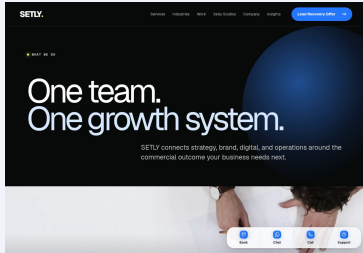


AI assistant job description

Give an assistant a narrow, useful role.



FROM THE SETLY PROJECT LIBRARY

A real project screenshot for visual inspiration. Follow the written steps for your own business.

YOUR ACTION PLAN

- 1 List the tasks it may handle and the information it can rely on.
- 2 Name tasks it must pass to a person.
- 3 Define the tone, business hours and expected next step.
- 4 Test whether the scope is understandable before connecting customer channels.

EXAMPLE - ILLUSTRATIVE

A studio assistant can explain published services and collect an enquiry; custom pricing goes to a person.

CHECK YOUR RESULT

Can you state the assistant's boundary as clearly as its capabilities?

AI assistant job description

Use the prompts below to make this resource specific to your business. Save a local copy after completing it. Keep passwords and private customer data out of this worksheet.

Assistant purpose:**Allowed tasks:****Approved information:****Human-only tasks:****Handoff route:****DONE WHEN**

Can you state the assistant's boundary as clearly as its capabilities?

FURTHER READING

[HighLevel Support](#)

Independent Setly planning resource. Platform settings and requirements can change; use the linked official help for current configuration details.