modus.

FREE GUIDE · 02

Choose your AI without guessing.

You've used the free ChatGPT. This is what actually differs between these tools, what to check before you pay, and how to test one on your own work.

A DECISION GUIDE FOR OWNER-OPERATORS
ONE EVENING TO WORK THROUGH · TWO WEEKS TO BE SURE

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START HERE

What this is, and what you'll have at the end of it.

You've been told you need to be using AI. You tried the free ChatGPT, it did something impressive once, and then you closed the tab. The question you're left with — *which one should I actually pay for* — turns out to be the wrong question to start with, and that's most of why it's hard to answer.

This guide doesn't tell you which one to buy. It gives you the way to decide: how these tools actually differ once you look past the marketing, the seven things worth checking before you put a card down, and a two-week test that answers the question with your own work instead of somebody's demo. Nobody here is selling you anything: Modus is tied to no platform, and no vendor named in this guide has any relationship with us.

What you'll have when you're done

Your decision — one page

DECIDED 12 SEPT · REVIEW 12 MARCH

The job. First drafts of quotes and customer follow-ups, from my own notes. Costs me about four hours a week today.

The choice. The assistant already included in the suite we pay for, on work accounts — not the personal one on my phone. $0 extra for now.

The rules. No customer names, no employee matters, no contract figures. Nothing leaves the building without me reading it.

Who and when. Me and Marie. Nobody else until it's run a full quarter. Revisit in six months, or sooner if the price or the terms move.

Illustration of the output shape. Yours will name your work, your constraints, and your date.

What it costs

An evening to work through, and two weeks of running one real job. Possibly nothing in money — a lot of businesses are already paying for an assistant they've never turned on.

What it is not

Not a product review, and there's no scoreboard at the back. A ranking would be out of date before you finished reading it, and it isn't the part that decides anything.

THE HONEST PART

The brand matters less than three things you control: whether you named a job worth doing, whether you're on a work account or a personal one, and whether anyone still opens it in week three. Nearly every disappointment traces back to one of those — not to picking the wrong logo.

BEFORE YOU START

Three things that are true of all of them.

Before you compare anything, it helps to know what you're comparing. These assistants differ in real ways, but they are far more alike than the advertising suggests — and the three things they have in common will shape your experience more than anything that separates them.

01

They are confidently wrong sometimes

Not often. Reliably enough that it matters. Which is why the first job you hand one has to be work you can judge yourself, in a subject where you'd notice the error.

02

They know only what you gave them

None of them knows your prices, your customers, or how you run a job until you tell it — every time, or once in a place it reuses. Most "we tried AI and it didn't work" stories are this and nothing else.

03

One brand sells several products

"ChatGPT" is a free plan, several paid personal plans, and a business plan — and the rules about your data are not the same across them. Same for the other three. When someone tells you what a tool does, ask which plan they're on.

A fourth thing, less obvious and more useful: the gap between these tools is narrower than the gap between using one well and using one badly. An owner with a clear job and a saved paragraph about his business gets more out of a free tier than a competitor on the most expensive plan with no method.

The five steps

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STEP 01

Name the job. The tool comes second.

"Which AI should I get" has no answer, the same way "which truck should I buy" has no answer until somebody says what they're hauling. Name the work first and the shortlist gets short fast.

This isn't tidiness. Every question later in this guide — does it need the live web, does it need your files, does anyone else need access, does it matter where the data ends up — is answered by the job, not by the tool. Choose the job properly and you've already done most of the choosing.

What makes a good first job

THE TEST	WHY IT'S ON THE LIST
It happens every week	Something that comes up twice a year teaches you nothing in two weeks, and you'll have forgotten the tool exists by then.
It's made of words	Writing, rewriting, summarizing, sorting, explaining, translating. These are text engines. Anything running on your numbers, your schedule or your systems is a different project with a different answer.
You can judge it yourself	You need to tell good from bad at a glance. That rules out anything where you'd have to take its word for it.
Nothing breaks if it's wrong	First drafts, not final answers. Internal, not sent.
It costs you real time today	If it saves nothing measurable, you'll never know whether it worked — and you'll drop it the first busy week.

