AI Role Brief

Give an AI employee a clear job and a human owner

Moxie free guide

“Help with operations” leaves a lot of room for interpretation. A useful role brief says which work belongs to the AI, which information it can use, and where a person needs to step in. The name can be fun. The responsibilities need to be clear.

Here, “AI employee” means a configured AI workflow supporting your team. It does not remove human accountability. Complete this brief for one role, then test it with a small, private assignment before expanding its responsibilities.

1 Define the job

Role name: _____

Human owner: _____

Backup reviewer: _____

Team or function supported: _____

Purpose in one sentence: _____

Recurring task this role owns: _____

Trigger or schedule: _____

Person receiving the output: _____

Output format and destination: _____

Write the purpose as an observable result. “Prepare a source-linked list of incomplete onboarding documents for the office manager” is easier to evaluate than “keep everything organized.”

2 Define the working materials

List only what this job needs. Avoid handing over an entire company drive because choosing a folder feels inconvenient today.

Approved source and location: _____

Record types, folders, or date ranges allowed: _____

Source owner and last review date: _____

Required company definitions or policies: _____

Approved example of good work: _____

Information the role must never use: _____

What to do when sources conflict or appear outdated: _____

If credentials are needed, use the tool's supported connection process. Do not paste passwords, keys, or customer secrets into this brief. Confirm that the connected account's actual permissions match the role.

3 Set the action boundaries

Complete all three lines with concrete actions and destinations. A blank means the action has not been authorized.

May do within the defined task: _____

Must ask before doing: _____

Must never do in this role: _____

For a first pilot, a practical boundary is: read the approved sample files, prepare a private draft, and stop for review. Keep customer messages, publication, payments, deletions, and changes to live records out of scope unless you have deliberately authorized them and configured the appropriate controls.

Instructions are part of the setup. They are not a security system. Where possible, use restricted folders, read-only connections, and account permissions to enforce the boundary.

4 Describe the handoff

Write the usual sequence in five short steps:

1. Receive or find: _____

2. Check before starting: _____

3. Prepare: _____

4. Verify against: _____

5. Hand to this person in this location: _____

Add the exceptions that matter:

Missing information: _____

Conflicting instructions or unexpected access: _____

Request outside the role: _____

Failed or uncertain save: _____

When a consequential action has an uncertain result, check its status before retrying. Two customer messages are not an improvement over one unverified message.

5 Define what counts as finished

Required fields or sections: _____

Source links, dates, or record references to include: _____

Accuracy checks: _____

Business or brand checks: _____

Allowed uncertainty and how to label it: _____

Who approves release or use: _____

Where completion will be verified: _____

A “done” message is not proof that a file was saved correctly. Check the actual file, destination, or system state relevant to the task.

A fictional role in practice

Fictional business: Harbor Home Services. **Role:** Intake Review Assistant. **Owner:** office manager. **Job:** review a fictional intake export every Friday and draft a missing-information list. **Sources:** the approved sample CSV and field definitions. **Output:** a private document with record IDs and missing fields. **Allowed:** read and draft. **Ask first:** any expansion of input sources. **Excluded:** contacting customers and editing the CRM. **Finished:** every source row is accounted for, missing values remain labeled missing, and the owner can open the saved draft. The pilot covers three exports, followed by a review of accuracy and effort.

Copy this role review prompt

> Review my completed AI Role Brief as a careful operations manager.
>
> Check for vague responsibilities, missing sources, overly broad access, unclear approval points, and completion claims that cannot be verified. Identify conflicts without silently resolving them. Do not assume this brief grants access to any tool.
>
> Return: 1) specific gaps, 2) a revised brief that preserves my boundaries, and 3) three small fictional test cases, including one missing-data case and one out-of-scope request. Do not perform the role, contact anyone, or change any system.
>
> My brief:
>
> [PASTE HERE]

Ready for a trial

- ☐ The owner understands and accepts the role.
- ☐ Source access is checked in the actual tools.
- ☐ Ordinary work and exceptions have clear handoffs.
- ☐ Completion requires evidence someone can inspect.
- ☐ The trial has a review date and can be stopped.

Want help turning this brief into a practical setup? Talk with Moxie about the role, your current tools, and the responsibilities you want to hand off.