hour and a quarter. Think about a normal week, not just the last one. You're not grading anyone: you're writing down the roles and how they run now. If it's just you, it still works: you hold every role, the people you rely on outside the payroll go on the list, and the second document is the part worth the time.

TWO WAYS TO DO THIS

Two ways to do this.

You can just ask. "Map out my team" gets you an org chart: boxes, names and lines, and probably a paragraph on delegation. It describes the people you have today. None of it tells you what roles the business needs to run.

Or start from these. They start with the roles, whoever fills them, and check each one against a typical week. Then they walk eleven everyday decisions and ask which role was actually in on the last one. Then, separately, which roles talk to your customers. Side by side, the two answers give you the count.

Use them as a floor. Add your own questions. If one doesn't fit your business, 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 calendar or job list for the last month.
It's how you check what a typical week really looks like, and where the decisions you'll be asked about happened.

Your phone.
Calls and texts show which role a customer actually reached, and when.

Everyone who did work for the business in the last three months,
on the payroll or not. Family counts. The bookkeeper counts. The sub you call every week counts. You'll fit them into roles, not the other way around.

Any job descriptions you already have,
written down or in an old job posting. If there aren't any, that's normal: you'll describe each role out loud.

RUNNING ORDER

Prompts 01 and 02 together, about 45 minutes: the roles, then the decisions. Then 03, the count, about 10 minutes. Then 04, the week someone's away, about 15. 03 gives you the number.

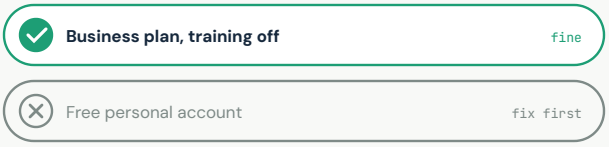


BEFORE YOU NAME ANYONE

Set up the account first.

This piece is mostly about roles, but the people who fill them come up too. In a shop of three, a first name identifies someone as surely as a full name does. That's allowed, but only on the right account, and only with what you'd say in front of them.

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: Choosing your AI. If you're on a free personal account, fix that before you go further.

FINE TO USE	KEEP OUT
A role ("quoting", "on the books", "the drywall sub") and who fills it, by first name	Last names, phone numbers, addresses
What the role is for, and what it does in a typical week	How well the person in it does it: reviews, warnings, anything said behind a closed door
What the role is responsible for, and which decisions it's part of	Pay, hours, contract terms
Whether the role talks to customers, and about what	Health, family, why someone is off
That only one person has a login	The login itself, or any password or code

Roles first. People after.

Wherever it doesn't matter who, use the role. "Scheduling" is enough for the assistant. It doesn't need to know it's Sylvie, and when Sylvie moves on, the line is still true.

The one test. Write every line as if the person it's about will read it. In a shop this size, they will.

TWO QUESTIONS, NEVER ONE

Which role has a say. Which role hears the customer.

Every role gets asked two separate questions, and neither answer is allowed to fill in the other. A title doesn't answer either one. "Office manager" doesn't tell you whether that role was asked before the last quote went out, or whether it talks to customers.

POSITION	WHAT IT MEANS, FOR ONE DECISION
Decides	Makes the call. If it goes wrong, it's theirs.
Is consulted	Gets asked before the call, and their answer can change it. Only if you can name the last time it happened.
Coordinates	Receives the call and moves it through the shop: tells the crew, books it, orders it, follows up.
Executes	Does the work the call produced.

And separately: does the role face customers?

Yes or no, from the last time it happened. A call, a text, a visit, an invoice, a complaint. If you can't name one in the last month, the answer is no, whatever the title says.

> This is not an org chart. Nobody is above or below anybody in these documents. It's a list of roles, a table of decisions, and which roles talk to customers. If you catch yourself drawing boxes, go back to the last decision.

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.

More on this: 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.