Jobs that work as a first test

- First drafts of quotes and proposals from your rough notes
- Turning a voice memo or a scrawled list into a written follow-up
- Rewriting the same explanation you give customers ten times a month
- Summarizing a long document you have to read anyway
- Drafting your own material in both languages, checked by a native speaker

Jobs to leave for later

- Anything touching your accounting, your scheduling, or your customer database
- Anything that would go to a customer without you reading it
- Anything you couldn't check if you wanted to
- Anything you'd describe as "improving how we operate" rather than "doing this thing on Tuesday"

> **THE HOURS TEST**
>
> Whatever job you name, ask: if this worked perfectly, how many hours a month does it give back? If you can't put a number on it, you've named a wish rather than a job. Under two hours a month is real, but it won't survive a busy week.

If you can't think of one, look at your week

Most owners can't name the job on demand, because the work that eats their time is the work they've stopped noticing. Three questions surface it faster than staring at a list:

- **What did you do twice this week that you'd be embarrassed to bill a customer for?** Retyping, reformatting, rewriting the same thing in different words.
- **What sits in your head until Sunday?** The quote you haven't written, the follow-up you owe, the summary somebody's waiting on. Not because it's hard — because starting it is.
- **What do you put off because of the blank page, not the thinking?** That distinction is the whole opportunity. These tools are very good at removing a blank page and very bad at removing a decision.

Write it down before you shop. One sentence, in your own words, on Worksheet 1 (p. 18). Everything from here on gets measured against that sentence — and if you skip it, you'll end up comparing feature lists, which is how people buy the wrong thing while feeling thorough.



Job named → options understood → checks run → tested → decided. Each step removes options you don't have to think about again.

One warning about advice you'll get

Somebody will tell you which one is best. They'll be sincere, and they may well be right — for the job *they* do. A developer, a marketer and a contractor use these tools for work that has almost nothing in common, and each of them ends up genuinely convinced about a different product.

The useful question to ask anyone recommending one isn't "which do you use." It's **"what do you use it for, and how would you know if you'd chosen wrong?"** The answers tell you whether their situation resembles yours. Usually it doesn't.

STEP 02

Know what you're choosing between. There are three layers, not one.

The question sounds like it's about four brands. It isn't. Three different kinds of thing all get called "AI," they cost wildly different amounts, and most businesses should try them in a particular order.

LAYER	WHAT IT IS	ROUGH COST	WHEN IT'S THE RIGHT ANSWER
1 — The AI already inside what you pay for	Your office suite — and increasingly your CRM, accounting software and phone system — has had AI features added, usually with no separate bill and often without anyone telling you.	Frequently $0 extra	**Almost always try this first.** Already bought, already inside your logins, already covered by an agreement you signed.
2 — A general assistant	ChatGPT, Claude, Gemini, Copilot. A blank box you point at any job made of words.	Roughly $20–30 per person per month at the common paid tiers; free tiers exist with real limits	When the job is words, changes shape week to week, and you want one thing that does many jobs rather than many that each do one.
3 — A tool built for one job	Transcription, receipt capture, quoting software for your trade, scheduling.	Varies enormously	When that one job is worth the price on its own — and you'd buy it even with no AI in it.

Layer 1 is the one everyone skips

Two examples, from the vendors' own documentation on 5 August 2026. Check them yourself before acting — this is the kind of fact that moves.

If you pay for Google Workspace

Google folded its Gemini features into Workspace Business and Enterprise plans in January 2025 and retired the separate add-ons, now "no longer available for purchase." On Business Standard or Plus, the assistant is inside the seat you already buy — Business Starter is shut out of several of them.

If you pay for Microsoft 365

Microsoft 365 Copilot Chat is available "at no extra cost" to work accounts on Business Basic, Standard and Premium. It answers from the web — Copilot working *inside* Word, Excel and Outlook on your files is the paid add-on. Two products, one name.

The point isn't that either is right for you. It's that a business paying for one of those suites may already own a work-account assistant with better data handling than the free chat window its staff use on their phones — and be paying twice to be worse off.

The order that saves money

01 **Turn on what you already own** and give it the job from Step 1 for two weeks. If you don't know what you own, ask whoever administers your email — or log in and look at the plan you're on.

02 **If it can't do the job, name what's missing** — in a sentence — and then add one general assistant, for one person. Not for the team. One person, one job.

