

# 1000+

Unique, actionable prompts for C-suite and senior leaders

6 Prompt Techniques · 10 Business Categories · Ready to Use

<b>Board Prep</b> 135 prompts	<b>OKRs &amp; Goals</b> 127 prompts
<b>Strategy Memos</b> 121 prompts	<b>HR &amp; Talent</b> 125 prompts
<b>Procurement</b> 83 prompts	<b>Customer Success</b> 87 prompts
<b>Exec Reporting</b> 83 prompts	<b>Productivity</b> 85 prompts
<b>Financial Planning</b> 81 prompts	<b>AI Leadership</b> 76 prompts

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## What makes these prompts different

Every prompt describes a specific, realistic business scenario — no [Variable] placeholders. Each is ready to paste into any AI tool and get a high-quality, usable result.

## Six prompt techniques

CREATE Format — full structured prompts for complex tasks. One-Shot — includes a worked example. Few-Shot — 2–3 examples guide the output style. Chain-of-Thought — the AI reasons step-by-step. Role-Based — assigns an expert persona. Direct & Precise — short, specific prompts for defined tasks.

## Getting the best results

Paste the prompt as written first. Review the output. Then add your specifics: company name, industry, actual numbers. The prompts are designed as high-quality starting points.

## Navigating 1,003 prompts

Ten categories, each with a section header showing its number and count. Prompts are numbered #0001–#1003 globally. Use the Table of Contents to find your category.

## Save time with a personal library

Bookmark 10–15 prompts you use repeatedly. Adapt them once for your company and save as personal templates. A library of 15 personalized prompts outperforms 1,000 generic ones.

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01 Board Prep & Governance	135 prompts
02 OKRs & Goal Setting	127 prompts
03 Strategy Memos & Analysis	121 prompts
04 Hiring & Talent Management	125 prompts
05 Vendor & Procurement	83 prompts
06 Customer & Sales Comms	87 prompts
07 Executive Reporting	83 prompts
08 Meeting Prep & Productivity	85 prompts
09 Financial Analysis & Planning	81 prompts
10 AI & Innovation Leadership	76 prompts
<b>TOTAL</b>	<b>1,003</b>

## SECTION 01

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135 unique prompts for senior executives

#### #0001 — Board Meeting CEO Opening — CREATE Format

Context: You are the CEO of a 2,000-person B2B SaaS company. Revenue is \$180M ARR, growing 22% YoY but growth has decelerated from 35% last year. EBITDA is -8% as you invest in expansion. The board meeting is tomorrow. Two activist investors joined the board 6 months ago. Request: Write a 3-minute CEO opening statement for the board meeting that acknowledges the deceleration honestly, explains the investment thesis behind it, and sets a constructive tone for a challenging discussion. Adjustments: Do not be defensive. Acknowledge the numbers before explaining them. Include one specific proof point that the investment is working. End with a clear agenda for the session. Tone: Confident, direct, not defensive. Board members have read the pack. Do not re-read the data at them.

#### #0002 — Board Audit Committee Risk Briefing — CREATE Format

Context: You are the CFO presenting to the Audit Committee. This quarter a material weakness was identified in the revenue recognition process for multi-element contracts. The weakness has been disclosed to the external auditor. No restatement is required, but remediation controls must be in place within 90 days. Request: Draft the oral presentation script for the Audit Committee — maximum 8 minutes. Cover: (1) what the weakness is and how it was identified, (2) financial impact assessment, (3) root cause, (4) remediation plan with timeline and owner, (5) what the committee needs to approve today. Adjustments: Use plain language. Quantify the revenue contracts affected. Do not minimize the seriousness but also do not create alarm beyond what is warranted. The external auditor will be in the room. Tone: Accountable, methodical, solution-focused.

#### #0003 — Compensation Committee Exec Pay Proposal — CREATE Format

Context: You are the Chief People Officer presenting to the Compensation Committee. You are proposing a redesigned executive compensation package for the new CFO hire. Market data shows the CFO role at comparable companies (\$150M-\$250M revenue tech companies) pays \$350K-\$450K base plus 30-50% bonus and \$2M-\$4M equity over 4 years. Your current CFO budget is \$300K base. Request: Write the compensation committee briefing: (1) market data summary with 3 comparable benchmarks, (2) your proposed package, (3) total cost to company vs. the value of the hire, (4) recommendation with rationale, (5) the specific resolution you need the committee to approve. Examples: A well-structured comp committee briefing uses this format — Market context (2 paragraphs) → Proposal table (base/bonus/equity/total) → Rationale (3 bullets) → Resolution text. Tone: Data-driven, not emotional. The committee cares about market competitiveness and shareholder alignment, not how much the company 'values' the hire.

#### #0004 — Board Strategy Deep Dive Pre-Read — CREATE Format

Context: Your board has a 2-hour strategy session next month focused on the question: Should the company expand into the European market in 2026 or focus on deepening US market share? The company is \$90M ARR US-only. You have been asked to prepare the pre-read document. Request: Structure a 12-page pre-read document covering: (1) executive summary of the decision, (2) current US market position and headroom, (3) European market sizing and entry requirements, (4) 3-year financial model for each scenario (US focus vs. Europe entry), (5) key risks and mitigations, (6) management recommendation with rationale, (7) questions for board discussion. Adjustments: The document should be designed so directors can read it in 20 minutes and arrive at the session informed. Each section max 1-1.5 pages. Use tables where possible. Do not bury the recommendation — lead with it. Tone: Analytical, clear, decisive. The board is experienced — they do not need background on what a P&L is.

#### #0005 — Board Director Onboarding Briefing — One-Shot

You are preparing a new independent board director's onboarding briefing. They join in 3 weeks and have a financial services background but no prior knowledge of our company (AI-powered HR tech, \$120M ARR, PE-backed, 600 employees). Write a 6-page onboarding briefing covering: business model, competitive positioning, key metrics, board governance structure, open strategic questions, and the top 3 issues they should be aware of immediately. Example of how to format the 'Key Metrics' section: "Key Metrics — Q3 2025: ARR \$120M (+28% YoY) | NRR 118% | CAC Payback 18 months | Gross Margin 74% | Churn 8% annually | Headcount 600 (+15% YoY)" Write the full briefing now.

### #0006 — Board Meeting Action Log — One-Shot

You facilitated a 3-hour board meeting. The decisions and action items that emerged are listed below as raw notes. Transform them into a clean, professional board action log with columns: Action Item, Owner, Due Date, Status (Open), and Context/Resolution. Raw notes: - CEO to bring revised M&A; targets to November board — agreed after debate on pricing multiples - CFO to reforecast Q4 with two scenarios: base (no new enterprise deals) and upside (3 deals close). Due before next audit committee meeting Oct 14 - Legal to review data residency requirements for EU expansion before strategy session — Priya to own - CHRO and CEO to discuss succession plan for VP Sales offline — not to be documented formally in minutes - Board approved the \$4M capex for the Singapore office build-out — unanimous - Jim (board chair) to reach out to the Goldman Sachs MD about debt refinancing options — personal action, informal Produce the action log. For the succession planning item, note it as a confidential action not for formal minutes.

### #0007 — Board Committee Charter — One-Shot

Draft a board-level AI Governance Committee charter for a publicly listed financial services company. The charter should establish the committee's mandate, composition, and responsibilities given the EU AI Act and SEC AI disclosure requirements. Example charter clause format: "3.2 The Committee shall meet no less than quarterly and shall maintain written records of its deliberations. A quorum shall be two members. The Committee Chair shall report to the full Board at each regular Board meeting." Write the complete charter — purpose, membership requirements, responsibilities, meeting cadence, reporting structure, and annual review process. Make it ready to present to the full board for adoption.

### #0008 — Crisis Governance Response Plan — One-Shot

Your company's AI hiring tool has been flagged in a news report as potentially discriminatory against candidates over 50. The story is publishing tomorrow morning. You are the Chair of the Audit Committee. You have 12 hours. Draft the governance response plan covering: (1) immediate actions for the next 12 hours, (2) board notification protocol, (3) who speaks for the company and what they say initially, (4) audit committee's specific oversight role in the response, (5) 30-day remediation review process. Example of the 'who speaks' section: "Company spokesperson: General Counsel for legal statements. CEO for business impact statements. No board members should comment publicly in the first 72 hours. Prepared holding statement: [...]" Produce the full governance response plan.

### #0009 — Board Pack Executive Summary — Few-Shot

You need to write the Executive Summary page for a board pack — the single most-read page that must convey the essential state of the business in under 300 words. Here are two examples of strong executive summaries: Example 1 (good quarter, one concern): "Q2 Performance: Revenue of \$42M beat plan by 4%. EBITDA margin improved 200bps to 14%. ARR reached \$168M (+31% YoY). Customer NPS rose 8 points to 62. The one area requiring board attention is enterprise sales velocity — pipeline coverage dropped to 2.1x against a 3x target. Management is implementing a new pipeline hygiene process and has added two enterprise AEs. No action required from the board at this time — management is monitoring closely." Example 2 (challenging quarter, action required): "Q3 Performance: Revenue of \$38M missed plan by 9% due to three large enterprise deals slipping to Q4. EBITDA margin declined to 8% against a 12% target. Management has reviewed the pipeline and has high confidence in two of the three deals closing before year end. The board is asked to approve a revised Q4 forecast range of \$155M-\$165M ARR (vs. original \$172M plan). One strategic update: we have received an unsolicited M&A; approach from [Acquirer]. The board will discuss in executive session." Now write the Executive Summary for this situation: Company: B2C fintech, \$55M revenue, Q3 just closed. Revenue in line with plan (+1%). EBITDA -15% (investing phase). One key personnel change: VP Marketing left. AI product launch successful — 45% of users engaged with it in first month. No board action required.

### #0010 — Board Resolution Drafting — Few-Shot

Draft formal board resolutions for 3 routine corporate actions. Resolutions must be precise legal-adjacent text suitable for inclusion in official board minutes. Examples of properly formatted resolutions: "RESOLVED, that the Company's Annual Report on Form 10-K for the fiscal year ended December 31, 2024, in the form presented to the Board of Directors, is hereby approved, and the appropriate officers of the Company are authorized and directed to execute and file such Annual Report." "RESOLVED FURTHER, that the Board of Directors hereby authorizes and approves the renewal of the Company's Directors and Officers Liability Insurance policy with [Insurer] for the policy period commencing January 1, 2026, at an annual premium not to exceed \$[X], and that the CEO and CFO are authorized to execute all documents necessary to effect such renewal." Now draft resolutions for: (1) approving the 2026 operating budget of \$240M, (2) approving a share repurchase program of up to \$50M, (3) appointing a new external auditor (Ernst & Young) following a competitive RFP.

### #0011 — Board Director Performance Evaluation — Few-Shot

You are conducting the annual board effectiveness review. Write evaluation criteria and sample ratings for 3 types of director performance issues you commonly encounter. Examples of how to frame director feedback: Constructive example (attendance issue): "Director has contributed meaningfully to committee work. Attendance has been below expectation — 3 of 6 board meetings missed in the past 12 months due to competing obligations. Chair has spoken to director privately. Recommend: formal attendance policy reminder; if pattern continues, Chair to discuss re-election implications." Constructive example (conflict of interest): "Director's advisory role with a potential vendor was disclosed appropriately and on time. Director recused from all related discussions. Process followed correctly. No issues." Now write evaluations for: (1) a director who consistently comes underprepared and asks questions that are answered in the pre-read, (2) a director who dominates discussions and talks over other board members, (3) a director who has not attended any committee meetings despite chairing the Compensation Committee.

### #0012 — Board Decision Framework — Think Step by Step

The board is considering a \$25M acquisition of a smaller competitor. Before presenting this to the board for a vote, I need to work through the decision framework carefully. Think through this step by step: 1. What are the 3-5 most important questions a board should ask before approving an acquisition at this size? 2. For each question, what information would be needed to answer it? 3. What is the appropriate governance process — who needs to approve what, and in what sequence? 4. What are the red flags that should pause or kill the deal, regardless of the financial case? 5. What does a 'yes' vote require that a responsible board cannot skip? Work through each step before giving your recommendation on the governance process.

### #0013 — Fiduciary Duty Analysis — Think Step by Step

A board member has come to you with this dilemma: She sits on the board of a company that is considering a strategic partnership with a company where her family office holds a significant investment. She wants to know how to handle this properly. Think through this step by step: 1. What type of conflict is this — actual, potential, or perceived? Explain the distinction. 2. What are her fiduciary duties in this situation (duty of loyalty, duty of care, duty of disclosure)? 3. What is the correct procedural process she must follow? 4. What documentation should be created? 5. What would 'failure to handle this correctly' look like, and what are the consequences? 6. What is your recommendation for how she should proceed? Be specific and practical, not just theoretical.

### #0014 — Board Prep as Experienced Company Secretary

Act as an experienced company secretary with 20 years of FTSE 100 governance experience. I am a new Company Secretary at a PE-backed SaaS company preparing for my first board meeting. The board has 7 members: 2 founders, 2 PE partners, and 3 independent directors. The meeting is in 10 days. Give me: 1. The standard pre-meeting timeline and checklist (T-10 days to T-day) 2. The 5 most common mistakes new company secretaries make in board prep 3. What to have ready 'just in case' during the meeting 4. How to handle a director who tries to add agenda items at the last minute 5. Your one piece of advice that took you years to learn

#### #0015 — Investor Relations Script as Experienced IR Director

Act as a senior IR director with 15 years of experience managing earnings calls and investor communications for public companies. I need to prepare for a difficult earnings call. We are missing revenue guidance by 8% due to a large deal slipping to next quarter. We are reaffirming full-year guidance but reducing Q3. Give me: 1. The opening prepared remarks (max 4 minutes) — honest but not alarmist 2. The 5 most likely analyst questions and suggested responses 3. What NOT to say (the traps that sink companies on earnings calls) 4. How to handle a hostile analyst who is trying to establish that guidance is unreliable 5. The follow-up investor letter to send after the call

#### #0016 — Board Chair Succession Planning as Governance Expert

Act as a governance expert specializing in board succession and corporate leadership transitions. The current board chair has announced he is stepping down in 6 months after 8 years in the role. The board has 9 members, and there are 2 internal candidates: one from the Audit Committee and one from the Compensation Committee. There is also appetite to consider an external search. Design the full succession process: 1. What criteria should the new chair be selected on? 2. How should the process be structured to avoid the current chair unduly influencing his successor? 3. What is the role of the Nominations Committee vs. the full board? 4. How do you evaluate the internal candidates fairly? 5. Under what circumstances would you go external, and what does that process look like? 6. Timeline recommendation: what are the key milestones in a 6-month window?