Also, for this piece:
- Roles first, people second. Write down the role, then who fills it today. If I describe a person, ask me what the role
is.
- People by role or first name only. No last names, contact details, pay, hours, health, family, performance, or why
anyone is away: that's HR, so stop me if I start.
- Check each role against the work in a typical week, never the person against the role. Don't rewrite descriptions:
write down the gap.
- Two separate questions: which role has a say in a decision, and which role talks to customers. Never work out one from
the other.
- No org chart: no boxes, no "who reports to whom", no ranking. If I start, bring me back to the decision.
- Don't judge: not who should decide, not who's overloaded, not what to delegate, not which jobs AI could do. Never
write a password or a login into the file.

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 "roles first, people second". You can have great people and still be stuck: if a role is built around one person, the day they leave nobody can be hired into it. Writing the role down first is what lets you fill it again. Whether someone does their job well is a different conversation, and it doesn't belong in a file an assistant reads.

Why "don't judge". Ask an assistant about your team and within two answers it will tell you to delegate. It has never worked in your shop. The prompts take that job away from it and leave it the one it's good at: writing down what you say, and keeping the two questions apart.

PROMPT 01 · TIME : ABOUT 25 MINUTES

The roles

The roles your business runs on, whoever fills them. What each one is for, what it actually does in a typical week, and who fills it today.




```
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.

Also, for this piece:
- Roles first, people second. Write down the role, then who fills it today. If I describe a person, ask me what the role is.
- People by role or first name only. No last names, contact details, pay, hours, health, family, performance, or why anyone is away: that's HR, so stop me if I start.
- Check each role against the work in a typical week, never the person against the role. Don't rewrite descriptions: write down the gap.
- Two separate questions: which role has a say in a decision, and which role talks to customers. Never work out one from the other.
- No org chart: no boxes, no "who reports to whom", no ranking. If I start, bring me back to the decision.
- Don't judge: not who should decide, not who's overloaded, not what to delegate, not which jobs AI could do. Never write a password or a login into the file.

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 who-does-what.md. First, the roles this business runs on: the jobs that have to get done whoever does them. Quoting, scheduling, doing the work, buying, invoicing, answering the phone. Ask me what's missing, one at a time, until the list is complete.

Then, for each role, who fills it today: a role name or a first name, on the payroll or not (family, a bookkeeper, a sub, the supplier who sets my week). One person can fill several roles. If it's all me, write that.

Then, for each role, one at a time:
1. What is this role for? I'll paste a job description or posting if there is one. If not, I'll describe it as I would to someone I'm hiring for it.
2. In a typical week, what does this role actually spend its time on? Use last week as a check: was it typical? If not, ask me what a normal week looks like.
3. Take the description line by line: when did this role last do it? Nothing in the last month: is it still the role, or just what we wrote down once? Mark it "in practice" or "on paper only".
4. What does the role do in a typical week that isn't in the description? Mark each one "not written down".
5. The role-or-person test: if the person in it left, could I hire for this role from the description? Or does the role only exist because of what this person happens to be good at? Mark it "role" or "built around a person".
6. What is the role responsible for: when it goes wrong, who gets the call?
7. Does this role talk to customers? When last, and about what? Nothing in the last month: mark it "doesn't".

Line 2 of the document: Roles as described vs as done: matches a · partly b · doesn't match c · nothing written d · built around a person e (today's date). Ask me before you place any role in the last four.
One row per role with all of the above, and who fills it. Leave a "decides or is consulted" column empty for the next prompt.
```

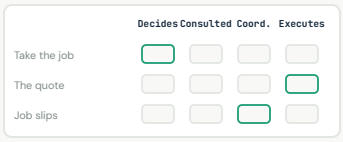
> Roles before people. A business that scales is built on roles. If a role only exists because of the person in it, the day they leave it can't be filled.