03 **Only after both,** look at a tool built for one job. And judge it as software: does it do the work, what does it replace, what happens if the company folds. The AI in it is not the question.

> **WHY THIS ORDER AND NOT THE OTHER ONE**
>
> Running it backwards — buying the specialized tool first — is how small businesses end up with four subscriptions, three logins nobody remembers, and no clear idea which one is doing anything. Starting with what you already pay for costs nothing and answers the only question that matters early: does this kind of work belong in this kind of tool at all?

A word on free tiers

Free tiers are not demos. All four of the major assistants can search the live web on their free plan, and for a single person testing a single job, free is often enough to get a real answer. What free generally costs you is **capacity and control**: tighter usage limits, fewer files, no scheduling, no administrator, and — the part that matters most — data terms written for a consumer rather than a business. That last one is Question 1 on the next page, and it's the reason free is a fine way to test and a poor way to operate.

One thing worth knowing before you compare prices. Two of the four publish small-business pricing in Canadian dollars. The other two publish in US dollars, which means the real number on your statement includes the exchange rate and your card's foreign transaction fee. On a $20 seat that's not nothing, and it compounds by twelve.

STEP 03

The seven questions to ask before you pay.

These are the questions that actually separate one of these tools from another. They're ordered by how much it costs you to get them wrong. Every one can be answered from the vendor's own published pages in an afternoon — which almost nobody does, which is why so many businesses learn the answers later and by accident.

Question 1 — Whose account is it: yours, or the business's?

This is the one that surprises people, and the only one on the list that can turn into a legal problem rather than a wasted subscription.

All four vendors sell the same underlying assistant twice: once to you as a person, and once to your business. The screens look nearly identical. **The rules about what happens to what you type are not the same** — and on the personal side, three of the four may use your conversations to train their models unless you go and turn it off.

TOOL	ON A PERSONAL PLAN	ON A WORK OR BUSINESS PLAN
ChatGPT	"We may use your content to train our models" for its services for individuals. There is an off switch — Settings → Data Controls → *Improve the model for everyone*.	"By default, we do not train on any inputs or outputs from our products for business users."
Claude	Materials may be used "including training our models, unless you opt out of training through your account settings."	"By default, we will not use your inputs or outputs from our commercial products… to train our models."
Gemini	The *Keep Activity* setting "is on by default" for adults, and a subset of chats is read by human reviewers. Paying for a consumer AI plan does not change this.	Inside a Google Workspace account, Google commits "not to use customer data to train or fine-tune" its generative AI models "without our customer's prior permission or instruction."
Copilot	"Microsoft uses data from Bing, MSN, Copilot, and interactions with ads on Microsoft for AI training," with an opt-out available.	On a work account, "prompts and responses aren't used to train the underlying foundation models."

Quoted from each vendor's own published documentation, checked 5 August 2026. References on the back page. The terms will change; the questions won't.

Two things in there that cut against intuition

Paying more does not automatically mean better handling

On Claude's personal plans, allowing training *extends* how long your data is kept — from 30 days to five years, by the vendor's own account. On the consumer Gemini side, chats already sampled for human review are kept for up to three years and are **not removed when you delete your history**, because they've been disconnected from your account. Neither of these is buried or sinister. Both are published. Almost nobody reads them, and "we pay for it, so we're fine" is the belief that gets businesses caught.

The business version is often cheaper than you'd guess — sometimes free

See Step 2. If you already pay for a business suite, the work-account assistant may be included in what you're spending today. The upgrade that fixes this question is frequently an administrative change rather than a purchase.

> THE PRACTICAL RULE
>
> If anything about your actual business is going into it — a customer's name, a real quote, an employee matter, a supplier contract — it belongs on a business account, not the personal one you tried it on. If you're only testing with generic material, a free personal plan is perfectly reasonable. The mistake is drifting from one to the other without noticing you crossed a line.

Question 2 — Where does it go, and will they tell you?

