modus.

FREE GUIDE · AI 100 · PIECE 9 OF 12

What each role is for

A short page for every role in your business, yours included. You write it, hand it over, and find out how they read it.

WHY THIS PIECE

Everybody's busy. In which direction?



Nobody wrote it down

Nobody really knows what their job is. They're all working, running in a bunch of different directions. And you're frustrated, because you expected them to do it the way you would, and you never actually said how.

That isn't a people problem yet. Nobody wrote it down.

Why not copy one

There's a job description for every role on the internet, and a different opinion on each. A role that works well somewhere else isn't automatically right for you. Your culture, your customers, the kind of work you do, what you sell: those are the parts that make the job yours, and no template has them.

What this guide does

You write down what each role is for, yours included. You hand it to the person. They tell you what they think it says. Where they read it differently than you meant it, you rewrite it.

What it isn't

It isn't a performance review, and it doesn't touch pay, hours or contracts. It's about the role, not how well someone fills it. Anything legal goes to a lawyer or an HR advisor (page 6).

How to come to it

It's piece 9 of AI 100. Who does what found the gap between the job on paper and the job as it's done, and wrote it down. This one closes it.

TWO WAYS TO DO THIS

Two ways to do this.

You can just ask. "Write me a job description for a salesperson" gets you one in seconds. It's right in general and wrong for you: it doesn't know your customers, your culture or what you sell. And it lists everything, which is exactly how you end up hearing "that's not my job".

Or start from these. You say everything the role does, out loud. The assistant pushes you to cut it down to six parts, checks every expectation, and plays the person in the role to test it. Then you hand it over and listen.

Use them as a floor. If a question doesn't apply to your business, skip it.

CONTENTS

02	Why this piece	02
04	Have this in front of you first	04
05	Check what you're on	05
06	Not a review. Not HR or legal advice	06
07	The rules every prompt starts with	07
08	Prompt 01 · Get it all out	08
09	Prompt 02 · Cut it down, then test it	09
10	Prompt 03 · Your own	10
11	Prompt 04 · Hand it over, then listen	11
12	One expectation, two ways	12
13	Family, friends and subs	13
14	What the assistant can't do here	14
15	Keep them together	15

HAVE THIS IN FRONT OF YOU FIRST

Have this in front of you first.

who-does-what.md, if you have it.

From Who does what. Each person's three lists (in practice, on paper only, not written down) are where prompt 01 starts. The decisions table feeds part 4.

our-accounts.md.

From Who controls your accounts, for part 2: what each role has to work with.

Pieces 2 and 4.

Who you are and Your offer, for what each role is ultimately working toward.

Voice input.

Your phone's, or the assistant's. Prompt 01 goes faster out loud.

RUNNING ORDER

Prompts 01 and 02 for one role, about 45 minutes. Start with the one you'd most like to hand off to. Repeat for each role. Then 03, your own. Then 04, once per person. If it's just you, do 03: it's the page you'll hand your first hire.

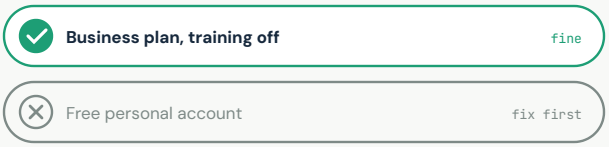


BEFORE YOU START

Check what you're on.

Paying for it isn't the same as a business account. On a personal plan, even a paid one, what you type can be used to train the model unless you turn that off in the settings. Business plans aren't used for training by default. A lot of owners think the monthly fee bought them that. It didn't.

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. This guide assumes everyone on the team is on an account the business chose.



> **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, vendor by vendor: Choosing your AI. This guide talks about sensitive things, so talk about them by kind, not by example:

FINE TO USE	KEEP OUT OF THE CHAT
Roles, and first names as in the earlier pieces	Full names, addresses, anything personal about the person
What the role delivers	How well the current person does it
"This ties to how you're paid"	Salaries, rates, bonuses
"The contract with our sub" as a thing that exists	What the contract says

Write about the role. Never about the person.

Every line, as if the person in the role will read it. They will.

Next page: what this guide doesn't do, and the six parts. Read it before prompt 01.

WHAT THIS GUIDE DOESN'T DO

Not a review. Not HR or legal advice.

This guide helps you say what a role is for. It doesn't judge the person in it, and it doesn't cover what the law says about work. The prompts tell the assistant to stay out of both.