Document : **who-does-what.md** (starts)

PROMPT 02 · TIME : ABOUT 20 MINUTES

Who decides what

The everyday decisions, and which role sits where on each one. Not how it's supposed to work: the last time it actually happened.




```
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.

Also, for this piece:
- Roles first, people second. Write down the role, then who fills it today. If I describe a person, ask me what the role is.
- People by role or first name only. No last names, contact details, pay, hours, health, family, performance, or why anyone is away: that's HR, so stop me if I start.
- Check each role against the work in a typical week, never the person against the role. Don't rewrite descriptions: write down the gap.
- Two separate questions: which role has a say in a decision, and which role talks to customers. Never work out one from the other.
- No org chart: no boxes, no "who reports to whom", no ranking. If I start, bring me back to the decision.
- Don't judge: not who should decide, not who's overloaded, not what to delegate, not which jobs AI could do. Never write a password or a login into the file.

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 document. Now the decisions. We place roles on each decision, with the person in brackets.

Four positions per decision. Use these exactly:
- Decides: makes the call. If it goes wrong, it's theirs.
- Is consulted: gets asked before the call, and their answer can change it.
- Coordinates: receives the call and moves it through the shop (tells the crew, books it, orders, follows up).
- Executes: does the work the call produced.

Read me these one at a time. I'll cross out what doesn't happen here and add what does:
1. Whether we take a job or a customer · 2. What goes in a quote, and the number · 3. Who does which job, and when · 4. What we buy, and from whom · 5. Who we hire, or which sub we call · 6. What we tell a customer when a job slips · 7. How a complaint gets settled · 8. When we chase an unpaid invoice · 9. What we say about ourselves in public · 10. Changing how a job gets done · 11. Starting to use a new tool, app or software

For each one, ask about the last time it happened: who made the call, who did they ask first and did it change anything, who passed it on, who did the work.

Honesty check on Is consulted: for any role I put there, ask me to name the last time I asked it before this decision. If I can't, it goes in Coordinates or Executes. If I say "we decide together", ask who had the last word.

Output: a table with decision, decides, is consulted, coordinates, executes, and when it last happened. Then fill each role's "decides or is consulted" column, or write "none".
```

> Why the last time and not the usual way. Asked how a decision works, every owner describes the version where he consults people. Asked about the last quote, he names who was actually there.

Document : **who-does-what.md** (continues)

PROMPT 03 · TIME : ABOUT 10 MINUTES

The count

The two columns side by side: which roles talk to your customers, and which have a say. This is the prompt that gives you the number.




```
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.

Also, for this piece:
- Roles first, people second. Write down the role, then who fills it today. If I describe a person, ask me what the role is.
- People by role or first name only. No last names, contact details, pay, hours, health, family, performance, or why anyone is away: that's HR, so stop me if I start.
- Check each role against the work in a typical week, never the person against the role. Don't rewrite descriptions: write down the gap.
- Two separate questions: which role has a say in a decision, and which role talks to customers. Never work out one from the other.
- No org chart: no boxes, no "who reports to whom", no ranking. If I start, bring me back to the decision.
- Don't judge: not who should decide, not who's overloaded, not what to delegate, not which jobs AI could do. Never write a password or a login into the file.

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 document. Now read the two columns against each other. Don't merge them.

1. List every role marked as facing customers, mine included.
2. For each, check the decisions table: does it Decide, or is it consulted, on at least one decision? Coordinating and executing don't count: the coordinator gets the call after it's made.
3. Write line 1 of the document: Roles that face customers: x (mine included) · Of those, no say in any decision: y (today's date).
4. For each of the y, ask me, one at a time:
   - What did a customer tell the person in this role in the last month? Their words if I have them, labelled (they told me) or (my guess). If I don't know, write UNKNOWN: ask [role or first name]. Don't guess.
   - Did any of it reach me before a decision in the table was made? Which one?
5. One line for the other side: which roles decide or are consulted, and never talk to customers.
6. If y is 0, say which it is: every role that faces customers has a say, or mine is the only one that faces them.

Don't comment on the count. Don't tell me who should decide, or that any role should be added to anything. List what's there and stop.
```

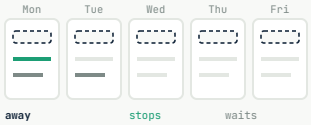
> The lines that matter most are the UNKNOWN ones. Each is a question with a name on it, and you can ask it Monday morning.

