Meet Your AI Team

Four experts. One brief. You direct — they execute.

The team you didn't know you could afford.

One brief in. It gets richer at every station. You brief the first AI once — each one **builds on the last and writes the brief for the next.** Your work compounds; it doesn't restart.

Your Business
THE RAW MATERIAL

Your assessment of your time, energy, and focus.

›

ChatGPT
THOUGHT PARTNER

+ Clarity. Synthesizes your decisions into one brief & flags contradictions.

›

Gemini
RESEARCH TEAM

+ Evidence. Deep-researches your market, buyers & biggest risk.

›

Claude
STRATEGIC ADVISOR

+ Judgment. Pressure-tests the plan & drafts the chapter you skipped.

›

Notebook LM
CREATIVE STUDIO

+ Polish. Turns it into a board brief, investor audio & a one-pager.

START	AFTER CHATGPT	AFTER GEMINI	AFTER CLAUDE	AFTER NOTEBOOKLM
Raw decisions	A clear brief	Researched brief	Tested strategy	Finished assets

Leverage Your AI Team

Where do your CEO hours actually go? For each function, jot rough hours — then decide: **does this need to be you?** *(Solo? Read "me." Team? Read "me or my top person.")*

1 The Value Test (ASSESS)

WHERE CEO HOURS GO	HRS / WK	NEEDS ME?	IF NOT ME — THEN WHO OR WHAT?
Strategy & vision		☐ Yes ☐ No	
Sales & business development		☐ Yes ☐ No	
Client delivery & account work		☐ Yes ☐ No	
Finance & bookkeeping		☐ Yes ☐ No	
Marketing & visibility		☐ Yes ☐ No	
Ops & admin (invoicing, scheduling, follow-up)		☐ Yes ☐ No	
Hiring, HR, team leadership		☐ Yes ☐ No	

If I could reclaim 10 hours this week, I would spend them on:

The Leverage Diagnostic

Protect what only you can do. Compound the rest.

Leverage protects your genius.
Mapping frees your calendar.

2 The Leveraged Move (ASSESS)

Look at your three biggest time sinks. Can you concisely explain what **you** bring that no one else could?
If yes — protect it. If no — that's leverage.

#	THE FUNCTION I SINK HOURS INTO	MY IRREDUCIBLE CONTRIBUTION — IN ONE SENTENCE
1		
2		
3		

3 The Governance Frame (PROTECT)

Before AI becomes a team, decide what stays yours — your IP, your methodology, your client's trust.

YOUR IP & METHODOLOGY
Name your signature framework — the thing that's uniquely yours.

CLIENT & CONFIDENTIAL DATA
What client info, contracts, or financials will you never paste into a public AI?

YOUR VOICE & JUDGMENT
Which decisions or communications must sound like you — not a model?

MY GOVERNANCE RULE — IN ONE SENTENCE
"What must never touch an AI in my business is ___."

4 The Leverage Map (COMPOUND)

COMPOUND

For each function, decide the honest next move. This is your action plan — and tells your AI team where to start.

FUNCTION IN YOUR BUSINESS	KEEP IT MYSELF	DELEGATE TO A PERSON	ORCHESTRATE WITH AI	NOT RIGHT NOW
Visibility & content *LinkedIn, thought leadership, positioning*	☐	☐	☐	☐
Sales follow-up & nurture *Deal cadence, pipeline check-ins, warm outreach*	☐	☐	☐	☐
Market & competitor research *Buyer intel, market shifts, positioning risk*	☐	☐	☐	☐
Financial pressure-testing *Modeling risk, stress-testing plans, board prep*	☐	☐	☐	☐
Invoicing, admin & ops *The undignified drains on your calendar*	☐	☐	☐	☐
Meeting prep, briefs & recaps *Getting sharp before rooms that matter*	☐	☐	☐	☐
Proposals, decks & capability statements *The assets that win the work*	☐	☐	☐	☐
Strategy & big decisions *Where only you can sign the check*	☐	☐	☐	☐

1 ChatGPT — Synthesize & look for blindspots

Paste your captured decisions from pages 1–2 — or your Leverage Map row from page 4. Merge into one brief and surface where things disagree.