#### #0017 — Board Pack Transmittal Email

Write a professional board pack transmittal email from the CEO to all board directors. Pack is for the Q3 board meeting on October 15. The email should note the 3 most important items for directors to read carefully before the session, flag 1 item that requires a vote, and provide the call-in details. The pack is attached as a PDF. Tone: professional and respectful of directors' time.

#### #0018 — Director Independence Disclosure Template

Draft a director independence questionnaire to be completed by all board director candidates. The questionnaire should cover: commercial relationships with the company, family member employment, material equity holdings, advisory roles at competitors, and prior regulatory actions. Format as a formal document with signature block. Comply with general corporate governance best practices.

#### #0019 — Board Meeting Minutes Framework

Create a template for formal board meeting minutes. The template should include: header (company, date, location, attendees, quorum confirmation), recording of approvals from prior minutes, main agenda items with discussion summary and decisions, votes (unanimous or with dissent recorded), executive session note, and closing. Note where to record formal resolutions vs. discussion points.

#### #0020 — Whistleblower Report to Audit Committee

Write a template for the quarterly Audit Committee report on whistleblower and ethics hotline activity. The report should cover: number of reports received by category (fraud, harassment, safety, other), reports investigated vs. pending, outcomes of completed investigations (substantiated/unsubstantiated/ongoing), any matters referred to external counsel, and management's recommended actions. Keep individual cases anonymous.

#### #0021 — Board Retreat Agenda Design

Design a full-day board retreat agenda focused on 3-year strategic planning. The retreat has 8 board members and 4 senior management attendees. Structure the day: opening, context-setting presentations (30 min), facilitated strategic discussion (2 hours), working lunch with cross-table discussion, scenario planning workshops (2 hours), synthesis and priorities session (1 hour), and close. Include facilitator notes for each session.

#### #0022 — Anti-Bribery Board Attestation

Draft the annual anti-bribery and corruption policy attestation that board members must sign. The attestation should confirm: awareness of the company's anti-bribery policy, no known violations, disclosure of any gifts or hospitality received above the policy threshold, and commitment to report any suspected violations. Include a declaration clause and signature block. Reference UK Bribery Act and FCPA principles.

#### #0023 — D&O; Insurance Board Briefing

Write a 1-page briefing for new board directors explaining what D&O; (Directors & Officers) liability insurance covers, what it does not cover, what behaviors could invalidate coverage, and what the board should know about the company's current policy limits and any exclusions. Plain language, no legal jargon. The audience is an experienced executive joining a board for the first time.

#### #0024 — Board Calendar Annual Planning Template

Create an annual board meeting calendar template for a private company. Include 6 regular board meetings, 4 audit committee meetings, 3 compensation committee meetings, 2 nominations committee meetings, and 1 annual board retreat. For each meeting type, list the standard agenda items, required pre-reads, and who is responsible for preparing materials. Format as a month-by-month table for a January-December year.

#### #0025 — CEO Evaluation Framework for Board

Write the CEO performance evaluation framework for a board to use in its annual assessment of the CEO. Cover 5 dimensions: financial performance vs. plan, strategic execution, leadership and talent development, stakeholder relations, and board partnership. For each dimension, provide 3 evaluation criteria and a rating scale (1-5). Include a summary scoring section and qualitative narrative template.

#### #0026 — Board Observer Rights Agreement Summary

A PE investor is requesting board observer rights as part of their term sheet. Write a 1-page briefing for the board explaining: what observer rights are, what rights they do and don't grant, the standard limitations (no voting, can be excluded from executive session, confidentiality obligations), and what the board should negotiate for. Give a recommendation on whether to grant observer rights and under what conditions.

#### #0027 — Related Party Transaction Policy

Draft a related party transaction policy for a publicly traded company. The policy should define what constitutes a related party and a related party transaction, establish pre-approval thresholds (Audit Committee approval for transactions above \$120K annually), require disclosure in proxy statements, and include a process for determining whether a transaction is at arm's length. Cite applicable SEC rules.

#### #0028 — Board Communication Protocol

Create a board communication protocol that defines: how and when management communicates with individual board directors outside of formal meetings, what information can be shared informally vs. requires full board notification, how directors should raise concerns between meetings, the role of the board chair in managing communications, and what constitutes a material event requiring immediate disclosure. This is for a PE-backed company preparing for an IPO.

#### #0029 — Nomination Committee Search Brief

Write a candidate search brief for a new independent board director. The company is a \$200M revenue B2B healthcare AI company. The board has identified a gap in regulatory and government affairs expertise. The brief should cover: role purpose, specific skills and experience required, relevant regulatory background (FDA, CMS, EU MDR), time commitment, compensation, diversity considerations, and process timeline for a 4-month search.

### #0030 — Board Financial Literacy Assessment

Design a 10-question financial literacy self-assessment for incoming board directors who do not have a finance background. The questions should test understanding of: reading a P&L; vs. balance sheet, understanding cash flow vs. profit, what EBITDA is and its limitations, how to read an audit opinion, what a material weakness is, and basic capital structure concepts. Include answer explanations.

### #0031 — Annual General Meeting Script

Write the chairperson's full script for an AGM of a FTSE 250 company. The meeting has 200 shareholders attending in person. The agenda includes: approval of annual report and accounts, re-election of 4 directors, approval of the remuneration report, appointment of auditors, and authority to allot shares. Include how to handle a shareholder who wants to make a statement not on the agenda.

### #0032 — Board Cyber Incident Response Protocol

Write the board-level cyber incident response protocol for a financial services company. The protocol should define: the threshold that triggers board notification (materiality criteria), who notifies the board and how (CEO, CISO, within X hours), what information is required in the initial notification, the board's oversight role during the incident, and the post-incident review process including board debrief.

### #0033 — Board Information Security Policy Oversight Checklist

Create a 20-item board oversight checklist for cybersecurity governance. For each item, note: the question the board should ask management, what a satisfactory answer looks like, and what red flags indicate governance gaps. Cover: CISO reporting line, cyber budget adequacy, incident response testing, cyber insurance adequacy, third-party vendor risk, board-level cyber expertise, and regulatory compliance status.

### #0034 — Succession Planning Board Discussion Guide

Write a discussion guide for the board's annual talent and succession review. The guide should structure the board's review of: CEO succession readiness (internal candidates, external search preparedness, emergency succession), CFO succession, other C-suite critical roles, talent pipeline depth assessment, and key person dependency risks. Include facilitation prompts for each section.

### #0035 — Board Effectiveness Review Survey

Design a 25-question board effectiveness survey for annual use. Questions should cover: board composition and balance of skills, quality of information provided to the board, effectiveness of board discussions, board-management relationship, committee effectiveness, board leadership and culture, and individual director contribution. Use a 5-point Likert scale plus 3 open-ended questions. Include a scoring methodology.

### #0036 — Stakeholder Engagement Report for Board

Write a template for the annual stakeholder engagement report that management presents to the board. The report should cover: key stakeholder groups (employees, customers, investors, regulators, communities), how the company engaged each group during the year, key issues raised, how management responded, and what the board should know about material stakeholder risks and opportunities. Format as a structured board-level document.

### #0037 — Board Travel and Expense Policy

Draft a board director travel and expense policy. Cover: business class travel thresholds (flights over X hours), approved hotel rate limits, per diem for meals, what requires pre-approval, expense submission deadlines, what is not reimbursable, and the approvals process. Note that board members are not employees and the policy should respect their independent status while ensuring good governance.

#### #0038 — Private Company Dividend Policy Resolution

A PE-backed company is establishing its dividend policy for the first time ahead of a potential IPO in 18 months. Write the board resolution establishing the dividend policy, including: the company's intention regarding dividends, the factors the board will consider in making dividend decisions, whether a progressive or fixed payout policy is preferred, and the declaration process. Include a provision that the policy may be reviewed ahead of the IPO.

#### #0039 — Board ESG Oversight Committee Charter

Draft a board-level ESG oversight committee charter for a consumer goods company. Cover: committee purpose (oversight of ESG strategy, targets, reporting, and regulatory compliance), membership (minimum 2 independent directors), responsibilities (reviewing annual ESG report, setting ESG targets, overseeing climate risk), meeting frequency (quarterly), and reporting to the full board. Include a provision for external ESG auditor engagement.

#### #0040 — Board AI Governance Policy

Write a board-level AI governance policy for a company that has deployed AI in its hiring, customer service, and credit underwriting processes. The policy should establish: the board's oversight responsibility for AI risk, the roles of management (CAIO, CRO, Legal) in AI governance, AI risk classification criteria, pre-deployment approval requirements, ongoing monitoring standards, and the policy review cycle. Reference EU AI Act risk tiers.

#### #0041 — Executive Session Protocol

Write the executive session protocol for a board — the portion of board meetings held without management present. Cover: when executive sessions are held (minimum frequency), who chairs them (lead independent director), what is discussed (CEO performance, sensitive matters, auditor concerns), how decisions from executive sessions are communicated back to management, and how to handle a situation where the CEO needs to be informed of something sensitive from the session.

#### #0042 — Board Induction Program Design

Design a comprehensive 6-week induction program for a newly appointed independent board director joining a listed technology company. Week-by-week: what they meet (CEO, CFO, each C-suite member, external auditor, key advisors), what documents they read (board papers, annual report, governance framework, committee charters), what sites they visit, what training they complete (D&O; briefing, sector deep-dive, committee-specific training), and what questions they should be able to answer confidently by week 6.

#### #0043 — Board Approval Matrix

Create a board approval matrix for a mid-size private company (\$300M revenue). The matrix should specify what requires: full board approval, audit committee approval, compensation committee approval, CEO approval, and CFO approval. Cover: capex decisions (by threshold), acquisitions, disposals, new debt facilities, executive hiring and termination, new equity issuance, material contracts, related party transactions, and governance policy changes. Format as a clear table.

#### #0044 — Board Chair Year-End Report

Write the board chair's year-end report to shareholders (for inclusion in the annual report). The report should cover: how the board performed its oversight role during the year, key decisions made, changes in board composition, board effectiveness review findings and actions, how the board engaged with shareholders, and the board's assessment of the company's long-term prospects. Max 600 words. The tone should be transparent and accountable — not a PR piece.

#### #0045 — Board Retreat Follow-Up Action Plan

The board just completed a 1-day strategic retreat. The following themes emerged from the discussion (raw notes): need to accelerate international expansion; concern about management team depth below C-suite; AI investment seems underfunded vs. peers; ESG reporting is behind competitors; board itself lacks digital/AI expertise. Write the structured post-retreat action plan: for each theme, define the action, the owner (board vs. management), the timeline, and the next review milestone.

#### #0046 — Audit Partner Rotation Planning

The company's lead audit partner has been in the role for 5 years and must rotate under PCAOB rules within 2 years. Write a briefing for the Audit Committee on: the audit partner rotation requirements, the recommended process for managing the transition, what the Audit Committee should ask the outgoing partner, how to evaluate the incoming partner, and what risks to monitor during a partner transition year. Include a 12-month transition timeline.

#### #0047 — Board Communication During M&A; Process

Write the board communication protocol to be used during a live M&A; process (sell-side). The protocol should define: who on the board is on the process committee (typically 2-3 independent directors), how and when the full board is updated, what information can be shared in written vs. verbal-only form, how to handle leaks or premature disclosure, director confidentiality obligations, and the decision-making process when a final term sheet is received.

#### #0048 — Board Conflict of Interest Register

Design a board conflict of interest register template. The register should capture: director name, the potential conflict (nature and counterparty), date disclosed, how assessed (actual/potential/perceived), board decision (approved with conditions/recused/no conflict), review date, and signature of the Company Secretary confirming proper process. Include 3 example entries with different conflict types to illustrate how the register works in practice.

#### #0049 — Board Diversity & Inclusion Reporting

Write the board diversity section for an annual report. The company has a 9-person board: 3 women (33%), 2 directors from ethnic minority backgrounds (22%), age range 46-71, tenure range 1-8 years. The company has set a target of 40% women and 25% ethnic minority representation by 2027. Write the disclosure narrative, the diversity table, the progress against targets, and the board's statement on why diversity matters to governance quality.

#### #0050 — Director Disqualification Check Protocol

Write a pre-appointment director due diligence protocol. Before appointing any new board director, the company must conduct background checks. The protocol should specify: the checks to be conducted (disqualification register, insolvency history, regulatory sanctions, criminal record check, directorship history, credit check), who conducts them, what findings would prevent appointment, and how findings are disclosed to the full board. Include a sign-off form.

#### #0051 — Board Approval for AI System Deployment

Write the board resolution template for approving the deployment of a high-risk AI system (as defined under EU AI Act Article 6). The resolution should: confirm the system has been classified under the correct risk tier, reference management's pre-deployment impact assessment, note the compliance steps completed, authorize deployment subject to ongoing monitoring conditions, and require a 6-month post-deployment review report to the Audit Committee.

#### #0052 — Emergency Board Meeting Convening Notice

Write the formal convening notice for an emergency board meeting to be held with 24 hours notice. The meeting is to address: a significant cybersecurity incident that may be a notifiable data breach, and an urgent trading update required by market disclosure rules. The notice must state the legal basis for short notice, the agenda items, the meeting format (virtual), quorum requirements, and attach the draft trading update for board review.