Everything you type leaves your business and is processed on somebody else's computers, almost certainly outside Quebec. That isn't a scandal; it's how these work. The question worth asking is whether the vendor will *tell* you where it goes and who else touches it. Two things to look for, both usually one search away:

- **A named list of subprocessors.** Not "we use trusted cloud providers" — an actual list of companies, with what each one does. OpenAI, Google and Microsoft each publish one; Anthropic publishes one through its trust centre. A vendor who won't name them can't be assessed, and that is itself the finding.
- **A statement of where data is stored.** As of 5 August 2026, none of the four offers Canadian storage on an ordinary small-business plan. OpenAI lists Canada as an option for Enterprise and API customers, not for its Business plan. Anthropic stores data in the US and lists Canada as "coming 2026." Google Workspace lets you choose the United States or Europe, and only from Business Standard up. Microsoft is the exception — Canada is a supported region covering Microsoft 365 including Copilot on Business plans, though Microsoft also states that model processing "can call into other regions where capacity is available."

"Not disclosed" is an answer, not a dead end. If you can't find where the data goes or who processes it, you haven't failed to research — you've learned something specific about them. What that's worth depends entirely on what you'd put in.

Question 3 — What can it actually see?

Three separate capabilities that people assume are one thing:

- **The live web.** Can it look something up today, or is it working from what it memorized months ago? All four can search the web, including on their free tiers. One that can't will tell you about last year with total confidence.
- **Your files.** Can you hand it a document, and how many at once? This is where free tiers get capped. It's also where the built-in suite assistants differ most from each other: reading a PDF you uploaded is not the same as being able to see everything already sitting in your company's drive.
- **Your systems.** Connecting an assistant to your email, your calendar, your CRM. Genuinely useful, and a genuinely bigger decision — that's the point where you've stopped choosing a subscription and started changing how the business runs. It is not a first purchase.

Question 4 — Does it work where you already work?

The tool that gets used is the one that's already open. If your business runs its email, files and documents in one suite, the assistant built into that suite starts with an advantage no feature comparison will overturn — not because it's better, but because it's one fewer window and one fewer password, and people use what's in front of them.

Weigh that heavily, and weigh it against yourself if you're the technical one in the building. A slightly better assistant that only you ever open is worth less than a slightly worse one your whole shop uses.

Question 5 — Is the French good enough for the work you'd do in French?

All of them write French. They do not all write Quebec French, and none of them will tell you which is which. This is a five-minute test you have to run yourself, and it's the one place where your own judgment beats any published specification:

01 Take a real piece of your own French writing — a quote, a customer email, a notice to staff.

02 Give each candidate the same starting notes and ask for the same thing.

03 Read the results out loud. You'll know inside two sentences whether it sounds like somebody here wrote it or like something translated from English.

If it reads as European French or as translated English, you can usually fix it by saying so directly and giving it two samples of your own writing to match. If it can't be fixed, you've found a real difference between the candidates, in five minutes, for nothing.

> Do the same test on your trade's vocabulary. These tools have read a great deal of French and comparatively little of the French spoken on a job site in the Estrie. The word for a part, a permit, or a step in your process is where the seams show.

Question 6 — Who else needs it, and what happens when they leave?

On a personal plan, the account belongs to the person, not to you. Their conversations, their saved instructions, their history — when they leave the business, all of it leaves with them, and you have no way to see it, export it, or shut it off. You also have no way to know what went into it.

Business plans exist largely to fix that: an administrator who can add and remove people, see what exists, and export or delete it. For one owner testing one job, a personal plan is fine. The moment a second person is doing real work in it, that's the line.

IF THIS IS YOUR SITUATION	WHAT YOU ACTUALLY NEED
One owner, testing, generic material	A free or personal paid plan. Revisit when any of the three changes.
One owner, real business material	A business plan — mostly for the data terms in Question 1, not the features.
Two or more people, real work	A business plan with an administrator, and the two rules from Step 5 written down before anyone gets access.

Question 7 — What does it really cost, and what does it cost to leave?

The real monthly number

Per person, per month, times the number of people who would actually use it, times twelve. Add the exchange rate and your card's foreign transaction fee where the vendor prices in US dollars. Then check whether the attractive annual rate you were quoted commits you for a full year — most of them do, and that's fine as long as you knew.

The cost of leaving

Can you get your saved instructions and your history out? A year of accumulated context you can export is an asset. A year you can't is a reason you'll never switch — which is not the same thing as a reason to stay, though it will feel like one.

