

Where should this task live?

Every task you hand to AI needs a home. Three questions sort any task in your business into the right one. Run your five most annoying tasks through it. Formatted for printing, for those of you who still do that.

STEP 1 • ASK THESE THREE, IN ORDER

- 1 Does this task repeat, or is it a project you will come back to?**
No: leave it in the conversation and get on with your day. Yes: keep going.
- 2 Does the assistant need to work inside your files, or just know about your business?**
Know about: give it a project. Work inside: it needs a workspace.
- 3 Should it run while you are not there?**
Yes: that is autopilot work, and it is the kind worth paying a builder to set up right.

STEP 2 • THE FOUR HOMES

THE HOME	WHAT IT IS	WHAT BELONGS HERE	WHAT IT COSTS YOU
The conversation PLAIN CHAT	A chat window. Nothing is saved, because nothing needs to be.	Work that never comes back. One clause, one email, one question.	Nothing. You are already here.
The project PROJECTS • GEMS	Still chat, with a filing cabinet attached. Standing instructions plus your reference files, loaded once.	Anything you are tired of re-explaining. The weekly update, the standard reply, the recurring draft.	About twenty minutes, once. You can do it yourself this week.
The workspace CLAUDE COWORK	The assistant sits in your actual folders. It reads the real files and writes the real files.	Work that lives in documents, next to the last four of the same thing.	One careful setup. Paid plan required.
The autopilot CLAUDE CODE	Scheduled work that runs while you are not there, connected to the calendar and the inbox.	Anything you want finished before you sit down.	Scope this one with a builder. One page of instructions is the deliverable.

WHAT MOVING A TASK COSTS

Down a rung is cheap. A task that lives in a project runs fine in a conversation; you just re-explain it every time.

Up a rung costs a setup, not a rebuild. The instructions you wrote for the project are the same instructions the workspace reads.

Write it down once. The page that describes the task is what moves. Everything else is which tool is holding it.

THE ONE LINE TO SAY TO A BUILDER

"Set up the briefing so it runs on a schedule and reads these three sources, and show me the one page of instructions it follows."

After the test you can name what you want built, instead of asking for "AI" and hoping. A builder can quote that.

STEP 3 • YOUR FIVE MOST ANNOYING TASKS

		REPEATS?	IN YOUR FILES?	RUNS ALONE?	ITS HOME
1					
2					
3					
4					
5					