### #0053 — Board Oversight of Climate Risk

Write the board climate risk oversight framework for a manufacturing company with Scope 1, 2, and 3 emissions. The framework should define: the board's climate governance structure (which committee leads), management's accountability (CEO, CFO, Chief Sustainability Officer), how climate risk is integrated into the enterprise risk register, the scenario analysis requirements (TCFD), and the board's reporting obligations to shareholders and regulators. Include an annual review cycle.

### #0054 — Director Remuneration Report

Write the directors' remuneration report section of an annual report. Include: the remuneration committee's statement of the policy applied, a table of each executive director's total compensation (salary, bonus, LTIP, pension, benefits, total), comparison to employee pay increases, explanation of why bonuses were paid at the level they were, performance conditions for equity awards, and CEO pay ratio disclosure. The numbers are fictional but the format must be accurate.

### #0055 — Board Shareholder Rights Plan Briefing

Brief the board on adopting a shareholder rights plan (poison pill). Cover: what it is and why companies adopt them, the specific trigger threshold proposed (typically 15-20%), the duration and renewal terms, how it affects existing shareholders, the legal basis, proxy advisor and investor reaction expectations, and how to communicate the adoption to shareholders without appearing defensive. Include the board resolution language.

### #0056 — Director Conflict Register Update

A board director has just disclosed a new potential conflict: their family office has acquired a 6% stake in a company we are considering as an acquisition target. Draft the entry for the conflict register, the disclosure letter to the full board, the recusal protocol for all discussions related to the target, and the audit committee memo documenting how the conflict was handled.

### #0057 — Audit Finding Response Letter

Write the management response letter to the external auditor's management letter. The auditor identified 3 findings: (1) revenue recognition for multi-year contracts lacked documented reviews, (2) IT access reviews were not completed quarterly as required by policy, (3) expense reimbursements over \$5,000 did not always have receipts. For each finding, write the management response: acknowledgment, root cause, remediation action, responsible owner, and completion date.

### #0058 — Related Party Transaction Approval

Draft the related party transaction approval memo for the audit committee. The CFO's spouse is the founder of a marketing agency that has been asked to bid on a \$250K contract. The agency is the most qualified bidder based on the RFP. Write the memo documenting: the conflict, the process by which the CFO was recused, the competitive bid process, the audit committee's independent review, and the approval (or rejection) with rationale.

### #0059 — Board Technology Committee Charter

Draft a charter for a new Board Technology Committee. The company is a financial services firm with significant technology risk. Cover: purpose (oversight of technology strategy, cybersecurity, and AI governance), membership (minimum 2 independent directors with technology backgrounds), responsibilities (reviewing technology investment above \$5M, overseeing cybersecurity posture, AI governance), meeting frequency (quarterly), and reporting structure. Include a provision for management to brief the committee on emerging technology risks at each meeting.

### #0060 — Director Education Program

Design the annual director education program for a 9-member board. The program should include 4 topics (one per quarter): AI and emerging technology (by internal CAIO and external expert), cybersecurity (by CISO with tabletop exercise), regulatory outlook for our industry (by external regulatory counsel), and executive compensation trends (by external compensation consultant). For each session, define the format (2-hour briefing), pre-reading materials, and the questions the board should be able to answer after the session.

### #0061 — Whistleblower Investigation Protocol

Write the investigation protocol for a whistleblower complaint received through the ethics hotline. The complaint alleges financial statement manipulation by the controller. The investigation protocol must cover: who conducts the investigation (external counsel, not internal — this is a financial fraud allegation), who is notified (audit committee chair, not management — the alleged perpetrator is management), how the complainant is protected, how the investigation is documented, what triggers SEC notification, and how the board is updated throughout. This is a sensitive, high-stakes situation.

### #0062 — Board Approval for Major IT Investment

Write the board approval memo for a \$12M ERP system replacement. The memo should cover: why replacement is necessary (the current system is 15 years old and cannot integrate with AI tools), the selection process (competitive RFP, 3 vendors evaluated), the selected vendor and rationale, the implementation plan (18 months, 3 phases), total cost of ownership (license, implementation, training, ongoing support), the risks (implementation delays are common with ERP projects, budget overruns average 40%), and the specific board approval requested.

### #0063 — Board Communication on CEO Health

Write the board protocol for managing a situation where the CEO has disclosed a serious health condition privately to the board chair. The CEO is requesting 90 days of medical leave but wants the disclosure managed carefully. The protocol should cover: the board's legal obligations (what must be disclosed publicly and when?), the interim leadership plan, the communication to the senior leadership team, the external communication (to investors, if the CEO is public company), and the criteria for determining whether the board needs to make a governance change.

### #0064 — Quarterly Board Self-Reflection Questions

Write the 10 questions a board should ask itself at the end of each board meeting to assess its own effectiveness. The questions should cover: quality of preparation (did directors come prepared?), quality of discussion (were the right issues surfaced?), management of time (was time spent on the right topics?), decision quality (were decisions made with the right information?), board dynamics (did all voices contribute?), and action follow-through (were actions from the last meeting completed?). These are for private board reflection, not formal reporting.

### #0065 — Independent Director Recruitment Pitch

Write the pitch to recruit an exceptional candidate as an independent board director. The candidate is a former Fortune 100 CTO, currently advising 3 AI startups. The pitch should: make the case for why this specific person is needed (their AI expertise fills a critical board gap), describe what the role involves honestly (time commitment, fiduciary responsibilities, committee work), explain the compensation (director fees, equity, travel), and address the 'why should I?' question by connecting the candidate's expertise to the company's strategic moment. This letter goes from the board chair to the candidate.

### #0066 — Board Approval of Equity Plan

Write the board resolution and memo approving the company's 2026 equity incentive plan. The plan includes: a new share pool of 15% of fully diluted shares, standard vesting terms (4 years, 1-year cliff), early exercise rights for employees, and an annual refresh of 2% of fully diluted shares. The memo should explain the dilution impact, compare to market benchmarks for equity plan size, note the ISS/Glass Lewis proxy advisor implications if the company is publicly traded, and include the specific resolution text for the board minutes.

#### #0067 — Board Agenda Prioritization

You are the board chair. Write a memo to management explaining how to prioritize agenda items for board meetings. Principle: strategy and risk belong at the top; operational reviews belong in consent agendas or pre-reads. Include specific examples of items that should be moved from discussion to consent.

#### #0068 — Director Independence Review

Perform the annual director independence review. Seven directors are on the board. Two are executives (not independent by definition). Of the five non-executives: one has a consulting relationship with the company worth \$80K/year; one is a partner at the company's law firm; one has no commercial relationship. Write the independence analysis and conclusion for each.

#### #0069 — Equity Award Approval Process

Draft the board resolution approving equity awards to employees below the VP level. The board has delegated authority to the CEO to approve awards within pre-approved ranges: up to 0.05% of shares for senior staff, up to 0.02% for mid-level staff. Write the delegation language, the reporting requirement, and the conditions under which delegation is revoked.

#### #0070 — Board Onboarding Reading List

Create the onboarding reading list for a new board director. The list should include: the company's last 3 annual reports, the board governance guidelines, the committee charters, the company's top-10 risk register, the competitive landscape overview (2-pager from strategy team), and the 5 most important analyst reports on the sector. Add 3 recommended books on board governance.

#### #0071 — Board Approval: New Business Line

Write the board approval memo for entering a new business line — AI-powered compliance monitoring as a service. The company currently sells compliance software. The new service requires 15 additional headcount, \$4M in product development, and will target the financial services sector. Write the business case, risks, success criteria, and approval request.

#### #0072 — Board Diversity Disclosure

Draft the board diversity disclosure for the annual proxy statement. The board has 9 directors: 4 women, 5 men; 2 directors identify as racial/ethnic minorities; age range 42–71; international experience in 4 countries. Write the disclosure in the format required for public company proxy statements, including the skills matrix table.

#### #0073 — Board Chair–CEO Relationship Framework

Write the framework for the board chair–CEO relationship at a company where the chair and CEO are separate roles. Cover: the division of responsibilities (chair leads board, CEO leads company), how the chair supports the CEO without undermining management, communication cadence, the protocol for when the board chair needs to address an issue with the CEO, and the succession planning implication.

#### #0074 — Board Meeting Minutes Standards

Write the board meeting minutes standards. Good minutes capture: decisions made (not the full debate), key concerns raised, votes and abstentions, recusals and their basis, and action items with owners and dates. Bad minutes transcribe everything. Write the standard with an example good minutes excerpt and an example bad minutes excerpt for the same discussion.

#### #0075 — Annual Board Effectiveness Review

Design the annual board effectiveness review process. The review should: assess the board as a whole (is the board doing its job well?), assess individual directors (are all directors contributing?), and assess board-management interaction (is the board adding value to management?). Write the survey instrument, the facilitated discussion guide, and the report format for the results.

#### #0076 — Board Approval: Major Customer Contract

Write the board approval memo for a customer contract that exceeds the CEO's contracting authority. The contract is a 5-year, \$45M agreement with a global bank. Key terms: the company is granting the customer source code escrow rights, a right of first refusal on the company's next product line, and a penalty of \$5M for any SLA breach above 0.1% downtime. Explain the risks and recommend approval or modification of terms.

#### #0077 — Board Strategy Session Design

Design the annual board strategy session. This is a full-day off-site, separate from regular board meetings. Morning: competitive landscape and external environment (management presents, board challenges). Afternoon: 3-year strategic priorities (board and management co-develop). Evening: dinner with senior management team (relationship building). Include the pre-read list, the facilitation approach, and the desired output of the session.

#### #0078 — Board Approval: Dividend Policy

Write the board resolution establishing a dividend policy. The company is cash-flow positive with \$80M cash and no immediate acquisition targets. The proposed policy: a quarterly cash dividend of \$0.15/share (approximately \$12M/year, or 35% of net income), with a commitment to review annually. Write the resolution, the payout ratio analysis, and the investor communication.

#### #0079 — Crisis: Board Notification Protocol

Write the board notification protocol for a crisis. Define 3 tiers: Tier 1 (immediate notification within 2 hours — cybersecurity breach, executive arrest, material litigation, M&A; approach), Tier 2 (next business day — significant customer loss, key employee departure, regulatory inquiry), Tier 3 (next board meeting — general operational issues). Write the notification format for Tier 1 and Tier 2 events and the escalation path if the board chair is unreachable.

#### #0080 — Board Compensation Philosophy Statement

Write the board's compensation philosophy statement. The company wants to attract executives who are motivated by long-term value creation, not short-term income. Key principles: pay competitively but not at the top of the market; emphasize equity over cash; align vesting to multi-year outcomes; penalize for risk-taking that damages stakeholders. Translate each principle into specific plan design implications.

#### #0081 — Board Approval: Key Person Life Insurance

Write the board resolution approving key person life insurance policies on the CEO and CTO. Policy amounts: \$10M on CEO, \$5M on CTO. Rationale: both individuals are critical to the company's AI product development, which accounts for 70% of revenue. Include the premium cost, the carrier selection process, and the board's rationale for the coverage amounts.

#### #0082 — Board Oversight of Regulatory Risk

Write the framework for board oversight of regulatory risk. The company operates in 12 countries with complex regulatory environments (financial services, health data, AI regulation). The framework should: assign regulatory oversight to the audit committee, require management to present a regulatory risk register quarterly, define the threshold for a regulatory risk requiring full board awareness, and establish the protocol for regulatory enforcement actions (immediate board notification, independent counsel engagement).

#### #0083 — Board-Level Succession Readiness Test

Write the succession readiness test for the board to evaluate their emergency succession preparedness. The test poses a scenario: the CEO is incapacitated tonight. Answer 10 questions: Who becomes interim CEO? What is the first communication the board chair sends? Who calls the CFO? What does the board know about the candidates to replace the CEO permanently? What is the expected timeline to permanent hire? Use the answers to identify succession planning gaps.

#### #0084 — Governance Audit Preparation

Write the preparation guide for an external governance audit. The audit is conducted by an institutional investor's governance team before a major investment decision. The audit will review: board composition, committee structures, executive compensation, shareholder rights, audit quality, related party transactions, and environmental/social governance. Write the internal preparation checklist and assign the document collection responsibility to specific executives.

#### #0085 — Board Communication on Restructuring

Write the board's communication to employees about a company restructuring. The CEO will announce the restructuring to all employees tomorrow. The board has approved: a 12% workforce reduction (150 employees), closure of 2 offices (London and Singapore), and a strategic pivot to focus on 2 product lines instead of 4. The board communication (separate from the CEO's message) should: affirm the decision, explain the board's oversight role, and express confidence in the leadership team's execution.

#### #0086 — Board Meeting Facilitation Guide

Write the facilitation guide for the board chair running a 3-hour board meeting with 12 attendees. The meeting has 5 agenda items. The guide should cover: how to open the meeting and set the tone, how to manage a director who dominates discussion, how to ensure quieter directors contribute, how to call a vote when consensus is not reached, how to handle an unexpected issue raised from the floor, and how to close the meeting with clear actions.

#### #0087 — Shareholder Activism Response Plan

Write the shareholder activism response plan for a company that has received a letter from an activist hedge fund (3.2% ownership) demanding: two board seats, a \$50M share buyback, and strategic alternatives review. The plan covers: the first 48 hours (legal counsel engaged, internal communications lockdown), the assessment phase (what does the activist actually want?), the negotiation strategy (what can we offer without damaging the company?), and the proxy fight preparation if negotiation fails.

#### #0088 — Board Role in Innovation

Write the framework for the board's role in supporting and governing innovation. Boards often either rubber-stamp innovation proposals (adding no value) or block them (adding negative value). The right model: the board challenges the strategic logic of innovation investments, ensures innovation is adequately resourced, monitors progress against innovation KPIs, and creates safety for management to report innovation failures honestly. Include specific questions the board should ask management at each stage of an innovation initiative.