Not HR or legal advice

Hours, pay, benefits, contracts, termination, who counts as an employee and who doesn't: none of that is in here. Every time one of those questions comes up, it goes under For the lawyer, as a question, and the assistant doesn't answer it.

> **If it ties to pay.** For a salesperson or a sub, what they deliver can be tied to how they're paid. The document can say so in one line. The pay itself is between you and them.

Not a review

Whether the person is the right one for the role is a different conversation. This is about what the role is for. If a lot of people miss the same expectation, look at the expectation first. Whoever manages the people in the role checks that every quarter.

The six parts

What this role is for. What you have to work with. What you deliver. What you decide. What you can expect from me. Where to find more.

Two tests

Could someone outside your trade read it and get the job? Does every expectation have a way to check it, without the list being so complete that "it's not on the list" becomes an answer?

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:
- We're writing what a role is for, not judging the person in it. If I start talking about how well someone does the
job, bring me back to the role.
- Never suggest an expectation, a standard job description, or what this kind of role usually does. Ask me and write
what I say.
- Never suggest a target, a frequency or a deadline. If I don't give one, write UNKNOWN.
- Nothing about pay, hours, benefits or contract terms. If I bring it up, write "ties to how they're paid" at most.
You're not my lawyer or my HR advisor: anything that sounds legal goes under For the lawyer, as I asked it.
- Write every line as if the person in the role will read it, because they will.
- Stay in this piece. Who decides what is piece 6, the tools and accounts are piece 7. Whether people are meeting
expectations goes to whoever manages them. Read those files if I paste them, don't rebuild them.

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 "never suggest an expectation". An assistant asked what a salesperson should do will tell you, and it will sound sure. It's describing someone else's business. Yours is the one that matters.
>
> Why "as if they'll read it". Because they will. A line you'd be uncomfortable reading out to the person is a line about them, not about the role.

PROMPT 01 · TIME: ABOUT 20 MINUTES PER ROLE

Get it all out

One role at a time. Talk it through out loud: everything the role does, everything you expect. Don't tidy. If you tidy as you go, you'll forget things.



```
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:
- We're writing what a role is for, not judging the person in it. If I start talking about how well someone does the job, bring me back to the role.
- Never suggest an expectation, a standard job description, or what this kind of role usually does. Ask me and write what I say.
- Never suggest a target, a frequency or a deadline. If I don't give one, write UNKNOWN.
- Nothing about pay, hours, benefits or contract terms. If I bring it up, write "ties to how they're paid" at most. You're not my lawyer or my HR advisor: anything that sounds legal goes under For the lawyer, as I asked it.
- Write every line as if the person in the role will read it, because they will.
- Stay in this piece. Who decides what is piece 6, the tools and accounts are piece 7. Whether people are meeting expectations goes to whoever manages them. Read those files if I paste them, don't rebuild them.

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 roles/[role].md for one role. Ask me which.

If I've pasted who-does-what.md, start from this role's three lists: in practice, on paper only, not written down. Read them back to me one line at a time and ask: still part of this job?

Then let me talk. Ask me to tell you everything this role does and everything I expect from it, in any order. Don't organise it, don't shorten it, don't correct me. When I stop, ask "What else?" Keep asking until I say there's nothing.

Then three I'd skip:
- What does this role do that only shows up when it's missing?
- What do I expect that I've never actually said out loud?
- What do I do myself because I never handed it over?

Output: the full raw list, in my words, numbered. No headings yet.
```

> Voice works best here. Dictate into the assistant, or into your phone and paste it. Cutting comes next, and it's easier than remembering.

Document: **roles/[role].md** (starts)

