

ChatCEO Quick Start

What to expect over the 90 days of this program

Over the 90 days of the ChatCEO Quick Start, your dedicated XpertLoop Operator will stand up your private ChatCEO instance, load it with the context of your business, and produce ten deliverables with your input and approval. By the end of the program, you will have a working operating system for your company and the habit of running it in ChatCEO. You can then choose to run the system yourself or continue to engage with your Operator.

How You Will Work with Your Operator

- **Your time commitment is minimal.** Your direct involvement centers on two items:
 - One 60-minute intake interview in week one
 - One 30-minute working session per week

The Quick Start is otherwise driven by your Operator, with ChatCEO handling the heavy lifting.

- **ChatCEO drafts; the Operator edits; you decide.** You will never be asked to produce a document from scratch. Every deliverable arrives as a draft, ready for your reaction and approval.
- **Every approved deliverable is loaded into ChatCEO by the Operator.** The system's value compounds with context. As ChatCEO learns your strategy, your org chart, your goals and more, the output becomes increasingly valuable and usable.
- **Security and confidentiality is our priority.** CEO conversations and your company's materials often contain sensitive information and they will be treated accordingly by your Operator and within ChatCEO. We employ industry-leading encryption and privacy measures and never share your content with any LLMs or use it for training.

Intake: What Your Operator Will Ask For in Week One

Your Operator will collect the following, working with your executive assistant, chief of staff, and/or department heads:

- Strategy documents and any record of in-flight goals and priorities
- Brand positioning and messaging documentation
- Company website and LinkedIn page, plus your LinkedIn profile
- Names and websites of your top three to five competitors
- Existing personality assessment results and User Manuals, if any
- Roster of board members
- Calendar integration with ChatCEO
- Your “board of advisors”: three to five public figures you admire

Then, during a 60-minute intake interview with you, your Operator will capture what is often not documented: your priorities, worries, leadership philosophy, and how you spend your week. With your permission, the meeting is recorded and the transcript becomes foundational context for ChatCEO.



DAYS 1–30

Phase One: Setup

Your ChatCEO instance goes live in week one. Your Operator provides logins for you and anyone you designate (EA, chief of staff), connects your calendar, and activates your daily and weekly email briefs: a weekday brief plus a Saturday strategy brief covering news and competitor activity specific to your business.

Then your Operator sits with you and runs ChatCEO on real, current situations:

- **Meeting prep.** Receive briefs for the major meetings on your calendar this week, with attendee backgrounds, suggested talking points and questions, and a draft agenda.
- **Competitor and market research.** Get set up to receive the Saturday Intel Brief with the latest happenings in your market, along with what it means for your business.

- **Decision making.** Take one live decision you're facing and work it through with ChatCEO: generating possible choices, exploring second-order effects, and stress-testing the decision you go with. You'll use the Thinking Partner skill and the AI Board of Advisors, where you can get perspectives from the three to five advisors you chose at intake.

The first three deliverables are also presented in this phase:

- ▶ **Deliverable 1: CEO User Manual and Assessments.** DISC and CliftonStrengths assessments, built into a personal User Manual that is reviewed with you and shared with your direct reports, plus a Communication Blueprint giving your team pointers on how best to interact with you.
- ▶ **Deliverable 2: 1-Page Strategic Plan.** Your mission, vision, differentiating values, and strategic objectives for the next two to three years, drafted from your existing strategy material and refined with your feedback.
- ▶ **Deliverable 3: Org Chart.** The top three layers of your organization, with imbalances and gaps annotated as observations, not prescriptions. Structural fixes come later in the program if you want them.

DAYS 31–60 **Phase Two: Building Out**

With the foundation loaded, ChatCEO is built out with further context. This is the heaviest drafting phase; your weekly sessions are reserved for reaction and approval.

- ▶ **Deliverable 4: Executive Performance Profiles.** One per direct report, covering responsibilities, decision rights, and the KPIs that define success in the role, reviewed with you and with each executive.
- ▶ **Deliverable 5: Board Map.** Who sits on your board, their background, expertise, and priorities, plus a Board-CEO Operating Agreement clarifying which decisions require board approval versus which you can make alone.
- ▶ **Deliverable 6: Operating Rhythm.** A weekly executive team meeting, 1:1s with each direct report, and protected strategic thinking time on your calendar, plus your next board meeting and leadership team offsite. ChatCEO helps you prepare for the first cycle of each.

- ▶ **Deliverable 7: Company Quarterly Goals.** Five to seven goals you own, each measurable, time-bound, and traceable to a strategic objective in your 1-Page Strategic Plan.



DAYS 61–90

Phase Three: Up & Running

The final thirty days put the final touches on the operating system.

- ▶ **Deliverable 8: Cascaded Quarterly Goals.** Your leadership team and their direct reports each draft their own set of goals feeding up into yours, so everyone understands how they contribute to the quarter.
- ▶ **Deliverable 9: Twelve-Month Operating Calendar.** The full cadence committed to the calendar for the next twelve months: weekly meetings and 1:1s, strategic thinking time, quarterly goal-setting, offsites, and board meetings.
- ▶ **Deliverable 10: 90-Day Checkpoint.** A walkthrough of everything that now lives in ChatCEO, confirmation of who maintains what going forward, and a short exit review: what you use regularly, what you haven't touched, and what you want next. At this point you either take the system fully in-house or continue with your Operator in an ongoing engagement.