#### #0089 — Nomination Committee Best Practices

Write the nomination and governance committee's annual work plan. The committee's responsibilities: board composition and diversity, director recruitment, director education, succession planning (CEO and key executives), governance policy review, and ESG oversight. Write the committee's 12-month work plan with specific deliverables for each quarter, the committee chair's responsibilities, and the management support required.

#### #0090 — Board Approval: Customer Data Sharing

Write the board approval memo for entering a data sharing agreement with a strategic partner. The company will share anonymized usage data with an AI research lab. The data covers 500,000 users. The research lab will use the data to train AI models. Key issues: what consent do users have for this use? What are the re-identification risks? What contractual protections are in place? What is the regulatory compliance status in each jurisdiction? Recommend approval, conditional approval, or rejection.

#### #0091 — Director Engagement Requirements

Write the director engagement requirements. Beyond attending board meetings, effective directors should: spend 2-4 hours per month on company matters outside meetings, attend at least one company event (customer conference, employee all-hands) per year, complete 8+ hours of continuing education on governance topics, meet informally with the CEO for a 1:1 at least twice per year, and visit a customer or key business site annually. Write these as formal expectations in the director engagement letter.

#### #0092 — Board Governance Guidelines Review

Write the agenda and process for the annual review of the company's board governance guidelines. The guidelines should be reviewed against: NYSE/NASDAQ listing standards (if public), current best practice for the company's size and sector, any governance deficiencies identified in the past year, ISS and Glass Lewis policy updates (if public), and the governance policies of peer companies. Output: a redline of the governance guidelines with proposed changes and the rationale for each change.

#### #0093 — Special Committee Establishment

Write the board resolution establishing a special committee to evaluate a potential sale of the company. The committee should: be composed entirely of independent directors (3 directors named), have authority to engage its own legal and financial advisors independent of management, receive a mandate to evaluate all strategic alternatives (not just the current offer), and report to the full board with a recommendation. Include the committee's scope limitation (advisory only, full board decides).

#### #0094 — Board Approval: Debt Refinancing

Write the board approval memo for refinancing \$120M of senior secured debt. Current terms: 7.5% interest, maturing in 18 months. Proposed new terms: 5.8% interest, 7-year maturity, covenant-lite. Annual interest savings: \$2.04M. The primary risk: the new debt has a floating rate component (SOFR + 200bps). Write the refinancing rationale, the risk analysis, and the approval motion.

#### #0095 — Board Member Offboarding

Write the board member offboarding process for a director who is not being renominated. The process should cover: the notification conversation (board chair delivers the message), the transition period (director serves through the end of current term), the knowledge transfer (outgoing director briefs the incoming director), the public disclosure (proxy statement language), and the alumni relationship (how to maintain a positive relationship with the departing director).

#### #0096 — Board Information Rights

Write the board information rights policy. What information does the board have a right to access? The policy should cover: routine information (board package materials, management reports), special access (directors can request meetings with any senior employee without going through management), third-party access (board can commission independent assessments), information confidentiality obligations (directors may not share board materials outside appropriate channels), and the protocol for a director requesting access that management is resisting.

#### #0097 — Corporate Governance Rating Improvement

Write the action plan for improving the company's corporate governance rating from ISS or Glass Lewis. Current scores: ISS QualityScore 5 (on a scale of 1–10, lower is better). Areas flagged: excessive CEO compensation, lack of majority voting in director elections, classified board structure, limited shareholder rights. Write the governance improvement plan prioritizing the changes that will have the most impact on governance scores, with a 24-month timeline.

#### #0098 — Board Risk Appetite Statement

Write the board's risk appetite statement. The statement should define: the types of risk the company will take deliberately (innovation risk, competitive risk), the types of risk the company will actively manage to minimize (reputational risk, regulatory risk), the types of risk the company will not accept under any circumstances (ethical breaches, safety risks, material fraud), and the quantitative risk thresholds (maximum single-event loss the company can absorb, maximum liquidity risk, maximum leverage ratio).

#### #0099 — Board Technology Assessment Request

Write the board's formal request to management for a technology risk assessment. The board has become concerned that the company's core technology infrastructure is aging and creating strategic risk. The request should specify: what the assessment should cover (infrastructure age and scalability, cybersecurity posture, AI readiness, technical debt), who should conduct it (recommend an external party for objectivity), the timeline (90 days), and the format for reporting findings to the board.

#### #0100 — Director Fee Structure Benchmark

Write the analysis benchmarking the company's director fee structure against peers. Current fees: \$60K annual retainer, \$10K per committee membership, \$20K committee chair premium, no equity. Market data for comparable companies (\$200-500M revenue): median annual retainer \$75K, equity grant of \$100-150K in RSUs, committee fees \$15-20K. Write the recommendation for the new fee structure and the compensation committee memo supporting the change.

#### #0101 — Board Audit Committee Charter Review

Review and update the audit committee charter. The audit committee oversees financial reporting, internal controls, and the external audit relationship. The updated charter should reflect: the new PCAOB inspection findings (if public), the addition of AI governance to the audit committee's scope, the requirement that at least one audit committee member qualifies as an 'audit committee financial expert' under SEC rules, and the updated meeting frequency (minimum 4 times per year, plus executive sessions without management).

#### #0102 — Independent Director Evaluation

Design the individual director evaluation process for the annual governance review. The evaluation should assess: preparation and participation, committee contribution, independence judgment, understanding of the business, relationships with management (sufficient trust but not captured), and personal conduct. The evaluation is conducted by the governance committee chair via structured 1:1 conversation with each director (not a survey — conversations surface nuance that surveys miss). Write the conversation guide.

#### #0103 — Board Committee Report Format

Write the standard format for committee reports to the full board. Each committee (audit, compensation, nomination/governance) reports to the full board at each meeting. The report should cover: what the committee did since the last board meeting, the key issues discussed, the decisions made (and the votes), the items escalated to the full board for approval, and upcoming committee activities. Maximum 1 page per committee. Write the template.

#### #0104 — ESG Board Oversight Policy

Write the board's ESG (Environmental, Social, Governance) oversight policy. The board assigns ESG oversight responsibility: Environmental (assigned to a dedicated ESG committee or the full board), Social (assigned to the compensation or nomination committee), Governance (remains with the full board). The policy should define: the reporting cadence (management reports ESG metrics quarterly), the materiality assessment process (what ESG issues are material to investors?), and the disclosure requirements (what the company discloses in the annual report and proxy statement).

#### #0105 — Director Conflict of Interest Training

Write the annual conflict of interest training module for board directors. The training should cover: the legal definition of a conflict (duty of loyalty), the disclosure obligation (when must a director disclose a potential conflict?), the recusal obligation (when must a director recuse from a vote?), the process for documenting conflicts in the conflict register, and 5 scenario exercises (a director's consulting firm is bidding for a company contract; a director's portfolio company is a potential acquisition target; a director has a personal relationship with an executive candidate; a director is negotiating a joint venture with the company on behalf of their employer; a director's family member was hired as a vendor).

#### #0106 — Investor Communication Policy

Write the investor communication policy for the company. The policy should cover: who is authorized to speak with investors (CEO and CFO only — no other executives without explicit approval), the blackout period before earnings (no non-public information shared in the 2 weeks before earnings), the Reg FD compliance process (if public — what happens when material non-public information is inadvertently disclosed?), the process for responding to unsolicited investor inquiries, and the log of investor communications maintained by the IR function.

#### #0107 — Board Approval: Strategic Alliance

Write the board approval memo for a strategic alliance with a Fortune 500 company. The alliance includes: joint product development, co-marketing rights, and a \$10M investment by the Fortune 500 partner in exchange for a 5% stake and a right of first refusal on acquisition. The board memo should: describe the strategic rationale, the financial terms, the governance implications of a 5% investor with special rights, the potential conflict of interest (the partner operates in an adjacent market), and the approval recommendation.

#### #0108 — Board Role During M&A; Process

Write the board's protocol for managing the M&A; process when the company is being sold. The board's role: fulfill the fiduciary duty to maximize shareholder value (but also consider employees, customers, and community), oversee the selection of investment bankers and legal advisors, ensure a fair process (competitive auction or structured process), evaluate the final offers, and approve the transaction. The protocol should address: how the board is briefed (executive sessions without management), management's potential conflicts (management wants to retain jobs post-acquisition), and the shareholder vote process.

#### #0109 — Audit Finding Escalation Protocol

Write the audit finding escalation protocol. Not all audit findings require immediate board notification — escalation should be proportionate to severity. Define 3 tiers: Tier 1 (immediate notification to audit committee chair within 24 hours — material weakness in internal controls, potential fraud, regulatory violation), Tier 2 (next audit committee meeting — significant deficiency, process control weakness, compliance gap), Tier 3 (annual audit report — minor process improvements, low-risk recommendations). Write the criteria for each tier and the format for the escalation notification.

#### #0110 — Board Review of Executive Compensation

Write the compensation committee's annual executive compensation review process. The review should: benchmark the CEO's total compensation against a peer group (15 comparable companies by size and sector), assess the alignment of compensation structure to shareholder interests (is pay tied to long-term value creation?), evaluate say-on-pay proxy results from the prior year (if public), review the annual incentive plan payout (was the payout calibrated to actual business performance?), and approve the CEO's compensation for the coming year.

#### #0111 — Board Succession Planning Update

Write the annual succession planning update format for the board. The update should cover: CEO emergency succession (who takes over tonight if the CEO is incapacitated?), CEO planned succession (the 3-year succession plan and the readiness of internal candidates), key executive succession (VP+ roles with succession gaps), board succession (which director seats need to be refreshed in the next 2 years and what skills are being sought?), and the action plan for the top 2 succession gaps.

#### #0112 — Board Oversight of Culture

Write the board's approach to culture oversight. Culture is increasingly recognized as a board-level governance issue — culture failures (ethical breaches, toxic work environments) create material risk. The board's oversight mechanisms: annual employee culture survey results reported to the board, board access to a rotating 'skip-level' conversation with senior employees (2-3 per year, not managed by the CEO), review of whistleblower report statistics (trends indicate culture health), and the CEO's culture narrative challenged by the board annually.

#### #0113 — Director Information Security Obligations

Write the board director information security obligations policy. Directors receive and handle highly sensitive information (M&A; plans, financial results pre-announcement, personnel decisions). The policy should: prohibit storage of board materials on personal devices without encryption, require use of the company's secure board portal (not email) for sensitive materials, prohibit sharing of board materials with any third party (including the director's employer), require immediate notification if a device containing board materials is lost or compromised, and specify the training requirement for directors on information security.

#### #0114 — Board Approval: Executive Hire

Write the board approval process for hiring a new C-suite executive. The board typically approves CEO, CFO, and General Counsel (and sometimes CTO for technology companies). The approval memo should include: the business rationale for the hire (why now, why this role?), the search process (executive search firm engaged, candidate pool description), the finalist assessment (how were finalists evaluated?), the recommended candidate's background and compensation package, the reference check summary, and any concerns or conditions attached to the approval.

#### #0115 — Corporate Governance Annual Report

Write the corporate governance section of the annual report. The section should describe: the board's composition and qualifications, the board's oversight structure (committees and their roles), the board's 2025 activities (major decisions, strategy sessions, oversight activities), the executive compensation philosophy, the shareholder engagement activities, and the governance improvements made during the year. Length: 4-6 pages. Audience: institutional investors and proxy advisors who will use this to make voting decisions.

#### #0116 — Board Approval: Office Lease

Write the board resolution approving a new 10-year office lease. The company is moving its headquarters to a larger space. Key terms: 15,000 square feet, \$85/sqft/year = \$1.275M/year, \$12.75M total commitment, 10% annual escalation cap. The board memo should: explain why the company is moving (current space is insufficient for planned headcount growth), evaluate the alternatives considered (other spaces, co-working, buying vs. leasing), analyze the financial commitment against the company's current and projected revenue, and recommend approval or modification.

### #0117 — Director Q&A; on Financial Results

Write the preparation guide for board directors who want to engage substantively with financial results at the quarterly board meeting. Directors should be able to ask insightful questions that add value, not just receive information passively. Question areas: revenue quality (is this growth sustainable or driven by one-time items?), margin trajectory (what is driving margin improvement or compression?), cash conversion (why is cash generation lagging earnings?), balance sheet health (any concerns about liquidity?), and forward guidance (what assumptions underlie the forecast?). Write 5 questions for each area.

### #0118 — Board Vendor Management Oversight

Write the framework for board oversight of critical vendor relationships. The board does not manage vendors — that is management's job. But the board should oversee the risk that a critical vendor failure could materially harm the company. The framework should: require management to identify the top 10 critical vendors annually, assess the risk of vendor failure for each (financial health, concentration risk, contractual protections), and report to the audit committee on vendor risk mitigation actions. Board escalation: if a critical vendor shows serious financial distress, the audit committee chair is notified immediately.

### #0119 — Annual Board Performance Review

Write the annual board performance review report format. This is the formal output of the board effectiveness review process. Sections: Board composition and skills assessment (does the current board composition match the company's strategic needs?), Board process quality (are meetings effective? is the board receiving the right information?), Board-management relationship quality (is the board appropriately engaged without micromanaging?), Committee effectiveness (are the committees doing their jobs well?), and Individual director assessments (summary, not individual director scorecards, which are kept confidential). Share with the full board and the CEO.

### #0120 — Board Chair Communication Standards

Write the board chair's communication standards. The board chair sets the tone for board governance. Standards should cover: pre-meeting communication (board chair sends a personal note to directors 1 week before each meeting with the most important question to be resolved), director engagement (board chair maintains quarterly contact with each director between meetings), management relationship (board chair meets with CEO monthly but does not create a 'shadow management' dynamic), shareholder communication (board chair is available for conversations with major institutional shareholders), and board health (board chair surfaces and addresses interpersonal dynamics that affect board effectiveness).

