

Define your first AI teammate in 10 minutes

Write one clear answer in each box. The goal is not a complete AI strategy. It is one small role that your business can test safely and measure quickly.

1 JOB What recurring role should the AI perform? Use a familiar business title. 	2 WORK What three tasks should it prepare or complete? Make the output visible.
3 BOUNDARY What must always come back to a person for review or approval? 	4 RESULT What should improve within 30 days? Use one observable measure.

STARTING RESPONSIBILITY

☐ OBSERVE Read and identify	☐ PREPARE Create a draft	☐ RECOMMEND Suggest a next step	☐ APPROVAL Queue, then wait	☐ WITHIN LIMITS Act in a proven lane
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For most first roles, begin at Prepare. Let the teammate create useful work while a person still controls consequential actions.

YOUR ROLE IN ONE SENTENCE	Our AI teammate is a _____. Each _____, it will _____, _____, and _____. It must ask before _____. We will continue after 30 days if _____.
EXAMPLE Sales Coordinator. Each morning, review open opportunities, identify neglected leads, and draft follow-ups. Ask before contacting customers. Continue if it saves two hours a week and reduces missed follow-ups.	