Document : **who-does-what.md** (finishes)

PROMPT 04 · TIME : ABOUT 15 MINUTES

The week someone's away

The roles only one person can fill, and what happens the week that person isn't there. If it's just you, this is the half of the piece that matters most.




```
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- Write in my words. Keep my phrasing and my slang. Do not upgrade it into business English.
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- Two separate questions: which role has a say in a decision, and which role talks to customers. Never work out one from the other.
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- Don't judge: not who should decide, not who's overloaded, not what to delegate, not which jobs AI could do. Never write a password or a login into the file.

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.

New document: single-points.md. Start from who-does-what.md: every role, who fills it, and every role marked "built around a person". Then ask me, one at a time:
- Which roles have only one person who can fill them?
- What does the person in each of those roles know that isn't in the role? A customer relationship, a supplier contact, a login. Tell me who, never the password.
- What do I do that I've never shown anyone?
- Who outside the business is the only one who can do something for us?

For each one, ask me:
1. Who else could fill it tomorrow, even badly? If someone could, take it off the list.
2. The week that person is away: what stops the first day, what waits until they're back, and what goes wrong that a customer would see?
3. Has it happened? When was that person last away a full week, and what actually happened? If never, write "never tested".
4. Where does it live: "their head" or "written down"? One word.

Line 1 of the document: Roles only one person can fill: z · Of those, only me: w · Built around a person: e · Never tested: v (today's date)

Don't write why anyone would be away. Don't propose a backup, a training plan or a fix. List it and stop.
```

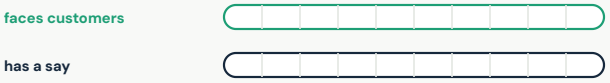
> If everything is you, most lines say "only me", and that's the document. The first time it gets tested shouldn't be the week you're sick.

Document : **single-points.md** (builds)

PROMPT 03

What the count is telling you.

Line 1 counts the roles that face your customers, then how many of them have no say in any of the decisions you listed.



Several roles face customers and have no say.

The document lists, for each one, what customers have been telling the person in it, or an UNKNOWN with their name on it. It doesn't tell you to change who decides. A shop where the owner decides is a normal shop.

Zero, because every role that faces customers has a say.

Then what those roles hear has a way into the decisions. The document shows which decisions, and when that last happened.

Zero, because yours is the only role that faces customers.

Then the count is short and honest, and single-points.md is the document that carries this piece.

> Then look at line 2. Every "on paper only", every "not written down" and every "built around a person" is a gap between the role as written and the role as it runs. This piece doesn't close them. A later piece in AI 100 does.

THREE THINGS THE ASSISTANT WON'T DO

Three things the assistant won't do.



It can't tell you whether the right role decides

The table shows which role made the call on the last quote. Whether that's the right one depends on who carries it when it goes wrong, who's ready, and who you trust. A shop where the owner decides everything is a normal shop.



It doesn't know what your customers say to your people

It only knows what you tell it. The UNKNOWN lines are the questions only they can answer, and they're the most useful lines in the document.



It can't tell you whether a single point is a risk

At three people, some roles will always have one person in them. Whether to cover one is a call about money and time, and the assistant is told not to make it.

> Those three were never its job.

KEEP THEM TOGETHER

Keep them together.

These two documents go in 06-team/, in the same folder as everything from Who you are, Your ideal customer, Your offer and Your market. Every piece of AI 100 fills one subfolder. The file, near the end of the series, adds the index that ties them together.

```
my-business/
  README.md                ← The file: the index
  01-your-week/            ← Where your time goes
  02-who-you-are/          ← Who you are
  03-customers/            ← Your ideal customer
  04-offer/                ← Your offer
  05-market/               ← Your market
  06-team/                 ← Who does what
    who-does-what.md
    single-points.md
  07-accounts/             ← Who controls your accounts
  ...
  workflows/               ← AI 101 and 102 build here
```

Both stay in the folder.

They name people you work with. Don't paste them into anything public. who-does-what.md goes to any assistant writing something a customer will read, so it knows which role they'll actually be dealing with.

Date both files on their first line. Roles shift every season. A map without a date is a map you can't trust.

> The count comes back later in the series, when the question is which roles should be in the room when the business decides what to do with AI.

Next in AI 100: Who controls your business accounts? A map of every account your business runs on: who owns each one, who can get in, and who could get in if you couldn't.

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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