### #0121 — Board Technology Risk Briefing

Write the template for the quarterly technology risk briefing to the board. The briefing should cover: critical system availability (any incidents in the past quarter?), cybersecurity posture (vulnerability assessment results, any breaches?), AI system governance (new AI systems deployed, any AI safety incidents?), technology investment progress (major technology projects status), emerging technology risks (what new technology risks is management monitoring?), and the board's questions from the prior quarter and management's responses. Maximum 6 slides. The briefing should be information-dense but narrative-light.

### #0122 — Board Meeting Consent Agenda

Write the consent agenda for a board meeting. The consent agenda bundles routine approvals that require board authorization but do not need discussion into a single vote. Items suitable for the consent agenda: minutes from the prior meeting, committee reports (for information only), routine equity grants (within delegated authority), contract renewals within approved terms, and insurance renewals. Items that should never be on the consent agenda: any item with a director requesting discussion, related party transactions, and any item over the CEO's contracting authority.

### #0123 — Board Diversity Hiring Protocol

Write the board director diversity hiring protocol. The protocol should: define diversity broadly (gender, race/ethnicity, age, geography, functional background, sector experience), establish a target for each search ('we will not finalize a shortlist without at least 2 diverse candidates'), require the use of executive search firms with demonstrated diversity placement track records, address the 'qualified diverse candidate' problem (the nomination committee should have access to a diverse candidate sourcing playbook), and set accountability for diversity progress (annual reporting of board composition vs. targets).

### #0124 — Board Communication with Employees

Write the protocol for direct board communication with employees. Most boards communicate with employees only through the CEO — creating distance and limiting the board's independent view of company culture. The protocol should: establish a board-employee communication channel (not replacing management, but supplementing it), create 2 board-facilitated employee listening sessions per year (skip-level conversations, 8-10 employees, rotating selection), give employees a channel to raise concerns directly with the board chair (separate from the ethics hotline), and publish a brief summary of what the board discussed at each quarterly meeting (appropriate level of transparency builds trust).

### #0125 — Board Oversight of AI Ethics

Write the board's AI ethics oversight framework. As AI systems increasingly make or influence decisions affecting employees, customers, and society, the board has a governance obligation. The framework should: assign AI ethics oversight to a specific committee (recommend the audit committee or a dedicated technology committee), require management to report AI ethics incidents, bias findings, and regulatory AI developments quarterly, commission an independent AI ethics assessment annually, and ensure the company's AI ethics policy is reviewed by the board annually. Include the AI ethics questions the board should ask management.

### #0126 — Board Evaluation of CEO

Write the annual CEO evaluation process. The board evaluates the CEO annually — this is one of its most important functions. The evaluation should: start with the CEO's self-assessment (what did I commit to? what did I deliver?), gather input from every board director and the CEO's direct reports (standardized questions, not free-form), assess performance against agreed strategic milestones and cultural leadership, result in a frank conversation between the board chair and CEO (not a presentation, a dialogue), and connect to the CEO's compensation review. Write the process, the evaluation question set, and the conversation guide.

### #0127 — Corporate Secretary Role and Responsibilities

Write the corporate secretary's role and responsibilities document. The corporate secretary is the board's administrative and legal advisor. Responsibilities: preparing board meeting agendas and materials, attending all board meetings and maintaining accurate minutes, maintaining the company's corporate records (charter, bylaws, board resolutions, stockholder records), managing the board portal and information security, coordinating the director onboarding process, managing the board effectiveness review process, and liaising with the company's outside counsel on governance matters. Write the role description, the annual work plan, and the governance between the corporate secretary and the CEO.

### #0128 — Investor Day Planning

Write the investor day planning guide for the company's first investor day. Investor day is a 4-6 hour event where the management team presents the company's strategy and long-term financial model to institutional investors and analysts. Planning should cover: content (what strategic story are we telling? what financial targets are we presenting?), presenters (which executives present and in what order?), Q&A; preparation (prepare for 20 specific questions analysts will ask), materials (presentation, supplemental financials, the mandatory forward-looking statement disclaimer), logistics (in-person vs. virtual, press, webcast), and post-event follow-up (recording published, transcript available within 48 hours).

### #0129 — Board Approval: New HR Policy

Write the board resolution approving the updated executive severance policy. The new policy provides: CEO — 18 months base salary + 1 year COBRA + 12-month equity acceleration on termination without cause; other C-suite — 12 months base + COBRA + 6-month equity acceleration. The memo should explain the governance rationale (competitive benchmarking, retention risk) and include the specific resolution language.

### #0130 — Board Communication Standards for AI

Write the board communication standards for disclosing AI-related material events to investors. As AI becomes core to the business, investors need timely notification of: major AI product launches, significant AI incidents, material AI regulatory actions, and changes in the AI strategy. Write the materiality threshold for each event type and the disclosure timing requirement.

### #0131 — Board Oversight: Third-Party Audits

Write the board's framework for commissioning independent third-party audits. In addition to the external financial audit, the board should have the authority to commission: cybersecurity audits (at least annually), AI governance audits (annually), regulatory compliance audits (as required), and culture and ethics audits (every 2 years). Write the governance framework for each audit type including selection of the third party and the reporting process.

### #0132 — Board Emergency Meeting Protocol

Write the board emergency meeting protocol. When a material event occurs between scheduled board meetings (cybersecurity breach, executive departure, regulatory action, unsolicited M&A; approach), the board must convene quickly. The protocol: how to call an emergency meeting (board chair notifies all directors with 24-hour minimum notice for virtual meetings), quorum requirements, the types of decisions that require an emergency meeting vs. can wait for the next scheduled meeting, and the documentation requirements.

### #0133 — Board Evaluation of CFO

Write the annual CFO evaluation guide for the board. The audit committee typically leads the CFO evaluation. Evaluation dimensions: financial reporting quality (are reports timely, accurate, and insightful?), relationship with external auditor (is the relationship appropriate — neither too cozy nor adversarial?), financial risk management (are risks identified and managed proactively?), capital allocation quality (are financial resources deployed well?), finance team leadership (is the CFO building a strong team?), and integrity (is the CFO modeling the financial reporting standards the company requires?).

### #0134 — Board Communication: Cybersecurity

Write the board-level cybersecurity incident communication protocol. When a cybersecurity incident occurs, the board needs to be informed at the right level of detail at the right time. Level 1 (within 2 hours): notification that an incident has occurred, severity classification, and whether customer data or material systems are affected. Level 2 (within 24 hours): root cause assessment, containment status, regulatory notification requirements, and customer communication plan. Level 3 (within 72 hours): full incident report including timeline, impact, regulatory filings, and remediation plan.

### #0135 — Board Charter Update Process

Write the annual board charter update process. Every 2 years, the board should review all committee charters and the board governance guidelines to ensure they reflect: changes in the company's size and complexity, new regulatory requirements, best practice evolution, and lessons from the past 2 years of board activity. The review should be led by the nominating and governance committee, involve outside counsel review, and produce a redlined set of updates for the full board to approve.

## SECTION 02

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127 unique prompts for senior executives

### #0136 — Company-Level OKR Design — CREATE Format

Context: You are the CEO of a 400-person fintech company. The company has used OKRs for 2 years but the last annual review found that 70% of KR's were marked 'complete' even though the company missed revenue target by 15%. The problem is that OKRs are set too easy to guarantee success, not to drive ambitious outcomes. Request: Redesign the company OKR framework for Q1 2026. Write 3 company-level Objectives with 3-4 Key Results each. The company's actual priorities are: accelerate enterprise customer acquisition, reduce customer churn from 12% to 8%, and ship the AI product that has been in development for 8 months. Adjustments: Each KR must be a measurable outcome, not a task. At least 2 KR's per objective should be 'stretch' targets (60-70% chance of achievement, not 90%). Include a note on the scoring methodology (0.0-1.0 scale, what constitutes success at year-end). Tone: Ambitious but realistic. These OKRs will be shared with the entire company.

### #0137 — Department OKR Cascade — CREATE Format

Context: The company OKR for Q1 is: Objective — 'Make our enterprise sales motion repeatable and predictable.' KR1: Close 10 new enterprise logos (>\$100K ACV). KR2: Achieve pipeline coverage of 3x at quarter start. KR3: Reduce average sales cycle from 110 to 85 days. Request: Cascade this company OKR into department-level OKRs for the following teams: (1) Sales, (2) Sales Engineering, (3) Marketing, (4) Revenue Operations. Each department should have 1 Objective and 2-3 KR's that directly contribute to the company OKR above. Adjustments: Department KR's must be things the department can directly control or heavily influence. Avoid creating KR's that just restate the company KR. Cross-team dependencies should be noted. Examples: A good cascaded KR for RevOps could be: 'KR2: Build and deploy the automated pipeline scoring model by Feb 15, reducing manual forecasting time by 4 hours per rep per week.' A weak cascaded KR would be: 'KR1: Support the sales team in closing enterprise deals.' The second is a task, not an outcome.

### #0138 — Individual OKR Coaching Session — CREATE Format

Context: You are an OKR coach. A VP of Engineering has come to you frustrated. Her OKRs for Q3 were: O1: 'Improve engineering velocity.' KR1: 'Ship more features.' KR2: 'Reduce bugs.' KR3: 'Improve team morale.' She scored herself 0.7 but her CEO gave her 0.3 and there was a tense conversation about it. Request: Coach this VP through rewriting her OKRs. Show her: (1) what is wrong with her current KR's and why they failed (use the criteria of measurable, outcome-oriented, achievable), (2) how to have the conversation with her CEO about the disconnect in scoring, (3) the rewritten OKRs for Q4 that would be defensible and meaningful. Tone: Coaching voice — empathetic but direct. She needs to leave the session with both new OKRs and a new understanding of how to write them. Extras: Include a simple one-page OKR quality checklist she can use going forward.

### #0139 — OKR Mid-Quarter Review Script — One-Shot

Write the script for a mid-quarter OKR review meeting for a 12-person product team. The meeting is 60 minutes. The team's OKRs from the quarter start are listed below. At the midpoint, 2 KR's are on track, 2 are at risk, and 1 is already failed. Q2 OKRs for Product Team: O1: Launch AI recommendation feature that delights enterprise customers KR1: Feature live in production for 100% of enterprise customers by May 31 — AT RISK (at 40% rollout) KR2: Achieve 70% weekly active usage among enterprise users within 60 days of launch — ON TRACK KR3: NPS for AI feature above 40 by quarter end — ON TRACK KR4: Zero P1 incidents caused by the AI feature — AT RISK (2 P1s in April) KR5: Deploy the feature to 3 named expansion accounts for upsell opportunities — FAILED (accounts not identified) Structure the meeting: opening (5 min), KR-by-KR review (35 min), resource reallocation discussion (10 min), commitments for the second half (5 min), close (5 min). Include facilitation questions for each section.

### #0140 — OKR Grading Calibration — One-Shot

Your leadership team uses a 0.0-1.0 OKR grading scale where 0.7 is considered a 'good' score (indicating the KR was sufficiently ambitious). But different leaders grade very differently — one always gives 0.9+, another always gives 0.5. Write a calibration guide for grading OKRs consistently. Include: — What each score level means (0.0, 0.3, 0.5, 0.7, 0.9, 1.0) — The 3 most common grading errors and how to correct them — A worked example: the same KR with different outcome scenarios, graded correctly Example KR for the worked example: 'Increase MQL to SQL conversion rate from 18% to 28% by end of Q2.' — Scenario A: Ended at 22% — Scenario B: Ended at 27.5% — Scenario C: Ended at 32% — Scenario D: Process changed mid-quarter, measurement became impossible Grade each scenario and explain the reasoning.

#### #0141 — Stretch Goal Setting Workshop — One-Shot

You are facilitating a 2-hour workshop to help a leadership team set genuinely ambitious OKRs for the year. The team has a history of setting safe targets. Write the complete workshop facilitation guide, including: — Opening frame: why stretch goals (15 min) — include the specific language to use to explain why 0.7 is success, not failure — Pre-mortem exercise: 'Imagine it's December 31 and we achieved 100% of every KR. What did we have to do differently?' (20 min) — Anti-OKR exercise: for each proposed KR, team must argue why it's too easy (15 min) — KR rewriting rounds (40 min) — Commitment and accountability structure (20 min) — Close and next steps (10 min) Example of a pre-mortem prompt: 'We shipped the AI product on time with 90% customer satisfaction. Walk me backwards — what did we do in Q1 that made that possible?' Write the full guide with facilitator script.

#### #0142 — OKR Annual Review and Reset — Few-Shot

You need to run the annual OKR review and set the following year's OKRs. This is a 3-hour leadership team session. Good annual review agendas have these characteristics: Example 1 (tech company, 80-person team): Spent 45 minutes doing a 'proud and sorry' exercise before touching any scores — what are we genuinely proud of this year, and what do we wish we'd done differently? This surfaces context before judgment. Example 2 (professional services firm): For each missed KR, asked 'Was this a goal-setting failure or an execution failure?' This distinction was transformational — many 'failed' KR's turned out to be poorly written goals, not poor execution. Example 3 (e-commerce startup): Started the year-reset not with OKRs but with 'What is the one thing that would make everything else easier or irrelevant?' This identified 2 transformational priorities that became the top Objectives. Now design the full 3-hour agenda for an annual OKR review and year-ahead goal-setting session for a 15-person leadership team at a \$60M ARR B2B company that is pivoting from land-and-expand to platform strategy.

