

Business

Filled in by

Date

1 Job

What exactly is being handed over?

One line, in your own words. One job per card.

2 Owner

Who is accountable when it goes wrong?

A named person and their role ("Sam, office manager"), never "the AI".

3 Payoff

Why is it worth doing?

Time, money, a problem solved or a goal served, in your words. Only use numbers you actually know.

4 Inputs

What may it read?

Name the tools and the data. Everything else is off-limits by default.

5 Outputs

What does it produce?

Mark each one "drafts for approval" or "acts on its own".

6 Boundary

What must it never do?

Anything involving money, passwords or messages to customers needs approval by default. Add your own "nevers".

7 Check

How will you know it worked?

Something you can see, like "every quote gets a follow-up within 2 days".

8 Review date

When do you look again?

A date two to six weeks away.

9 Verdict

Is it worth handing over?

Worth it, Not yet, or Not worth it, with the reason.

☐ Worth it

☐ Not yet

☐ Not worth it

EXAMPLE, NOT A CLIENT A filled-in card, to show the level of detail that works.

1 Job What exactly is being handed over?	Follow up every quote we send that hasn't had a reply.
2 Owner Who is accountable when it goes wrong?	Jess, office manager
3 Payoff Why is it worth doing?	Quotes go cold because nobody chases them.
4 Inputs What may it read?	The scheduling tool's quote list, and the shared email inbox (read only).
5 Outputs What does it produce?	Follow-up email: drafts for approval. Weekly list of cold quotes: acts on its own (internal only).
6 Boundary What must it never do?	Never sends to a customer without approval. Never changes a price. Never touches invoices or payments.
7 Check How will you know it worked?	Every quote more than 3 days old has a drafted follow-up waiting for Jess.
8 Review date When do you look again?	4 weeks from the start
9 Verdict Is it worth handing over?	Worth it. Low risk while it only drafts, and the result is easy to see.

Tips

- **One job per card.** If a card covers two jobs, split it into two cards.
- **Name the owner.** If nobody can be named, the job isn't ready to hand over yet.
- **"Not worth it" is a good answer.** It means you checked before spending time and money.
- **Prefer to fill it in with your own AI?** The prompt is at virasai.com/role-card.