COMPANION QUICK REFERENCE

AI TEAM BUSINESS QUICK REFERENCE

One founder directing six connected business functions

1 The six roles

Research

Purpose: Find useful evidence about customers, problems, competitors, channels, and business assumptions.
Typical output: Research brief, evidence log, unanswered questions, and recommended next test.

Marketing

Purpose: Turn approved evidence into useful market-facing messages and acquisition experiments.
Typical output: Message, content draft, listing draft, channel test, and response measurement.

Sales

Purpose: Turn attention and interest into qualified conversations, offers, proposals, orders, and decisions.
Typical output: Qualification record, sales-conversation plan, proposal, follow-up, and decision request.

Delivery

Purpose: Turn an accepted sale or order into reliable work, fulfillment, quality checking, acceptance, and payment follow-through.
Typical output: Onboarding checklist, delivery plan, completed work, quality check, and acceptance record.

Support

Purpose: Handle questions, problems, revisions, returns, refunds, and customer follow-through.
Typical output: Support response, issue record, resolution, escalation, and recurring-problem signal.

Operations

Purpose: Maintain the weekly view of customers, sales, delivery, support, cash, capacity, risks, and decisions.
Typical output: Weekly operating review, problem list, capacity view, cash record, and next priority.

2 The basic handoff

Connected workflow

RESEARCH > evidence
MARKETING > attention and responses
SALES > accepted offer or order
DELIVERY > completed work or fulfillment
SUPPORT > customer issues and recurring signals
OPERATIONS > review, decision, and improvement

Handoff rule

Every handoff should contain:

- What was requested
- Approved source material
- What was produced
- Evidence used
- Assumptions and uncertainty
- Problems or risks
- Required approval
- Recommended next action

3 Assign work with the ten-part prompt

Reusable assignment structure

Role: You are the [AI ROLE].
Business context: [WHAT THE BUSINESS SELLS, TO WHOM, AND HOW]
Objective: [THE BUSINESS RESULT REQUIRED]
Inputs: [APPROVED INFORMATION AND SOURCE MATERIAL]
Method: [STEPS OR CHECKLIST TO FOLLOW]
Constraints: [WHAT THE ROLE MUST NOT ASSUME, PROMISE, PUBLISH, OR DO]
Required evidence: [WHAT MUST SUPPORT THE OUTPUT]
Output: [THE EXACT ARTIFACT OR DECISION SUPPORT REQUIRED]
Escalation: [WHEN TO STOP AND ASK THE FOUNDER]
Founder approval: [WHAT MUST BE REVIEWED BEFORE EXTERNAL USE]

4 Keep the founder in control

Founder approval is required before:

- Committing money
- Setting or changing prices
- Making customer promises
- Sending proposals or contracts
- Publishing content or listings
- Accessing private customer information
- Issuing refunds
- Accepting major scope changes
- Delivering final work
- Automating consequential actions

Before accepting AI output, ask:

- Is it supported?
- Is it useful?
- Is anything invented?
- Does it fit the customer and offer?
- What requires my decision?

RUN AND IMPROVE THE BUSINESS

FROM WORK TO MEASURED IMPROVEMENT

Use the cycle, review the evidence, and automate only stable work

1 The business cycle

OFFER → CUSTOMER → SALE → DELIVERY → SUPPORT → REVIEW → IMPROVE

AI can prepare, organize, compare, draft, monitor, and recommend. The Founder owns commitments, money, judgment, quality, and final decisions.

2 Weekly business review

Ask once each week

1. What sold or moved closer to a sale?
2. Which customer conversations produced useful evidence?
3. What must be delivered or fulfilled next?
4. What is waiting for approval, acceptance, or payment?
5. Which customer or support problem appeared?
6. How much usable capacity remains?
7. What happened to cash, costs, refunds, and inventory?
8. Which assumption was disproved?
9. What is the largest current constraint?
10. What single improvement or experiment should run next?

3 Service-business numbers

- Prospects contacted
- Replies
- Customer conversations
- Qualified opportunities
- Proposals sent
- Sales accepted
- Revenue invoiced
- Cash received
- Delivery hours
- Revisions
- Outstanding payments
- Available capacity

4 E-commerce numbers

- Visits or listing views
- Product-page engagement
- Add-to-carts
- Orders
- Conversion rate
- Average order value
- Product cost
- Packaging and fulfillment cost
- Marketplace and payment fees
- Acquisition cost
- Returns and refunds
- Inventory available
- Cash received

Remember: Attention, followers, clicks, and carts are not revenue.

5 Automate only stable work

Eight questions before automation

1. Does this task recur often enough to matter?
2. Is the manual method stable and understood?
3. Are the required inputs reliable?
4. Can the result be checked before consequences occur?
5. Is failure detectable and recoverable?
6. Can a human pause or override it?
7. Is there a record of what happened?
8. Does it avoid unauthorized money, customer, legal, privacy, or publishing decisions?

Decision

Mostly no: keep it manual
Mixed answers: create a reusable prompt or checklist
Mostly yes: test a supervised workflow
All yes with low consequence: consider limited automation

Use the complete companion tools

Download the editable Starter Kit and this printable guide at:
https://dcfrancisco.github.io/ai-team/