PROMPT 02 · TIME: ABOUT 25 MINUTES

Cut it down, then test it

Six parts, simplified until someone outside your trade would get it. Then two checks on every expectation, and the assistant plays the person in the role.




```
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:
- We're writing what a role is for, not judging the person in it. If I start talking about how well someone does the job, bring
me back to the role.
- Never suggest an expectation, a standard job description, or what this kind of role usually does. Ask me and write what I say.
- Never suggest a target, a frequency or a deadline. If I don't give one, write UNKNOWN.
- Nothing about pay, hours, benefits or contract terms. If I bring it up, write "ties to how they're paid" at most. You're not my
lawyer or my HR advisor: anything that sounds legal goes under For the lawyer, as I asked it.
- Write every line as if the person in the role will read it, because they will.
- Stay in this piece. Who decides what is piece 6, the tools and accounts are piece 7. Whether people are meeting expectations
goes to whoever manages them. Read those files if I paste them, don't rebuild them.

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.

Take the raw list from prompt 01. Sort it with me into six parts:
1. What this role is for: one or two sentences. If I've pasted pieces 2 or 4, use them to remind me what the business is working
toward.
2. What you have to work with: tools, accounts, people. If I've pasted our-accounts.md, point to it.
3. What you deliver: outcomes, not tasks. If an item is a task, ask me what it's for and write the outcome.
4. What you decide: from piece 6's decisions table, if I have it.
5. What you can expect from me: ask me what I'll give this person, how they reach me, how fast I answer, what I'll never do to
them. Push once if I'm vague.
6. Where to find more: for each expectation, a file, a person or a document. If there isn't one, UNKNOWN.

Then simplify. Ask me, line by line: can this be shorter? Can two lines be one? Does it need writing down at all? Do it again.
Stop when I say it's as short as it gets.

Then two checks on every expectation:
- How would we both know it's done? If neither of us could check it, ask me to rewrite it.
- Could the number be hit while the real job isn't done? If yes, ask me what makes a result count, and write that in.

Then read parts 1 and 3 back as if to someone who's never worked in my trade, and ask me if they'd get it.

Then be the person in this role. Ask me five "is this my job?" questions about situations the document doesn't cover. After each,
ask: should the document say it, or is this where I use my judgment? If it's judgment, don't add a line.

Output: roles/[role].md, six parts, one page. Review date at the bottom, three months from today. Under it: For the lawyer.
```

> Stop short of listing everything. The day something isn't on the list, someone will say "that's not my job". Leave room for your judgment.

Document: **roles/[role].md** (finishes)

PROMPT 03 · TIME: ABOUT 30 MINUTES

Your own

The owner's role is a role too, and usually the least written down. The same six parts, then four more: what you're good at, what you're not, what you should handle, what you should hand off.

> *"If they're never given the opportunity to, they'll never step up."*
>
> NICK, MODUS

```
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:
- We're writing what a role is for, not judging the person in it. If I start talking about how well someone does the job, bring me back to the role.
- Never suggest an expectation, a standard job description, or what this kind of role usually does. Ask me and write what I say.
- Never suggest a target, a frequency or a deadline. If I don't give one, write UNKNOWN.
- Nothing about pay, hours, benefits or contract terms. If I bring it up, write "ties to how they're paid" at most. You're not my lawyer or my HR advisor: anything that sounds legal goes under For the lawyer, as I asked it.
- Write every line as if the person in the role will read it, because they will.
- Stay in this piece. Who decides what is piece 6, the tools and accounts are piece 7. Whether people are meeting expectations goes to whoever manages them. Read those files if I paste them, don't rebuild them.

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.

Now roles/owner.md. Same as prompts 01 and 02, but for my job. Then four more parts, one question at a time, and push once on each:
7. What I'm good at.
8. What I'm not good at. If I say "nothing", ask what I put off.
9. What I should handle. Only me, and why.
10. What I should hand off. For each, to which role, or "no one yet".

Part 5, what you can expect from me, is written for the whole team.

For every item in part 10, ask me: does that role's document say it's theirs now? If not, write it under Update, with the role's name.

Output: roles/owner.md, then the Update list.
```

It's the hardest one, and the one that lets you delegate. If you never write down what you should hand off, nobody gets the chance to take it.

Document: **roles/owner.md** (builds)

PROMPT 04 · TIME: 5 MINUTES, THEN THE CONVERSATION

Hand it over, then listen

You write it for them, not with them. Then they tell you, in their own words, what they think it says. Where they read it differently, the document changes.

