modus.

FREE GUIDE · AI 100 · PIECE 10 OF 12

Your AI Circle of Excellence

Three roles, a 12-month plan, a number on every part of it, and an hour a month to check. Plus a free PowerPoint to run it from.

A STEP-BY-STEP PACK FOR OWNERS
A PLANNING SESSION, THEN ONE HOUR A MONTH · POWERPOINT TEMPLATE INCLUDED · NOTHING TO PAY

MODUSAI.CA

WHY THIS PIECE

Who's deciding what AI does in your business?



It's already in the business

Somebody on your team found a new AI tool last week. Somebody else is paying for two that do the same thing. Nobody's sure whether either one is doing anything for the business, and nobody's sure who gets to decide.

What happens without it

Tools pile up. Money goes out with nothing to show for it, because nobody wrote down a starting number. People get pulled off their actual job to try things nobody asked for. Customer and business information goes into tools nobody approved. And a job gets handed to AI, then someone has to be paid to watch the AI.

Bigger companies are learning this already. In a 2026 survey of US HR managers, a third of the organizations that cut staff on the promise of AI savings had to hire people back (Orgvue, March 2026).

Why not just you

Because the question isn't why you can't run this alone. It's why your business can't run without you. If you hold every decision, you can't grow past yourself, sell, hand the business down, or take two weeks off. This is one place to start letting go, on a subject where the people closest to the work know more than you do about which tools actually help.

What this guide does

You set up a small group, three roles, that decides what your business does with AI. Together you write a 12-month plan, put an owner and a number on every part of it, and check it once a month. It's piece 10 of AI 100. Pieces 1 to 9 wrote your business down. This one decides what you'll do with it.

TWO WAYS TO DO THIS

Two ways to do this.

You can just ask. "Write me an AI strategy for my business" gets you one in seconds. It sounds good and it's nobody's: no owner, no numbers, nothing your team agreed to. Six months later nobody remembers it.

Or start from these. The circle sits down together. The prompts make you say what AI is for, put a number and an owner on every part of it, and check it every month. The free PowerPoint is what goes on the screen.

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

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HAVE THIS IN FRONT OF YOU FIRST

Have this in front of you first.

open-and-closed.md, if you have it.

From What goes into AI. Every use your team agreed to already has an outcome and a number: your plan starts from them. The rows under For the meeting go to the circle.

who-does-what.md.

From Who does what, to pick who holds each role.

Your role documents, if you've written them.

From What each role is for.

Any number you already measured.

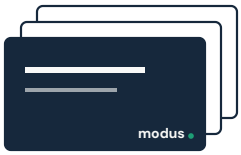
Your week (piece 1), what you give away (piece 4), your last ten quotes (piece 5).

The PowerPoint template.

AI-Circle-of-Excellence.pptx, free with this pack: click to download. Prompt 05 fills it for you.

RUNNING ORDER

01 on your own (20 minutes). 02 and 03 at the planning session, with the circle (a few hours). 05 once, to fill the PowerPoint. Then 04 every month, an hour at most. On your own? Page 14 first.

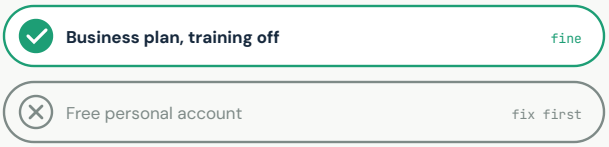


BEFORE YOU START

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, anything personal
Your objectives and the numbers you watch	How well a person is doing their job
"This ties to a budget"	Salaries, bonuses, bank details, passwords
The name of a tool you're trying	Logins, licence keys, anything that gets into an account

Plan the work. Never judge the people.

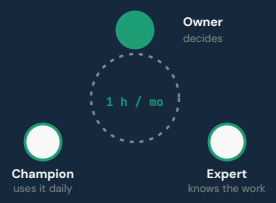
A missed objective gets a why, not a who. Whether someone's doing their job goes to whoever manages them.

Next page: the three roles, and what only you decide. Read it before prompt 01.