#### #0143 — OKR Retrospective for Failed Quarter — Few-Shot

Write an OKR retrospective report for a quarter where the team scored an average 0.4 (significantly below the 0.7 target). The purpose of the retrospective is learning, not blame. Examples of insightful retrospective analysis: Example 1 — Attribution analysis: 'Of the 12 KR's that missed, 5 were due to external market conditions (demand shifted), 4 were due to resourcing gaps identified mid-quarter too late, and 3 were genuinely poor execution. Only the 3 should inform performance reviews.' Example 2 — Goal quality analysis: 'In retrospect, 6 of our 12 KR's were tasks masquerading as outcomes. 'Complete the integration with Salesforce' is a task. 'Enable 80% of customers to sync data in <5 clicks' is an outcome. We will retrain on KR writing before Q3 planning.' Example 3 — Dependency failure: 'KR4 (achieve 95% data accuracy) failed because it depended on a data infrastructure project that was de-prioritized in week 3. This dependency was never surfaced at the OKR planning stage. We will require all KR's to have dependencies explicitly documented at planning.' Now write the retrospective report for this specific situation: An engineering team set 4 Objectives with 3 KR's each (12 total). Average score: 0.42. The company launched a new enterprise customer that required 40% of the team's bandwidth for an unplanned 6 weeks.

#### #0144 — OKR vs KPI Clarity Session — Chain-of-Thought

Many leadership teams confuse OKRs with KPIs. Help me think through the difference clearly, step by step. Step 1: Define OKRs and KPIs in plain language. When would you use each? Step 2: Give an example of a business metric that works as a KPI but fails as an OKR KR. Explain why. Step 3: Give an example of an OKR KR that is not a useful ongoing KPI. Explain why. Step 4: Describe the relationship between the two systems — how should they co-exist in a company that uses both? Step 5: What does a well-governed OKR + KPI system look like in practice? Describe the meeting cadence, owners, and review processes. Work through each step before giving a summary recommendation.

#### #0145 — OKR Alignment Audit — Think Step by Step

My company has 200 OKRs across 20 teams. I believe we have an alignment problem: individual teams are pursuing their own objectives without connecting to company strategy. Walk me through an OKR alignment audit. Think step by step: 1. What does 'alignment' mean in the context of OKRs? Define it precisely. 2. What are the most common alignment failure modes you see in companies with 15+ teams? 3. How would you audit alignment? What would you look at first? 4. What does a misaligned OKR look like in practice? Give an example. 5. What is the fix — is it a goal-setting process change, a structural change, or a culture change? 6. What is the minimum viable alignment system for a 200-person company? Work through each before giving a redesign recommendation.

#### #0146 — Company OKR Town Hall Script — Role-Based

Act as an experienced CEO who has successfully run OKRs at 3 companies. I am a first-time CEO introducing OKRs to my 250-person company for the first time. We have never used OKRs before. The company has been managed by departmental goals and annual performance reviews. Write the town hall presentation script I should use to introduce OKRs. The presentation is 20 minutes plus Q&A.; Cover: — Why we're changing (without criticizing what we did before) — What OKRs are and aren't (common misconceptions to address proactively) — How OKRs connect to performance reviews (the answer: they don't directly) — What will happen in the next 30 days (the rollout plan) — Q&A.; give me the 8 most likely tough questions and how to answer them honestly Make the script feel human and specific — not like a corporate change management memo.

#### #0147 — OKR Champions Network Design — Role-Based

Act as an OKR transformation specialist who has rolled out OKRs at companies from 50 to 5,000 people. My company (800 employees, 12 departments) is 6 months into our OKR rollout and struggling. Adoption is patchy — 4 departments are using OKRs well, 8 are going through the motions. The CEO wants an OKR Champions Network to drive adoption. Design the network: 1. Who should be an OKR Champion (criteria, not job titles)? 2. What does a Champion do — specifically, not vaguely? 3. What training and enablement do Champions need? 4. How do Champions interface with the central OKR program team? 5. What incentives exist for Champions (given they're doing extra work)? 6. How do you know the network is working? What are the metrics? Be specific. I need to bring this proposal to the CEO next week.

#### #0148 — Weekly OKR Check-In Template

Design a 15-minute weekly OKR check-in template for a team of 8. Each person answers 3 questions: (1) confidence score (1-5) on their KR since last week, (2) one thing that moved the needle, (3) one blocker they need help removing. Include a facilitator note on how to keep the check-in from becoming a status meeting. Format as a reusable Slack post template.

#### #0149 — OKR Launch Email to All Staff

Write the all-company email launching the Q2 OKR cycle. The email should: explain what OKRs are for anyone new, share the 3 company-level Objectives for Q2 (use placeholders), explain the timeline for team OKR submissions, provide a link to the OKR template, and share where to ask questions. Max 300 words. Tone: energetic, clear, not corporate.

#### #0150 — Individual Contributor OKR Writing Guide

Write a 1-page guide for individual contributors (non-managers) on how to write personal OKRs that connect to their team's goals. Include: the difference between a project task and an OKR, how to write KR using the 'I will [verb] [measurable outcome] by [date]' format, 3 examples of before/after KR rewrites, and the top 5 mistakes to avoid. Max 400 words.

#### #0151 — CEO OKR Accountability Message

Write the CEO's quarterly message to all staff on OKR accountability. The quarter ended with the company at 0.65 average OKR score (below the 0.7 target). 2 Objectives were strong (0.8+). 1 Objective missed badly (0.4) due to a product launch delay. The CEO wants to be transparent, own the miss on the product objective, celebrate the wins, and set clear expectations for Q3. Max 250 words.

#### #0152 — OKR Planning Timeline and Milestones

Create a detailed OKR planning timeline for a company that runs quarterly OKRs. The timeline should run from T-21 days (3 weeks before quarter start) through T+5 days (first week of new quarter). For each milestone, note: the activity, who is responsible, the output, and how long it takes. Include the CEO review session, department submissions, cross-team alignment check, and final publish date.

### #0153 — OKR and Performance Review Firewall Policy

Write the company policy on the relationship between OKRs and performance reviews. The policy should clearly state: OKRs are not performance reviews; missing an OKR does not automatically mean underperformance; how OKR results are used as one input (not the only input) in annual reviews; what behaviors and OKR hygiene are evaluated; and how managers should discuss OKR results in 1:1s without turning them into performance conversations.

### #0154 — OKR Health Metrics Dashboard

Design a leadership team OKR health dashboard. Metrics to track: % of teams with OKRs published on time, average confidence score by team (weekly), % of KR updates in the past 7 days (staleness), distribution of scores (how many are stretch vs. comfortable), and number of KR updates at risk flagged before quarter end. Format as a table showing current vs. target for each metric.

### #0155 — Product Team OKR Template

Write a Q3 OKR template specifically designed for a B2B SaaS product team. Include: 3 suggested Objective categories (customer value, product quality, team delivery), 2-3 example KR per Objective category, guidance notes on how to adapt the examples to the team's actual priorities, and a 'not-a-KR' warning list (things that look like KR but aren't outcomes). The template should be a working document a team can use in a 90-minute planning session.

### #0156 — OKR Scoring Dispute Resolution Process

Write the process for resolving an OKR scoring dispute between a manager and direct report. The process should have 3 stages: (1) self-review with evidence, (2) manager-employee discussion guided by the KR definition, (3) escalation to HR/OKR program owner if unresolved. Include a dispute form template. Note: the purpose is calibration, not conflict. Tone: constructive and practical.

### #0157 — OKR Executive Sponsor Role Description

Write the role description for an OKR Executive Sponsor — the C-level leader responsible for a cross-functional OKR that spans multiple departments. Cover: what the sponsor is accountable for (not responsible for — they don't do the work), how they resolve cross-team blockers, when they escalate to CEO, how often they check in with the OKR owner, and what success looks like for a sponsor. This is for a company that is deploying its first company-wide AI initiative OKR.

### #0158 — OKR for Non-Profit Organisation

A non-profit organisation serving refugee communities wants to adopt OKRs. Their challenge: their outcomes are long-term (5+ years) and hard to measure in a quarter. Write 3 quarterly Objectives with 3 KR each that demonstrate how OKRs can work for a non-profit context. Show how to create meaningful short-term KR that are leading indicators of long-term impact. Include a note on how to adapt OKR cadence for a non-profit context.

### #0159 — Confidence Score Calibration Guide

Write a guide on using confidence scores (1-5 or 1-10) in weekly OKR check-ins. Cover: what a confidence score means (probability of hitting the KR by quarter end), how to calibrate what a 5/10 means in practice, the most useful signal in the score trend (not the score itself — the direction over 3 weeks), what a sudden drop in confidence should trigger (a conversation, not an alarm), and how managers should respond to low confidence scores without micromanaging.

### #0160 — OKR Refresh for Stale Objectives

3 months into the year, the company has pivoted its strategy. 8 of the 12 company OKRs are now irrelevant. Write the protocol for an in-year OKR refresh: how to officially retire OKRs without punishing teams for the miss, how to write replacement OKRs mid-cycle, how to communicate the change to the whole company in a way that preserves credibility, and how to prevent OKR refresh from becoming a mechanism to lower ambitions.

### #0161 — Manager's Guide to OKR 1:1s

Write a manager's guide to incorporating OKR discussion into weekly 1:1s. The guide should cover: how long to spend on OKRs in a 30-minute 1:1 (hint: 10 minutes max), the 3 questions that generate useful OKR conversation, how to coach a direct report who is stuck without doing the work for them, when to escalate a KR issue vs. letting the individual own the fix, and how to keep OKR check-ins from becoming purely status reporting.

### #0162 — OKR for a Customer Success Team

Write Q2 OKRs for a 15-person Customer Success team at a \$50M ARR SaaS company. The team's priorities: reduce churn, increase NRR, and improve the onboarding experience. Write 2 Objectives with 3 KR each. For each KR, include: the baseline metric, the target, the owner within the CS team, and the data source for measurement. Make the KR specific enough that there is no ambiguity about whether they were hit.

### #0163 — OKR Documentation Best Practices

Write the OKR documentation standards for a company using Notion to track OKRs. For each OKR entry, specify the required fields: Objective statement, why it matters (2 sentences), KR text, baseline, target, data source, owner, current score, last updated date, confidence score, blockers log, and notes. Include examples of entries that meet the standard and 3 examples of poorly documented OKRs with annotations explaining what is wrong.

### #0164 — OKR Communication Cascade Template

Write the communication cascade for company OKRs. For each level — all-company, department, team, individual — specify: who communicates, what is communicated, the format (town hall / all-hands / team meeting / 1:1), what questions to address at each level, and how the cascade timeline works (company OKRs published T-14 days before departments, etc.). Format as a structured guide a new OKR program manager could follow.

### #0165 — Founder OKR Letter to Company

A founder is writing the annual letter to all staff to launch the year's OKRs. The company had a hard year — missed revenue, lost a key customer, and had one leadership departure. But the AI product is finally working, and there are 2 strong new enterprise customers. The founder wants to be honest about the year, show genuine optimism about what is ahead, and build commitment to the new Objectives. Write the letter. Max 400 words. First-person voice, no corporate language.

### #0166 — OKR Grading Ceremony Script

Write the script for an all-hands OKR grading ceremony at end of quarter. The format: 30-minute session, each team lead reports their OKR scores in 2 minutes, followed by a 10-minute CEO summary. The tone should make celebrating 0.7 (stretch hit) feel like a win, and make honest assessment of misses feel safe and productive — not punitive. Include the CEO's opening frame and closing remarks.

### #0167 — Badly Written OKR Fix Workshop

Design a 60-minute workshop for a 10-person leadership team to audit and improve their current OKRs. The workshop uses a 'bad OKR / fixed OKR' exercise. For the workshop, write: (1) 10 example badly-written KR for the team to fix (covering the most common errors: tasks instead of outcomes, unmeasurable, too vague, too easy), (2) the correct versions of each, (3) the facilitation guide for the session including how to give feedback without being critical of individuals.

### #0168 — OKR Alignment Map Visual Template

Describe how to create an OKR alignment map — a visual document that shows how team OKRs connect to company OKRs. The map should show: company-level Objectives at the top, arrows showing which department OKRs contribute to each company Objective, any team OKRs that do NOT connect to a company Objective (surfacing misalignment), and cross-team dependencies. Write the instructions for building this in a 2-hour leadership team workshop.

### #0169 — OKR Champions Certification Program

Design a 4-module OKR Champions certification program for internal coaches. Module 1: OKR fundamentals and common failures (3 hours). Module 2: Facilitation skills for OKR planning sessions (3 hours). Module 3: Coaching managers and teams through OKR challenges (3 hours). Module 4: OKR program health metrics and continuous improvement (2 hours). For each module, list: learning objectives, content outline, exercises, and assessment criteria.

### #0170 — International OKR Rollout Guide

A company is rolling out OKRs to 5 international offices for the first time (US HQ, UK, Germany, Singapore, Brazil). Write the rollout guide addressing: how to adapt OKR cadence to different time zones and regional holidays, how to ensure local OKRs connect to global OKRs without micro-managing regional teams, how to handle language and translation for KR metrics, and what cultural adaptation is needed for regions where direct performance accountability language feels uncomfortable. Practical and specific.

### #0171 — OKR Platform Selection Guide

Write a 15-criteria evaluation guide for selecting an OKR software platform. For each criterion, describe what to look for and what questions to ask vendors. Criteria include: ease of OKR entry and editing, check-in workflow and reminders, alignment visualization (org chart view), integrations with existing HR and project management tools, mobile app quality, reporting for leadership, admin controls, pricing model, and customer support quality. Include a scoring matrix.

### #0172 — Annual OKR Retrospective Survey

Design a 20-question annual survey to evaluate the effectiveness of the company's OKR program. Questions should cover: how well employees understand OKRs (knowledge), whether OKRs feel connected to company strategy (alignment), whether OKR planning feels like real strategic work vs. a compliance exercise, whether OKR check-ins are valuable, and whether OKRs have changed how people make decisions. Include both rating scale and open-ended questions. Use this to identify the top improvement priorities for next year.

### #0173 — OKRs for Remote-First Company

Write a guide on adapting OKR practices for a fully remote company with employees in 12 countries. Cover: how to run effective virtual OKR planning sessions (tools, facilitation approach, time zone management), how to maintain OKR visibility and accountability without in-person touchpoints, how to run virtual OKR grading ceremonies, and what async OKR check-in tools work best. Include a specific remote OKR meeting template.