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"Here's my business context [paste]. Synthesize it into one strategic brief. Then tell me where any two decisions contradict — especially strategy vs. my real financials or my time reality. Be direct."
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2 Gemini — Research your real position

Turn on Deep Research. Upload the brief. Ground it in your differentiators — not a generic scan.

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"Using this brief, research my market: what my ideal buyers search, where demand is shifting, and the biggest risk to my positioning. Cite sources."
```

3 Claude — Pressure-test & fill the gap

Upload brief, research, and any financial signals you have. Pressure-test the plan — and draft the piece you never got to.

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"Pressure-test my strategy. Model my top risk. Then draft a first version of [the gap I named on page 4] using what I have. Mark every assumption I must confirm."
```

4 NotebookLM — Produce the asset

Upload all sources. Generate a board brief, an investor audio walk-through, or a one-pager — built only from your material.

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"From these sources, create a board-ready briefing and an audio overview I can share with a board, an investor, or my team."
```

YOUR CEO COMMITMENT

Who I'm becoming this week

Not a to-do list. A decision about the CEO you refuse to keep being — and the one you're stepping into.

1	**What I'll stop doing that AI can now handle for me:**
2	**What I'll start doing that only I as CEO can do:**
3	**The one AI advisor I'll spend 30 minutes with this week — and what I'll bring it:**

ONE RULE BEFORE YOU PASTE

AI drafts the gap — it does not invent your truth.

Use a business account, never paste bank logins, passwords, or client-confidential data, and treat every AI-drafted number as a **scaffold to confirm.**

You stay the CEO; AI is your team.

BONUS: Your CEO Catalyst Work, Leveraged

LOGIN TO WBENC LIFT eLearning Portal

> “ Your Playbook isn't a finish line. It's the smartest brief you'll ever hand to a team you didn't know you could afford.

WHERE ARE YOU RIGHT NOW? *— Missed a session? That gap is where AI helps most. Check one box per chapter.*

YOUR CEO CATALYST PLAYBOOK	HAVE IT	STARTED	NOT YET
Ch. 1 — Strategic Framework	☐	☐	☐
Ch. 2 — Corporate Contracting	☐	☐	☐
Ch. 3 — Financial Signal Diagnostic	☐	☐	☐
Ch. 4 — Funding Readiness	☐	☐	☐

Did the chapter? Summarize your answer on the right. Missed the session? The question is your prompt — draft an answer, or let AI help on pages 3–5. Either way, you leave with a brief.

CHAPTER 1 Strategic Framework for Growth

THE DECISION	YOUR ANSWER
2029 Headline *Value & impact you want written*	
Enterprise Value Drivers *3 things that create sustainable value*	
The Intentional No *What you'll decline to protect focus*	
Primary Market *Who you're designed to serve*	
CEO-Owned Moves *What must stay yours*	

CHAPTER 2 Corporate Contracting Tools

THE DECISION	YOUR ANSWER
Business Summary *Who you are in 1–3 sentences*	
Core Capabilities *Your best-in-class expertise*	
Differentiators *3–4 proofs you're the best to hire*	
Past Performance *Key clients & strongest proof*	
The Offer / Next Step *The irresistible next step*	

CHAPTER 3 Financial Signal Diagnostic

THE DECISION	YOUR ANSWER
Margin Trend *Gross margin over 2–3 yrs — and why*	
Revenue Concentration *Top client % ___ · Top 3 % ___ · If #1 vanishes 90 days?*	
Revenue Predictability *Model type — predictable or volatile?*	
Owner Dependency *Profit tied to you, or a scalable team?*	
The #1 Lever *Most important lever to increase enterprise value*	

CHAPTER 4 Funding Readiness

THE DECISION	YOUR ANSWER
The Ask *How much, by when, what type*	
Use of Funds *The 2–3 biggest buckets*	

THE DECISION	YOUR ANSWER
What It Achieves *The measurable outcome*	
Repayment Story *Revenue drivers that make repayment credible*	
Top Risk & Mitigation *The risk a funder flags — and your fix*	

You now hold your brief. Whatever you filled in — even partially — is exactly what your AI team needs. Turn the page and meet the team.