THE CIRCLE

Three roles, not three people.

The owner decides. The AI champion uses it every day. The domain expert knows the work. In a small shop, one person can hold two.



The owner

The decision maker. Always in it. In a business with departments, each department head sits in for theirs, and you keep the final say.

The AI champion

Uses the tools all the time, wants to test the next one, shows the team how and pushes people to try things.

The domain expert

Knows the work. In a roofing company, the person who knows roofing. The bigger you are, the narrower it gets: the expert in the sales process, the one who runs the office.

WHAT ONLY YOU DECIDE

You write the list. Anything that could hurt the brand, the money or the integrity of the business belongs on it: a full rebrand, a major financial decision. Anything you've already handed to someone to run, they own. Everything not on the list, the circle decides.

When it meets

A planning session once a year, a few hours or an off-site. A check-in every month, an hour at most. Weekly check-ins only for a project that needs them.

What the circle doesn't do

It checks the plan, not the people. Whether someone's doing their job goes to whoever manages them.

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:
- Never suggest an objective, a number, a target, a deadline or what "good" looks like. Ask me and write what I say. If
I don't have one, write UNKNOWN.
- If something we want to do can't get a number, it doesn't go in the plan. Put it under Not run yet: no number, with
what's missing.
- Never tell me what other businesses do or achieve.
- We're planning the work, not judging people. If the talk turns to how well someone does their job, stop me: that goes
to whoever manages them.
- You are not my lawyer or my accountant. Anything that sounds legal or financial goes under For the lawyer or For the
accountant, as I asked it.
- Stay in this piece. What goes into AI is piece 8, roles are piece 9. 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 a number". An assistant asked what a good target is will give you one, and it will sound sure. It's describing someone else's business. Your number comes from yours.

Why "not run yet" and not "drop it". An idea without a number isn't a bad idea. It's an idea nobody can check yet. It waits until someone can say how you'd know it worked.

PROMPT 01 · TIME: ABOUT 20 MINUTES, OWNER ALONE

The circle

Who holds each of the three roles, when the circle meets, and the list of things only you decide. Everything not on that list, the circle decides.




```
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:
- Never suggest an objective, a number, a target, a deadline or what "good" looks like. Ask me and write what I say. If I don't
have one, write UNKNOWN.
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- You are not my lawyer or my accountant. Anything that sounds legal or financial goes under For the lawyer or For the
accountant, as I asked it.
- Stay in this piece. What goes into AI is piece 8, roles are piece 9. 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 the-circle.md. There are three roles:
- The owner: the decision maker. That's me. With departments, ask whether each head sits in for theirs.
- The AI champion: whoever uses AI the most, likes testing new tools and pushes the others to try things.
- The domain expert: whoever knows the work best.

If I've pasted who-does-what.md, read me the roles one at a time and ask: champion? domain expert? One person can hold two roles;
write it. If I don't have a champion, write UNKNOWN and ask who's closest. If the file lists people who face customers with no
say in any decision, read me that line and ask if one of them belongs in the expert seat.

Then my "only me" list: what can't the circle decide without me? Ask three questions, one at a time:
1. What could hurt the brand?
2. What could hurt the money?
3. What could hurt the integrity of the business, the way we treat customers and people?
For each answer, ask: why only me? If I've handed that part of the business to someone, does it go to them instead? Two examples
to start me off, nothing more: a full rebrand, a major financial decision. Push once if the list is empty, once if it's
everything.
Under the list, write: Everything not on this list, the circle decides.

Then when we meet: the planning session (date, how long), the monthly check-in (an hour at most), and any project that needs its
own weekly check-in.

Output: the-circle.md, with For the lawyer and For the accountant at the bottom.
```

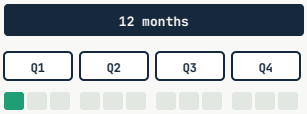
> You write the list, not the circle, because you answer for the brand, the money and the integrity of the business. Anything you've already handed to someone to run, they own.