### #0174 — Engineering Team OKR Anti-Patterns

Write a detailed guide on the 8 most common OKR anti-patterns specific to engineering teams: (1) shipping features as KRs instead of customer outcomes, (2) measuring velocity instead of quality, (3) setting technical debt reduction as a KR without a baseline, (4) making reliability KRs with no baseline SLA, (5) tying OKRs to roadmap completion rather than impact, (6) creating OKRs that duplicate sprint goals, (7) setting individual KRs that require cross-team dependencies without ownership, (8) making security and compliance 'stretch' goals. For each, write the anti-pattern example and the improved version.

### #0175 — OKR Kickoff Season Planning Calendar

Create the complete OKR kickoff season planning calendar for a 500-person company. The planning season runs from Week 1 (6 weeks before new quarter) through Week 6 (1 week into new quarter). For each week, list: the key activities, who is involved, what decisions need to be made, and what is output by end of that week. Include the specific meeting types (strategy review, CEO review, all-hands launch) with agenda summaries.

### #0176 — OKR for Customer Support Team

Write OKRs for a 25-person customer support team at a SaaS company whose support volume has grown 40% while headcount stayed flat. Key tensions: leadership wants to automate more tickets with AI, but the team is worried about quality and burnout. Write 2 Objectives and 3 KR each that balance efficiency and quality, protect the team from burning out, and create a pathway to AI-assisted support that the team can own rather than resist.

### #0177 — OKR and Budget Alignment

Write a framework for aligning the annual budgeting process with OKR planning. The core problem: budgets are typically set top-down 4 months before the year starts, but OKRs are set quarterly. This creates situations where teams have OKRs but no budget to execute them. The framework should define: the sequencing of strategy → OKRs → budget, how to create OKR-tagged budget lines, how to handle in-year OKR changes that require budget reallocation, and the governance process for approving OKR-driven mid-year budget requests.

### #0178 — Sales Team OKR Cadence Design

The sales team is resistant to OKRs because they already have clear revenue quotas and pipeline targets. Write a framework for integrating OKRs with sales quota management in a way that adds value rather than duplicating effort. Include: how OKRs capture the strategic initiatives that lead to quota achievement (not just the quota itself), the recommended cadence (monthly vs. quarterly for sales), how OKR scores interact with quota attainment in performance reviews, and sample OKRs for a VP of Sales that go beyond revenue targets.

### #0179 — OKR Impact Measurement Guide

Write a guide for measuring whether a company's OKR program is actually improving business performance. The guide should define: the baseline metrics to track before OKR implementation (strategy alignment score, employee clarity on priorities, decision-making speed), the 6-month post-implementation metrics, the 12-month test of whether OKRs have changed business outcomes (not just OKR adoption rates), and a methodology for attributing business outcomes to OKR quality improvements vs. other factors.

### #0180 — New Manager OKR Writing Workshop

Design a 2-hour workshop for first-time managers learning to write OKRs for their teams. Include: a 20-minute conceptual frame on OKRs (what they are, what they aren't), a 30-minute exercise where each manager drafts 1 Objective and 2 KR and shares for peer feedback, a 30-minute 'bad KR hospital' exercise where they fix 10 broken KR, a 20-minute segment on how to run OKR planning sessions with their teams, and 20 minutes on common OKR pitfalls and how to avoid them.

### #0181 — OKR for Finance Team

Write Q3 OKRs for a 12-person finance team at a \$100M ARR company. The team's priorities are: close the books faster (currently Day 12, target Day 8), improve financial forecast accuracy (currently 85% at quarter start, target 92%), and automate 3 manual reporting processes. Write 2 Objectives with 3 KR each. Each KR must have a baseline, target, data source, and owner.

### #0182 — OKR Review Meeting Template

Write a 45-minute OKR review meeting template for a 10-person product team. The meeting reviews progress at the midpoint of the quarter. Structure: check-in confidence scores (10 min), deep dive on KR at risk (15 min), resource request or blocker removal (10 min), commitment to second-half actions (10 min). Include facilitation notes for each section and a post-meeting summary template.

### #0183 — OKR Failure Accountability Framework

Write the accountability framework for when OKRs are missed. The framework should distinguish between: missed OKRs due to poor execution (accountability appropriate), missed OKRs due to wrong goal-setting (accountability for the process, not the miss), and missed OKRs due to external forces (no accountability — learn from them). Define what the conversation looks like for each scenario and how the manager should approach it.

### #0184 — Personal OKR Template for Executive

Write a personal OKR template for a C-suite executive to use for their own development alongside their business OKRs. The template should have 2 categories: Leadership Impact (how you show up as a leader) and Capability Growth (skills you are building). For each category, one Objective with 2 KR. Include examples: Leadership Impact KR: 'Receive 360 feedback score of 4.2/5 on 'creates psychological safety' metric by Q4' and Capability Growth KR: 'Complete MIT AI Strategy executive program and apply 1 framework to a real business decision per month.'

### #0185 — OKR Integration with Project Management

Write the integration guide for connecting OKRs to the team's project management system (Jira or Asana). The guide should explain: how an OKR KR relates to a sprint goal (they are not the same — KR is an outcome, sprint goal is a deliverable), how to tag projects and tasks to their parent KR, how to use project completion data to auto-update KR progress, and how to handle the conflict when a project is on track but the KR is not (often because the project is the wrong project for the KR).

### #0186 — OKR Grading Rubric for Customer Metrics

Create the OKR grading rubric for customer-facing KR specifically. Customer metrics (NPS, churn, CSAT) are often outside the team's full control. The rubric should: distinguish between metrics the team can influence directly vs. indirectly, define how external events (product bugs, market downturns) affect grading, and set a principle: grade on whether the team did everything in their power to achieve the KR, not only on whether the number moved.

### #0187 — Annual OKR Report to Board

Write the annual OKR report for the board — a 3-page document showing what the company committed to for the year, what it achieved, and what it learned. Structure: year-in-review summary (overall OKR score, key wins, key misses), deep dive on the most important OKR (what was learned), what changes are being made to the OKR process for next year, and the company Objectives for the coming year. Tone: honest about misses without being punitive, proud of wins without being boastful.

### #0188 — OKR Documentation for Remote Teams

Write the OKR documentation standards for a fully remote team of 25 across 8 time zones. The standard should cover: which fields are required in the async OKR tracking system, the async check-in process (written weekly update instead of synchronous meeting), the format for raising blockers asynchronously, the response SLA from managers on blockers (24 hours), and how the team's OKRs are visible to the whole company without overwhelming anyone with information.

### #0189 — OKR for Legal Team

Write Q2 OKRs for a 6-person legal team at a high-growth SaaS company. Common legal team OKR failure: 'Review all contracts' is not an OKR — it is a job description. Good legal OKRs focus on outcomes: reducing contract cycle time, reducing legal risk exposure, improving the legal team's responsiveness as perceived by internal clients. Write 2 Objectives with 3 meaningful KR each.

### #0190 — OKR Incentive Design

Write the framework for connecting OKR achievement to company-wide bonus pools. The framework must: avoid the 'sandbagging' problem (if bonuses are tied directly to OKR scores, people set easy OKRs), distinguish between OKR achievement and individual performance (a team member who performed excellently on a missed OKR should still be recognized), and define the right weighting of company OKR achievement vs. team OKR achievement vs. individual performance in the bonus formula.

### #0191 — OKR Pilot Program Design

Write the design for a 6-month OKR pilot program for a company that has never used OKRs before. The pilot should: involve 3 teams (one from product, one from sales, one from operations), have a light governance structure (monthly check-in, no complex tooling in phase 1), produce a clear evaluation criteria (did the 3 pilot teams find OKRs valuable?), and result in a go/no-go recommendation for company-wide rollout. Include the pilot selection criteria, the evaluation framework, and the rollout plan if the pilot succeeds.

### #0192 — Aspirational vs. Committed OKRs

Write the guide for using both aspirational (stretch) and committed OKRs in the same cycle. Aspirational OKRs should have a 60-70% chance of full achievement and are graded differently (0.7 is success). Committed OKRs are things the team must deliver (1.0 expected). Write the guidance on: what should be aspirational vs. committed, how to communicate the difference to the team, how to avoid the trap where teams make everything 'aspirational' to protect themselves, and how to handle the situation where a committed OKR is going to be missed.

### #0193 — OKR Kick-off Presentation

Write the 20-minute company OKR kick-off presentation for the start of the quarter. Slides needed: why OKRs (the problem we're solving), how OKRs work (3 slides: objectives are aspirational, KRs are measurable, the weekly check-in process), this quarter's company OKRs (displayed simply), what happens next (team OKR setting, due date), and Q&A.; Tone: energetic and practical, not academic. Employees should leave knowing exactly what they need to do in the next two weeks.

### #0194 — OKR Health Check Framework

Write the OKR health check framework for the mid-quarter review. The review should assess each KR on 4 dimensions: Progress (on track?), Confidence (will we hit this by end of quarter?), Relevance (is this still the right KR given what's changed?), and Resourcing (does this KR have the people and budget it needs?). Write the 4 assessment questions for each dimension and the scoring rubric (Green/Amber/Red for each).

### #0195 — OKR Retrospective Template

Write the end-of-quarter OKR retrospective template. Structure: Score each KR (0.0–1.0), Reflect on what drove the score (celebrating wins, understanding misses), Extract learnings for next quarter (what do we do differently?), and Celebrate the team. The retrospective should take 60 minutes maximum. Include the facilitation guide, the scoring tool, and the format for capturing learnings for next quarter's planning.

### #0196 — Team OKR Setting Workshop

Design the 2-hour team OKR setting workshop. Pre-work: team reviews company OKRs and identifies how their work connects. Workshop: brainstorm objectives (15 min), narrow to 3 (20 min), define KRs for each objective (40 min), pressure-test KRs (are they really measurable? are they outcomes?) (20 min), assign owners and commit (15 min). Post-work: team lead submits OKRs for review by OKR champion. Include the workshop materials and the OKR submission template.

### #0197 — OKR Integration with Hiring

Write the guide for integrating OKRs with hiring decisions. If a KR is at risk because of a skill gap (not a process problem), hiring may be the answer. The guide should help managers distinguish: KRs that are failing because of a skill gap (case for hiring), KRs that are failing because of a process problem (case for process improvement), and KRs that are failing because the goal was wrong (case for revising the KR). Include how to write a job description that maps to a specific KR gap.

### #0198 — OKR vs. Job Description

Write the explainer on the difference between OKRs and job descriptions. This is the most common OKR mistake: writing OKRs that describe job responsibilities ('support customers,' 'ship features') rather than outcomes ('improve NPS from 32 to 45,' 'launch 3 features that increase retention by 10%'). Include 5 before/after examples for different functions and the principle: 'If you would be doing this even if there was no OKR, it's not an OKR — it's your job.'

### #0199 — Cross-Functional OKR Dependencies

Write the protocol for managing cross-functional OKR dependencies. Example: the product team's KR (ship AI feature by October 1) depends on the data team (prepare the training dataset by August 15) and the security team (approve the model's data handling by September 1). The protocol should: identify dependencies at the OKR setting stage, document them in the OKR system, create accountability for the dependency owners, and define the escalation process if a dependency falls behind.

### #0200 — OKR for Customer Success Team

Write the Q4 OKRs for a 20-person customer success team. The team's priorities: reduce churn below 5% annual, grow NRR to 115%, and improve team capacity (reduce admin work by 20% to free time for strategic customer engagement). Write 3 Objectives with 3 KRs each. Each KR must be achievable by the CS team alone — do not write KRs that require product team changes.

### #0201 — OKR Communication Cascade

Write the OKR communication cascade plan for a company that has set company-level OKRs and needs departments to create their own aligned OKRs within 2 weeks. The cascade plan should: communicate company OKRs clearly to all managers (not just a Google Sheets link), explain how team OKRs should align to company OKRs (connection vs. copy), set the deadline and review process, provide support resources (OKR coach available for office hours), and define the approval process for team OKRs before they are finalized.

### #0202 — OKR Tool Selection Guide

Write the OKR tool selection guide for a 200-person company currently tracking OKRs in spreadsheets. Evaluate 4 options: continue with spreadsheets (cost: \$0, pain: high), build a simple internal tracker (cost: \$20K one-time, control: high), use an OKR tool like Lattice or Betterworks (cost: \$15K/year, feature-rich), or use a project management tool with OKR plugin like Asana (cost: \$25K/year, integrates with existing workflow). Write the evaluation criteria and recommendation.

### #0203 — OKR for Nonprofit Organizations

Write the guide for adapting OKRs to a nonprofit context. In nonprofits, 'success' is harder to define because revenue is not the primary goal. The guide should: define what 'objectives' mean in mission-driven work (impact objectives, not revenue objectives), how to write KRs when the causal chain from activity to impact is long and uncertain, the special challenge of grant-funded work (grant deliverables are not the same as OKRs), and how to use OKRs to align volunteer and staff effort. Include 3 example nonprofit OKRs.

### #0204 — OKR Quarterly Planning Cadence

Write the quarterly OKR planning cadence for a 100-person company. Week -4 before quarter: CEO sets top 3 company priorities for the coming quarter. Week -3: department heads draft team OKRs. Week -2: cross-functional OKR review (identify dependencies and conflicts). Week -1: OKRs finalized and published to whole company. Week 1: OKR kick-off (all-hands presentation). Include the roles, responsibilities, and decision rights at each stage.

### #0205 — OKR Misuse Patterns

Write the guide to the 7 most common OKR misuse patterns. Include: (1) OKRs as task lists, (2) OKRs as performance reviews disguised as goal-setting, (3) too many OKRs (more than 3 objectives per team is a sign of poor prioritization), (4) KR that measure outputs not outcomes, (5) KR with no baseline (you cannot know if you've improved without a starting point), (6) OKRs that are never reviewed (set-and-forget), and (7) sandbagging (setting easy OKRs to guarantee green scores). For each pattern, write the fix.

