

AI Employee Job Description Template

Define Exactly What Your AI Employee Will Do

From: *Hire AI, Not People* by Shawn Kercher | Chapters 2 & 6

Instructions

Fill out this template before building your AI employee. Just like hiring a human, clarity upfront prevents problems later. If you can't complete a section, you're not ready to build.

Basic Information

AI Employee Name: _____

Role Type: (Circle one) - AI Front Desk - AI Sales Rep - AI Support Agent - AI CRM Assistant
- AI Content Creator - AI Operations Assistant - Other: _____

Reports To: _____

Date Created: _____

Core Responsibilities

What is this AI employee responsible for? Be specific.

1. _____
 2. _____
 3. _____
 4. _____
 5. _____
-

Channels

Where does this AI employee work?

Website chat

SMS/Text messages

Phone calls (voice)

Email

Facebook Messenger

Instagram DMs

WhatsApp

Internal systems only

Other: _____

Hours of Operation

24/7

Business hours only: _____ to _____

Custom schedule: _____

Knowledge Base Requirements

What does this AI employee need to know to do its job?

Services/Products

Pricing

Policies (cancellation, deposits, guarantees)

Frequently Asked Questions (list top 10)

Question	Answer
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

Voice Guidelines

How should this AI employee sound?

Tone: (Circle one) - Formal / Professional / Friendly / Casual / Playful

Style: (Circle one) - Short & direct / Conversational / Detailed

Personality traits: _____

Example message in the right voice: _____

Things to NEVER say: _____

Behavior Rules

How should the AI employee handle specific situations?

If this happens...	Do this...
Customer asks about pricing	
Customer is outside service area	
Customer seems frustrated	
Question not in knowledge base	
Customer asks for a human	
No response after 24 hours	

Autonomy Levels

What can the AI decide on its own vs. what needs human involvement?

Level 1: Full Autonomy (AI handles completely)

- _____
- _____
- _____

Level 2: Act Then Notify (AI handles, human gets notified)

- _____
- _____
- _____

Level 3: Recommend Then Wait (AI suggests, human approves)

- _____
- _____
- _____

Level 4: Escalate Immediately (AI stops, human takes over)

- _____
- _____
- _____

Escalation Settings

Primary escalation contact: _____

How to notify: (Circle all that apply) - Email - SMS - Slack - Phone call - App notification - Other: _____

Escalation triggers: - Customer explicitly asks for human - Customer expresses frustration/anger - Question outside knowledge base - High-value opportunity (above \$_____) - Sensitive topic: _____ - Other: _____

Success Metrics

How will you measure if this AI employee is doing a good job?

Metric	Target	How to Measure
Response time		
Resolution rate		
Escalation rate		
Customer satisfaction		

Review Schedule

First review: _____ days after launch

Ongoing reviews: Weekly / Bi-weekly / Monthly (circle one)

What to check in each review: - Conversation logs - Questions AI couldn't answer -
Escalation patterns - Customer feedback - Metric performance

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