Document: **the-circle.md** (builds)

PROMPT 02 · TIME: THE PLANNING SESSION, A FEW HOURS

The 12-month objective

With the whole circle in the room. Add it to your yearly strategy meeting, or take an afternoon off-site. What should AI have done for the business in 12 months?




```
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:
- Never suggest an objective, a number, a target, a deadline or what "good" looks like. Ask me and write what I say. If I don't have one, write UNKNOWN.
- If something we want to do can't get a number, it doesn't go in the plan. Put it under Not run yet: no number, with what's missing.
- Never tell me what other businesses do or achieve.
- We're planning the work, not judging people. If the talk turns to how well someone does their job, stop me: that goes to whoever manages them.
- You are not my lawyer or my accountant. Anything that sounds legal or financial goes under For the lawyer or For the accountant, as I asked it.
- Stay in this piece. What goes into AI is piece 8, roles are piece 9. 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 the-plan.md. The circle is here: [names and roles].

First, the horizon. Ask me: 12 months or 6? Tell me once that 12 is the right one, then write what I choose.

Then what we already have. If I've pasted open-and-closed.md, read me each agreed use with its outcome and its number, one at a time, and ask: still worth it? Does it belong in the plan? Then read me the rows under For the meeting and have the circle decide each one: open, ask first or never. Write those answers back into open-and-closed.md, not here. If I've pasted numbers from earlier pieces (my week, what I give away, my last ten quotes), read them to me as candidates.

Then the objective, in three rounds, one at a time:
1. The business: in [12 / 6] months, what should AI have done for how the business runs?
2. The work: what should be different about how the work gets done?
3. Customers: what should a customer notice?
Let each person answer. Don't merge their answers until we agree. Then have us write the objective in one or two sentences per area. If we can't say what it's for, it isn't an objective yet.

Output: the top of the-plan.md: the horizon, the objective in three areas, the date, and the uses from piece 8 we kept.
```

> Why 12 months. Less than that and every month is a fresh start. A year gives you something to break down, and something to check against at the end. If you can see further, write that down too.

Document: **the-plan.md** (starts)

PROMPT 03 · TIME: ABOUT AN HOUR, SAME SESSION

Break it down

Quarters, then months. An owner and a number on every one. Anything that can't get a number waits under "not run yet".




```
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:
- Never suggest an objective, a number, a target, a deadline or what "good" looks like. Ask me and write what I say. If I don't
have one, write UNKNOWN.
- If something we want to do can't get a number, it doesn't go in the plan. Put it under Not run yet: no number, with what's
missing.
- Never tell me what other businesses do or achieve.
- We're planning the work, not judging people. If the talk turns to how well someone does their job, stop me: that goes to
whoever manages them.
- You are not my lawyer or my accountant. Anything that sounds legal or financial goes under For the lawyer or For the
accountant, as I asked it.
- Stay in this piece. What goes into AI is piece 8, roles are piece 9. 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 objective at the top of the-plan.md. Break it down with us:
1. Quarters: what has to be true at the end of each one? One objective per area, at most.
2. Months: for each quarter, what gets done in each of its three months?

Then, on every objective, quarterly and monthly:
- Owner: who answers for it. Ask us. Tasks inside it can have their own owners.
- The number: how we'll know it's done. Countable. If we give you a feeling ("customers are happier"), ask once what we'd count,
and take the countable version.
- Today's value: what it is now. If we don't know, write UNKNOWN and where it would come from.
- When it's read: which check-in.

If an objective can't get a number, move it under Not run yet: no number, with what's missing. Don't drop it.

Then the count. Line 1 of the-plan.md:
With an owner and a number: x of y objectives · today's value known: z of y · circle: [roles], meets [when] (today's date)

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

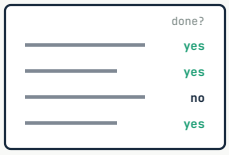
> If you can't put a number beside it, you don't run it. Not because the idea isn't worth doing. Because without a number you'll hurt yourself doing it: money and time spent, and no way to know whether any of it worked.

Document: **the-plan.md** (finishes)

PROMPT 04 · TIME: 5 MINUTES BEFORE, ONE HOUR AT MOST

The monthly check-in

Each owner presents their number. Done or not. If not, why: note it, learn from it, move on. Every third month, the quarter: we said we'd do these, are they done?