THE SEVEN, IN ONE LINE EACH

- **1.** Personal account or business account — and what that means for your data
- **2.** Where it goes, and whether they'll say
- **3.** What it can see: the web, your files, your systems
- **4.** Whether it lives where you already work
- **5.** Whether the French holds up on your work
- **6.** Who else needs it, and who owns it when they go
- **7.** The real annual number, and the cost of getting out

Worksheet 2 on p. 18 is these seven as a side-by-side scorecard for two candidates. Fill it in from the vendors' own pages, not from reviews.

STEP 04

Test it on your own work. Two weeks, one job, real inputs.

A demo tells you the tool can do something. It cannot tell you whether it does *your* thing, in your words, on your Tuesday. That answer costs two weeks and usually no money — every one of these has a free tier or a trial, and the job you named in Step 1 is the test.

The rules of a fair test

01 **Same job, same inputs, both candidates.** Use the real thing — the actual quote, the actual email, your actual messy notes. Not a cleaned-up version you prepared for it.

02 **Two candidates, maximum.** Three is how you end up finishing none of them.

03 **Give both the same paragraph about your business.** What you do, who you serve, how you talk. Ten minutes of context beats an hour of clever phrasing, on every one of these tools. Write it once, paste it into both.

04 **Count the minutes honestly.** How long the job took before, how long it took with the tool — *including the fixing.* The fixing is the part people leave out, and it's where the disappointment lives.

05 **Use it on the day the work actually happens.** A test run on a quiet Friday afternoon tells you how it performs on a quiet Friday afternoon.

What to score

THE QUESTION	WHAT A YES LOOKS LIKE
Did it save time once fixing is counted?	A number you'd say out loud to your partner. "Maybe" is a no.
Could I tell whether it was right?	You spotted its mistakes without hunting for them. If you couldn't tell, the job is wrong for this — not the tool.
Would I have sent it after one edit?	One edit is a win. Rewriting from scratch isn't a draft, it's a distraction wearing a draft's clothes.
Did I keep using it without deciding to?	Week two is the honest signal. Enthusiasm in week one means nothing at all.
Was the French right?	Where it applies — see Question 5. Judge it out loud, not on screen.

THE ONE HABIT TO END EVERY SESSION WITH

Whatever you had to fix, say so — and then ask it to **rewrite your saved instructions to include the fix, and show you the new version.** Save that version where the tool reuses it.

A correction typed into a chat window dies with that chat. This single habit is most of the difference between a tool that gets sharper every week and one that stays exactly as good as it was on day one, until you quietly stop opening it.

What two weeks looks like

WEEK	EXPECT	YOUR JOB
Days 1–3	Output that's structurally right and specifically wrong. Your tone missing. Details invented where you were vague.	Fix the paragraph about your business, not the request. Nine times in ten that's the problem.
Week 1	Usable drafts that still need real editing. You'll start noticing which parts it always gets wrong.	Name those parts out loud and fold them into the saved instructions.
Week 2	Either you reach for it without thinking, or you've stopped opening it. Both are answers.	Stop correcting. Count the minutes. Decide.

If both candidates fail, don't buy the less-bad one. Two honest possibilities: the job wasn't a good fit for this kind of tool, or the job was fine and you never gave either one enough context to do it. Re-read Step 1 and rule 03 above before you conclude anything about the products.

What the test won't tell you

Two weeks won't tell you whether the price will still make sense in a year, or whether the vendor will change its terms — and nothing will. That's not a reason to research harder. It's the reason Step 5 ends with a date in the calendar rather than a conclusion.

STEP 05

Decide, write it down, and set the two rules.

A decision nobody wrote down gets made again every few months, usually by whoever spoke most recently. One page ends that, and takes ten minutes.

The decision record — five lines

LINE	WHAT GOES IN IT
The job	The one from Step 1, in your words, with the hours it costs you today.
The choice	Which tool, on which plan, on whose account. The plan and the account type matter more than the brand — write all three.
What it costs	The real annual number from Question 7. Zero is a valid answer and worth recording.
Who has it	Names. Not "the office."
When we look again	A date. Six months is right for a first decision.

The two rules you set at the same time

1 — What never goes in

The short version: no customer or employee personal information, no contract figures, nothing you'd be uncomfortable seeing quoted back to you. Write the version that fits your business in one line, and say it out loud to everyone who gets access, on the day they get access.