> *"Ultimately it's not up to you whether it makes sense or not. It's up to them."*
>
> NICK, MODUS

```
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:
- We're writing what a role is for, not judging the person in it. If I start talking about how well someone does the job, bring
me back to the role.
- Never suggest an expectation, a standard job description, or what this kind of role usually does. Ask me and write what I say.
- Never suggest a target, a frequency or a deadline. If I don't give one, write UNKNOWN.
- Nothing about pay, hours, benefits or contract terms. If I bring it up, write "ties to how they're paid" at most. You're not my
lawyer or my HR advisor: anything that sounds legal goes under For the lawyer, as I asked it.
- Write every line as if the person in the role will read it, because they will.
- Stay in this piece. Who decides what is piece 6, the tools and accounts are piece 7. Whether people are meeting expectations
goes to whoever manages them. Read those files if I paste them, don't rebuild them.

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.

Use roles/[role].md to write me a short plan for handing it to the person in the role. Plain, in my words.
1. Hand it over. I give them the page and say: read it, sit with it for a few days, then we'll talk. Nothing's decided until
we've talked.
2. The conversation. One question per expectation: "In your words, what does this one mean?" Then: "Why do you think it's there?"
Add a line for me: don't explain it first. Listen.
3. Their questions: "What's missing? What's unclear? What would you need from me?"

After the conversation I'll paste my notes. Then:
- In explain-back.md, mark each expectation "as meant" or "read differently", with what they said, in their words.
- For every "read differently", ask me how to rewrite the line. Don't rewrite it for me. Then update roles/[role].md.
- Count their questions.
- Line 1 of explain-back.md:
Explained back the way I meant: x of y expectations · roles with a document: a of b · questions asked: q (today's date)

Don't comment on the count. Write it and stop.
```

Every miss is a line to rewrite, not a person to fix. And every time you do this, the next document gets better.

Document: **explain-back.md** (builds)

ONE EXPECTATION, TWO WAYS

When the measurement becomes the method.

A salesperson's job is building a pipeline and closing it. Here's one expectation, written two ways.

TOO TIGHT

~~**Make 20 calls a day.**~~

Twenty calls to people who can't buy anything still counts. So does an internal call.

WITH ROOM LEFT IN

On the phone or in front of customers 80% of your 40-hour week.

Top accounts: a call every two weeks. Next group: once a month. The rest: every two months.

Customer-service requests go to the right team. Phone before email.

The 80% and the cadence by group can both be checked. What happens on each call is left to judgment. The numbers are an example: yours come from your business.

And one that went wrong

A sales team was paid on demos booked. At a trade-show booth, anyone who signed up for a demo got a $100 backpack.

The demos got booked. Most were with people who didn't decide anything, weren't interested, or had nothing to do with the product. The business spent a small fortune on backpacks.

> **The number wasn't too big. It never said what made a demo count.**

FAMILY, FRIENDS AND SUBS

Where it matters most.

Hiring your spouse, your brother-in-law, a friend: normal, and a lot of small businesses do it. It's also where a written role matters most.

> *“If it's not clear, that's how you get fights at the dinner table.”*
>
> NICK, MODUS

Family and friends

The document is how work stays work, and the relationship stays the relationship. Write it before the first day, not after the first argument.

Subs

Same six parts, maybe more needed, especially through a firm: you both need to know what to expect. If it ties to how they're paid, say so in one line.

Just you

Write owner.md. When you hire, you'll know which half of it you're handing over.

> Same rule for all three: write about the role, as if they'll read it.

WHAT THE ASSISTANT CAN'T DO HERE

What the assistant can't do here.



It can't tell you what a role should be

It asks and writes. Your business decides what the job is.



It can't tell you if the person is the right one

This is about the role. Who fills it is your call.

§

It can't answer the legal questions

Hours, pay, contracts, who's an employee. It writes them down for a lawyer or an HR advisor.

> And it can't tell you how they understood it. Only they can. That's prompt 04.

KEEP THEM TOGETHER

Keep them together.

These documents go in 09-roles/, with everything from the earlier pieces, like Who does what and What goes into AI.

```
my-business/
  README.md                ← The file: the index
  01-your-week/            ← Where your time goes
  ...
  06-team/                 ← Who does what
  07-accounts/             ← Who controls your accounts
  08-what-goes-in/         ← What goes into AI
  09-roles/                ← What each role is for
    owner.md
    [role].md
    explain-back.md
  ...
  workflows/               ← AI 101 and 102 build here
```

Each role's page goes to the person.

And into the onboarding folder. When an assistant writes something for your team, a job posting or a training note, it reads from here.

Date every document and look at them again at three months, then at least once a year when you look at where the business is going.

> If a lot of people miss the same expectation, the expectation is probably wrong before the people are. Whoever manages the people in that role runs that check, every quarter.

This is a lot of work.

Follow these steps and you'll likely end up with something much better than what you have now. But writing roles that hold up takes experience more than anything. If you want this to really work, talk to us.

modusai.ca/en/#contact

Next in AI 100: Your AI Circle of Excellence.

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. Roles that hold up take experience: Nick has over a decade of managing teams. If you want this to really work, talk to us.

Rather have us do it?

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

modusai.ca/en/#contact

1 877 654-1877