```
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:
- Never suggest an objective, a number, a target, a deadline or what "good" looks like. Ask me and write what I say. If I don't have one, write UNKNOWN.
- If something we want to do can't get a number, it doesn't go in the plan. Put it under Not run yet: no number, with what's missing.
- Never tell me what other businesses do or achieve.
- We're planning the work, not judging people. If the talk turns to how well someone does their job, stop me: that goes to whoever manages them.
- You are not my lawyer or my accountant. Anything that sounds legal or financial goes under For the lawyer or For the accountant, as I asked it.
- Stay in this piece. What goes into AI is piece 8, roles are piece 9. 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 the-plan.md and the last block of check-ins.md to write a one-page agenda for this month's check-in. An hour at most. Plain, in my words.
1. The numbers: each objective due this month, with its owner. The owner presents it. Done or not.
2. Not done: why. One line each. What we learned. What's next. No blame.
3. Piece 8's map: anything someone wants to move, add or ask about. The circle decides, unless it's on my "only me" list.
4. Anything new someone wants to try. It needs an outcome and a number before it's a yes.
5. If this is the last month of a quarter: we said we'd do these. Are they done? Yes or no, each one.

After the meeting I'll paste my notes. Then:
- Add a block to check-ins.md: date, who came, each number as its owner presented it, done or not, why, what we learned, what's next.
- Update open-and-closed.md with any move the circle made. Ask me before you move anything.
- Recount line 1 of the-plan.md.
- At the end of a quarter, add: Q[n] objectives done: a of b (date).

If my notes talk about whether a person is doing their job, leave it out and write: "goes to whoever manages them".
```

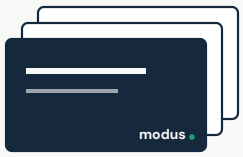
> A month that didn't go to plan isn't a failure. It's information. At the end of each quarter, look at what's left. At the end of the year, start the next 12 months from what this one taught you.

Document: **check-ins.md** (adds to)

PROMPT 05 · TIME: ABOUT 10 MINUTES, ONCE

Fill the template

The pack comes with a free PowerPoint to run the circle from. This prompt fills it from your files, so the first version is done before your first check-in.




```
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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- 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.
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- You are not my lawyer or my accountant. Anything that sounds legal or financial goes under For the lawyer or For the accountant, as I asked it.
- Stay in this piece. What goes into AI is piece 8, roles are piece 9. 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.

I've attached AI-Circle-of-Excellence.pptx, the-circle.md and the-plan.md. Fill the PowerPoint from the two files.

- Slide 1, mission: write one or two sentences from the objective at the top of the-plan.md: what AI is for in this business, and how we'll know it's working. Show me three versions and let me pick. Put the business name and today's date where the brackets are.
- Slide 2, roles: each person's name in the right card. Under "also handles", the objectives they own in the-plan.md.
- Slide 3, how we decide: my "only me" list, word for word, and the meeting schedule.
- Slide 4, the 12 months: the objective, the number, today's value and the owner for each of the three areas. The count at the top from line 1 of the-plan.md.
- Slide 5, the roadmap: each quarter's objective, owner and number, then each month.
- Slides 6 and 7, the check-ins: leave them blank. Put this quarter's objectives in the first column of slide 6 and this month's in slide 7.

Keep the layout, the colours and the fonts. Replace the text in the brackets; don't add text boxes, don't add slides. If something doesn't fit, shorten it and tell me what you cut.