2 — Who reads it before it leaves

Nothing generated goes to a customer, a supplier, or a government body without a person reading it first. That isn't distrust of the tool — it's the same rule you'd have for a new employee in their first month, for the same reason.

Those two lines *are* a policy — a small one, and enough for one or two people doing careful work. Once your team grows, or once customer information starts going anywhere near these tools, two lines stop being enough. In Quebec that becomes a real piece of work with real obligations behind it, which is the subject of the next page and of a later guide.

THEN PUT THE DATE IN THE CALENDAR

Six months out, with the decision record attached. Every fact in this guide has a shelf life — prices move, plans get renamed, terms are rewritten. The questions don't change. The answers do, and nobody is going to email you when they do.

TROUBLESHOOTING

Five ways this goes wrong, and what to do about each.

WHAT YOU'RE SEEING	WHAT'S ACTUALLY CAUSING IT	THE FIX
"We tried it and it wasn't that impressive"	No job was ever named, so it got tested on nothing in particular. An assistant with no job looks like a toy, because it's being used as one.	Back to Step 1. Name one job that costs you hours every week, and test only that.
"It doesn't know anything about our business"	It doesn't, and it won't until you tell it. Most people re-explain their business in every new chat and then conclude the thing has no memory.	Write the paragraph once. Save it where the tool reuses it — a project, custom instructions, a saved space. Ten minutes, one time.
"We bought seats for everyone and nobody uses them"	Buying came before proving. Getting a team to adopt something is a separate problem from choosing it, and a much harder one.	One person, one job, one month. Expand from something that visibly worked, never from a hope that it will.
"Somebody pasted a client's information into it"	Nobody was told not to, because nothing was written down. This is the most common real incident in a small business and it's almost never malice.	The two rules from Step 5, said out loud to everyone with access. In Quebec this is also a reportable kind of event — see the next page.
"It gave us something confidently wrong"	It will. All of them do, all the time, at a low but real rate.	This never goes to zero. It's why the first job has to be work you can check, and why nothing leaves the building unread.

THE OUTCOME THAT ISN'T A FAILURE

Deciding to buy nothing. If you work through this and conclude that nothing you do this month is worth thirty dollars a person, that's a real answer and often the correct one. You'll have learned what these tools do and don't do, which is worth having, and you'll recognize the job when it turns up. Come back then.

READ THIS PART

What Quebec law asks of you, and what it doesn't.

Nothing here requires you to hand over sensitive information, and the decision stays simple while that stays true. But the moment an AI tool touches customer or employee information, you take on obligations that don't depend on your size.

There is no small-business exemption

Quebec's private-sector privacy law applies to every person carrying on an enterprise here, with no headcount floor — a three-person shop carries the same duties as a three-hundred-person one. Among them: you may collect only what is necessary for a purpose set beforehand; you must have written governance practices for how personal information is handled; and someone must be formally responsible, with their title and contact information published.

Pasting the wrong thing into an AI tool is a confidentiality incident

Not a figure of speech — that's the term the law uses. If it presents a risk of serious injury you must promptly notify the Commission d'accès à l'information and the people affected, and keep a register of incidents. It's also the most likely way a small business first meets this law — which is why the "what never goes in" line is worth writing before you need it.

If a machine decides about a person, you have to say so

Where a decision about someone is based exclusively on automated processing, you must inform them and let them have a person review it. Keeping a human in the deciding seat — the tool drafts, you decide — keeps you out of that section entirely.

French is the language of work

Documents an employer makes available to staff — including the rules you set in Step 5 — have to be available in French. If your team works in French, whatever you choose has to as well. That's Question 5, with a legal reason on top of the practical one.

Not legal advice. This is an operations reading of published statutes, not a legal opinion. Whether a specific tool suits specific information deserves a proper answer: the vendor's terms for the plan you're actually on, and professional advice where the stakes justify it.

The honest ceiling on all of this

Choosing well gets you a good tool. It does not get you a better business. The hours in a small business rarely disappear into writing — they go into the quote that takes four days to leave, the invoicing that eats a Sunday, the thing only one person knows how to do. An assistant helps with the writing; it does nothing about the shape of the work. That isn't an argument against picking one — it's an argument for keeping the decision small and reversible.

You can only choose well between things you understand. That's just as true of everything else in how your business runs.

Working through this takes an evening and tells you something worth knowing: whether these tools do anything for you, on your work, at your prices. Most owners find the answer is yes for one or two jobs and no for the rest — which is the correct answer, and more than most businesses ever establish for themselves.

That's the work we do. Modus is an operations and AI consulting firm for founder-led businesses across Quebec. We look at how your business actually runs, find the manual work that's growing faster than your revenue, and apply automation only where the return is real. We won't sell you something you don't need.

Diagnostic Modus

A structured look at how your business runs — and where the hours are actually going.

Vendor-neutral, documented, and yours to keep whether or not you ever work with us again.

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WORKSHEET 01

The job.

One job. In your words. Everything else gets measured against this sentence.

The job I'd hand over first

How often it happens

Hours a month it costs today

How I'd know it worked

The five tests — check each one before you go further

WEEKLY	MADE OF WORDS	I CAN JUDGE IT	NOTHING BREAKS	COSTS REAL TIME

If one of these is a no, it's still worth trying — but expect the two-week test to be inconclusive, and know why before you start.

WORKSHEET 02

The seven checks, side by side.

Fill this in from the vendors' own pages, not from reviews. Write "not disclosed" where you can't find it — that's a finding.

QUESTION	CANDIDATE A	CANDIDATE B
1. Personal or business account? What do they say about training?		
2. Named subprocessors? Where is data stored?		
3. Live web · my files · my systems		
4. Does it live where we already work?		
5. French — read out loud, verdict		
6. Admin, and what happens when someone leaves		
7. Real annual cost · cost to leave		

WORKSHEET 03

Two-week test log.

One row per real use. The two minute columns are the whole point — fill them in the same day, not from memory.

DATE	TOOL	WHAT I ASKED IT TO DO	MIN. BEFORE	MIN. WITH	WHAT I HAD TO FIX

End every session the same way: "Now rewrite my saved instructions to include what I just told you, and show me the new version." Then save it.

WORKSHEET 04

The decision record.

Ten minutes. Keep it where you'd find it in six months — with the two rules on the same page as the choice.

The job
The choice tool · plan · whose account
What it costs real annual number
Who has it
What never goes in
Who reads it before it leaves
When we look again

REFERENCES

Every vendor statement quoted in this guide was checked against that vendor's own published documentation on 5 August 2026.

These products and their terms change frequently. Where a page doesn't match what's described here, the vendor's own documentation is current and this guide is not. The questions in Step 3 are built to outlast the answers.

- OpenAI — *How your data is used to improve model performance*; *Data Controls FAQ*; *Enterprise privacy*; *Data residency for ChatGPT*; *Sub-processor list*. help.openai.com · openai.com
- Anthropic — *Consumer Terms of Service*; *Is my data used for model training?* (consumer and commercial); *How long do you store my data?*; *Where are your servers located?*; *Regional compliance*. anthropic.com · privacy.claude.com · claude.com
- Google — *Gemini Apps Privacy Notice*; *Gemini AI features now included in Google Workspace subscriptions*; *Generative AI in Google Workspace Privacy Hub*; *Data covered by data regions*; *Google Workspace subprocessors*. support.google.com · workspace.google.com
- Microsoft — *Enterprise data protection in Microsoft 365 Copilot*; *Privacy FAQ for Microsoft Copilot*; *Microsoft 365 Copilot licensing*; *Advanced Data Residency*; *Microsoft 365 Copilot privacy and data security*. learn.microsoft.com · support.microsoft.com · microsoft.com
- Québec — *Loi sur la protection des renseignements personnels dans le secteur privé*, RLRQ c. P-39.1, ss. 3.1, 3.2, 3.5, 3.8, 5, 12.1 · *Charte de la langue française*, RLRQ c. C-11, ss. 4, 41. legisquebec.gouv.qc.ca · cai.gouv.qc.ca

Modus is vendor-neutral by design: tied to no platform or partner program, and no vendor named in this guide has any relationship with us. These four are named because they're what a business in Quebec is most likely to already have — not because they're a shortlist.

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