Give me the filled .pptx to download. If you can't edit files, give me the text slide by slide, in order, so I can paste it in.
```

> Works in any assistant that can open and edit a PowerPoint file. If yours can't, the last line has it give you the text slide by slide, and you paste it in. Then put it on the screen at every check-in.

Document: **AI-Circle-of-Excellence.pptx** (fills)

ONE OBJECTIVE, BROKEN DOWN

From 12 months to this month.

A roofing company. The circle: the owner, the office manager (champion), the lead estimator (domain expert). An example: yours comes from your business.

12-MONTH OBJECTIVE · CUSTOMERS

Every quote request gets a written answer the same business day.

WHEN	OBJECTIVE	OWNER	THE NUMBER
Q1	Quote replies drafted with AI, checked by a person, sent the same day	Office manager	Share of quote requests answered the same business day. Today: UNKNOWN, count it from the inbox
Month 1	Count a month of quote requests and how long each one waited	Office manager	Requests counted: yes or no
Month 2	Write the 10 questions customers ask most; the AI drafts from them	Lead estimator	Questions written: 10 of 10
Month 3	Every reply drafted this way	Office manager	Same-day share, read at the check-in

> **And when month 3 misses.** The owner writes why: the estimator was on a roof all week and nobody checked the drafts. The circle decides what's next. The plan moves on.

Where it goes in the PowerPoint

SLIDE 4

The objective, the number and today's value go in the customers card. The office manager's name goes under owner.

SLIDE 5

The Q1 column: the quarter's objective, its owner and its number, then one line per month.

SLIDE 7

Each month, one row: the number the owner presents, done or not, and why not.

AT ONE, THREE, THIRTY PEOPLE

It scales up. It doesn't scale down to one.

Just you

You don't have a circle at one person. Build the business up first. But write the 12-month plan, prompts 02 and 03: you still need a game plan, and a number on every part of it. When you hire, the first person who fits a role gets a seat.

Three to ten

One circle. One person may hold two roles. The champion is often not the most senior person, and that's fine.

Bigger, with departments

A circle per key department: its head as owner, its own champion, its own expert. The business owner keeps the "only me" list for all of them.

Family and friends on the team

Same as piece 9: if the roles aren't clear, that's where the fights start. Write who holds which seat.

WHAT THE ASSISTANT CAN'T DO HERE

What the assistant can't do here.



It can't sit on the circle

It can lay out who decides what and how often. It can't decide.



It can't pick your objective

It asks and writes. What AI is for in your business is your call.



It can't tell you why a number moved

It can hold you to the number. Whether it moved because of the AI, the season or a new hire is for the circle to say, out loud, at the check-in.

> And it can't tell you whether someone's doing their job. That goes to whoever manages them.

KEEP THEM TOGETHER

Keep them together.

These documents go in 10-circle/, with everything from the earlier pieces, like What goes into AI and What each role is for.

```
my-business/
  README.md                ← The file: the index
  01-your-week/            ← Where your time goes
  ...
  08-what-goes-in/         ← What goes into AI
  09-roles/                ← What each role is for
  10-circle/               ← Your AI Circle of Excellence
    the-circle.md
    the-plan.md
    check-ins.md
    AI-Circle-of-Excellence.pptx
  ...
  workflows/               ← AI 101 and 102 build here
```

The PowerPoint goes on the screen.

The markdown files are what you paste into the assistant. Keep both current: after each check-in, paste your notes into prompt 04, then update the slide.

Date everything and look at the plan again at the end of every quarter, and start the next 12 months from what this year taught you.

> The circle keeps the map from piece 8 current: a row that needs to move comes to the check-in.

This is a lot.

A 12-month plan, numbers on everything, a meeting every month that actually happens. This is how large companies run it, and most small businesses never get there. We've built and sat on centres of excellence throughout our careers, for customers and inside companies, from enterprise to SMB. We can guide you through setting it up, and we can sit on your circle with you.

modusai.ca/en/#contact

Next in AI 100: The file. Everything from pieces 1 to 10, in the one document AI reads before it writes anything.

modus.

You can run all of this yourself. Some would rather have help at the table.

AI 100 is free, and nothing is held back for a paid version. Running a circle that actually meets, and a plan that actually gets measured, takes practice. If you want help setting it up, or someone at the table with you, talk to us.

Rather have us do it?

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

modusai.ca/en/#contact

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