### #0206 — Executive OKR Accountability Review

Write the executive OKR accountability review format for the CEO's monthly 1:1 with each C-suite member. The review should: check OKR progress honestly (not just green-washed status reports), identify the executive's top 3 actions for the coming month to improve OKR trajectory, surface the 1 thing the CEO can do to unblock this executive's OKRs, and record the conversation in a lightweight memo. Duration: 30 minutes maximum. The tone should be developmental and honest, not punitive.

### #0207 — OKR Company All-Hands Review

Write the end-of-quarter company all-hands OKR review format. This is a 45-minute all-hands meeting. Structure: company OKR scorecard (10 min — honest about hits and misses), deep dive on the 1 most important miss (10 min — what happened, what we learned), celebration of the top win (5 min), preview of next quarter's priorities (10 min), Q&A; (10 min). The CEO should present personally. Include guidance on how to present a miss without damaging team morale.

### #0208 — OKR for Engineering Team

Write the Q2 OKRs for a 30-person engineering team. The team's priorities: improve system reliability (currently 99.5%, target 99.9%), reduce deploy cycle time (currently 3 weeks, target 1 week), and complete the AI infrastructure buildout (must complete by June 30 for product launch). Write 3 Objectives with 3 KR each. Engineering OKRs are especially prone to the 'output vs. outcome' mistake — each KR here must be an outcome.

### #0209 — OKR Weighting and Prioritization

Write the guide for when a team has more potential OKRs than they can execute. The prioritization guide should: define the impact-effort matrix for ranking potential KR, explain how to use company OKRs to filter (the KR that most directly support company OKRs get priority), address the trade-off between quick wins (good for morale) and long-term bets (more strategically important), and recommend a maximum of 10 KR per team per quarter. Include the facilitation exercise for narrowing to the final set.

### #0210 — OKR Rollup Reporting

Write the OKR rollup reporting format for a 5-level organization (company → business unit → department → team → individual). At each level, the OKR summary should: show the level's OKRs and current progress, show how they roll up to the level above, and flag cross-level dependencies. The challenge: different levels use different language and metrics. Write the rollup format that maintains clarity at each level without requiring every executive to read every team's OKRs.

### #0211 — OKR Change Management

Write the change management plan for introducing OKRs in an organization that currently uses MBO (Management by Objectives) and is skeptical of the change. The key resistance: managers who believe OKRs are just MBO with new branding, and employees who fear that OKRs will be used for performance reviews. Address both concerns directly. The plan should include: executive sponsor (CEO must model OKR behavior), manager training, a FAQ document, and a 6-month adoption timeline with success milestones.

### #0212 — OKR for Data and Analytics Team

Write the annual OKRs for a 10-person data and analytics team. The team's purpose is to help the business make better decisions faster. Good OKRs for a data team focus on outcomes (decisions improved) not outputs (reports generated). Write 3 Objectives: (1) improve data quality so business teams trust the data (KRs: % of reports without data quality escalations), (2) democratize self-service analytics (KRs: % of managers running their own reports), (3) deliver the AI-ready data platform (KRs: specific data product launched by date).

### #0213 — OKR Communication to Individual Contributors

Write the communication to individual contributors explaining what OKRs mean for them personally. Many IC-level employees feel alienated by OKR processes that seem designed for managers. The communication should: explain the purpose (align effort, not surveil employees), make clear that OKRs are not the same as performance reviews, show how their daily work connects to company outcomes, explain what they are asked to do (contribute to team OKRs, not necessarily write individual OKRs), and answer the top 5 questions ICs have about OKRs.

### #0214 — OKR Risk Register

Write the OKR risk register — a pre-mortem exercise done at the start of the quarter. The team identifies the top 5 risks that could prevent each KR from being achieved, rates each risk by likelihood and impact, and assigns a mitigation action. This is done in a 30-minute workshop at the start of the quarter. The goal: identify risks early so the team can take action before they materialize, rather than explaining them in the end-of-quarter retrospective.

### #0215 — OKR for Marketing Team

Write the Q3 OKRs for a 15-person marketing team. The team's priorities: improve brand awareness in the enterprise segment, generate pipeline for the sales team, and launch the new AI product line's GTM campaign. Write 3 Objectives with 3 KRs each. Marketing OKR common pitfalls: using vanity metrics (impressions, website visits) as KRs rather than business-impact metrics (qualified pipeline generated, influenced ARR).

### #0216 — OKR System ROI Calculation

Write the methodology for calculating the ROI of the OKR system. Inputs: time invested (hours per employee per quarter setting, reviewing, and tracking OKRs) multiplied by average hourly cost, plus OKR software cost. Benefits: improvement in goal alignment (measured by pre/post survey), improvement in key metrics directly attributable to OKR focus, reduction in time wasted on misaligned work. Write the ROI model and the benchmark: 'a well-implemented OKR system typically delivers 10–20% improvement in strategic goal achievement.'

### #0217 — OKR Abandonment Risk

Write the guide for preventing OKR abandonment — when teams set OKRs enthusiastically but stop checking in after week 3. Root causes: OKRs feel bureaucratic, check-ins are not useful, managers don't model OKR behavior, OKR tools are hard to use, no consequence for non-engagement. For each root cause, write the specific intervention. Include the early warning signals of OKR abandonment (check-in rate below 60%, manager not asking about OKRs in 1:1s) and the recovery process.

### #0218 — OKR for Operations Team

Write the Q1 OKRs for an operations team at a 500-person company. Operations' job is to make the company run more efficiently and reliably. Good operations OKRs: reduce process cycle times, improve reliability of critical processes, reduce cost per unit of output, and improve internal customer satisfaction. Write 3 Objectives with 3 KR each. One objective must be about operational reliability, one about efficiency, and one about the team's own capability development.

### #0219 — OKR Confidence Score System

Write the OKR confidence score system. Each KR is rated weekly on a 1–10 confidence scale: 1–3 means very unlikely to hit target, 4–6 means uncertain, 7–9 means on track, 10 means target will be exceeded. The confidence score captures the team's honest forecast, not their hope. Explain: how confidence scores differ from progress scores, how managers should respond to low confidence scores (not with pressure, but with curiosity — 'what's in the way?'), and how to avoid the inflation of confidence scores over time.

### #0220 — OKR Board Presentation

Write the board presentation for the company's annual OKR performance. The presentation should: show the company's 4-quarter OKR history (trends, not just current quarter), explain the methodology (why certain OKRs were scored the way they were), highlight the strategic insight from the year's OKR data (what did we learn about our business?), and connect OKR achievement to financial performance. This is a governance presentation — the board wants to understand if the OKR system is helping the company execute on strategy.

### #0221 — OKR for New Manager

Write the guide for a new manager setting OKRs for the first time. The guide should: explain the mindset shift from individual contributor (my work) to manager (my team's outcomes), help the manager identify the 3–5 outcomes their team most needs to deliver this quarter, walk through the KR quality checklist (measurable? outcome not output? baseline exists?), address the confidence calibration challenge (new managers tend to be overconfident about what their team can achieve), and set expectations for their first OKR review conversation.

### #0222 — OKR Success Story Template

Write the OKR success story template for sharing wins across the company. A success story should capture: which KR was achieved, what the team did (not a list of tasks, but the strategic bet they made), what they learned along the way, the business impact of achieving this KR, and a quote from a team member. The success story is published in the company intranet after each quarter. Length: 300 words. Purpose: make OKRs feel meaningful, not bureaucratic.

### #0223 — OKR for Sales Team

Write the Q4 OKRs for a 30-person sales team. Priorities: close the gap to annual quota (\$80M target, \$58M closed by Q4 start — need \$22M in Q4), improve win rate from 22% to 28% (focus on competitive deals), and reduce average sales cycle from 90 to 75 days (focus on enterprise deals stuck at legal). Write 3 Objectives with 3 KR each. Note: quota itself is not an OKR — write the underlying improvement drivers that will help the team close more.

### #0224 — OKR Sponsorship Requirements

Write the sponsorship requirements for the CEO and C-suite to make the OKR system work. OKRs fail when executives treat them as a management tool they delegate to HR rather than a strategy execution tool they own. The requirements: CEO must present company OKRs personally at the all-hands (not delegate to Chief of Staff), each C-suite member must publicly share their team's OKR progress at the monthly leadership meeting, and CEO must mention OKR progress in 30% of company communications. Include how to hold executives accountable for sponsorship.

### #0225 — OKR for Hardware and R&D; Teams

Write the guide for using OKRs in hardware and R&D; contexts where outcomes are inherently uncertain and development cycles span multiple quarters. Standard OKR advice (quarterly outcomes) often breaks down in R&D.; The guide should: explain how to write OKRs for multi-year R&D; programs (milestone-based KR rather than outcome KR), how to handle R&D; failures without penalizing the team (fail fast is a feature, not a bug), and how to distinguish between 'we set the wrong goal' (acceptable) and 'we didn't try hard enough' (not acceptable). Include 3 R&D; OKR examples.

### #0226 — OKR Process Documentation

Write the company's OKR process documentation — the single source of truth for how OKRs work here. The document should cover: the philosophy (why we use OKRs), the annual cycle (when company OKRs are set, when team OKRs are set), the structure (max 3 objectives per team, 3 KR per objective), the check-in cadence (weekly confidence scores, monthly review, end-of-quarter retrospective), the scoring methodology (0.0–1.0 scale, what each level means), the tools used (which system, how to access it), and the roles (OKR champion, managers, ICs). Write this as a 2-page internal wiki page.

### #0227 — OKR Software Comparison

Compare 4 OKR software tools for a 200-person company: Lattice, Betterworks, Workboard, and Ally.io. Evaluation criteria: ease of use (for both managers and ICs), integration with Slack and Salesforce, mobile app quality, reporting and analytics depth, pricing at our scale, customer support quality, and onboarding support. Write the evaluation rubric, score each tool, and give a recommendation with the rationale.

### #0228 — OKR Rollout Communication

Write the all-company communication announcing the OKR system launch. The message goes from the CEO and should: explain why the company is adopting OKRs (what problem are we solving?), describe what will change for employees (the quarterly rhythm, the check-in process), address the most common fear (this is not a performance review), set the timeline (OKRs will be set in the first 2 weeks of each quarter), and express personal commitment from the CEO. Maximum 400 words.

### #0229 — OKR for Creative and Design Teams

Write the guide for setting meaningful OKRs in creative and design roles. Creativity resists easy measurement, but that does not mean design teams should be exempt from outcome accountability. The guide should: distinguish between creative process metrics (number of designs shipped — output) and creative impact metrics (designs that increase conversion, usability scores — outcome), provide 5 example design team OKRs that are genuinely outcome-focused, and address the quality question (design quality is real but hard to quantify — how do you incorporate quality assessments into KR?).

### #0230 — OKR Alignment Session

Write the cross-functional OKR alignment session design. At the start of each quarter, team OKRs are reviewed in a 90-minute cross-functional session to identify conflicts and dependencies before OKRs are finalized. Session structure: each team presents their OKRs in 3 minutes, other teams flag dependencies and conflicts, the group resolves conflicts (not just notes them), and each team commits to supporting each other's OKRs where there is a dependency. Write the facilitation guide and the conflict resolution protocol.

### #0231 — Cascading OKRs in Large Organizations

Write the guide for cascading OKRs across 5+ levels of a large organization without creating bureaucratic overhead. The risk in large organizations: each level creates their own OKRs, which are then cascaded to the next level, creating 5 sets of misaligned OKRs by the time they reach ICs. The principle: OKRs should be horizontally aligned (teams commit to the same company goals), not vertically cascaded (a manager's KR becomes a team member's objective). Include 3 examples of horizontal alignment done right.

### #0232 — OKR and Budget Integration

Write the guide for integrating OKR planning with budget planning. The failure mode: OKRs are set in January, budget is set in November for the prior year, and the two processes are completely disconnected — so the OKRs have no money to fund them. The integrated approach: the October budget planning includes OKR-aligned investment decisions, so when OKRs are set in January they have funding committed. Write the integration points, the timeline, and the conversation the CFO and OKR lead need to have.

### #0233 — OKR Auditing for Quality

Write the OKR quality audit process. Many companies set OKRs that are technically compliant (they look like OKRs) but are actually low-quality (they are not ambitious enough, they measure the wrong things, or they are not really connected to company strategy). The audit should: score each team's OKRs on 5 quality dimensions (Strategic alignment, Ambition level, Measurability, Outcome focus, and Feasibility given resources), identify the bottom quartile teams that need OKR coaching, and track OKR quality score over time to measure the maturity of the OKR practice.

### #0234 — Hybrid OKR-KPI Framework

Write the hybrid OKR-KPI framework. Some organizations struggle with OKRs because they have business-as-usual metrics (KPIs) that must be maintained alongside ambitious OKRs. The hybrid framework should: distinguish between 'health metrics' (KPIs that must stay above a threshold — like uptime or employee safety — these are not OKRs because they are not aspirational, they are requirements) and 'improvement objectives' (where the team is trying to improve — these are OKRs). Write the framework for deciding which metrics are health metrics and which are OKR candidates.

### #0235 — OKR for Startup (Pre-Product/Market Fit)

Write the guide for using OKRs in a pre-product/market fit startup. Standard OKR advice does not work for early-stage companies because: the business model is still being discovered, metrics change monthly, and quarterly planning cycles feel too slow. The guide should: adapt the OKR format for monthly cycles in the earliest stage, focus OKRs on learning (what do we need to learn about our customers?) rather than scaling, and define the moment when the company has enough stability to use quarterly OKRs.

### #0236 — OKR Feedback Culture

Write the guide for building a feedback culture that supports OKRs. OKRs fail without psychological safety — if employees fear being penalized for honest reporting, they will game the scores. The guide should: define psychological safety in the context of OKRs (a culture where reporting a 0.3 score is treated as information, not failure), the CEO's role in modeling honesty (the CEO must be the first to report an honest miss), the manager's role in creating safety for their team, and the language norms that signal psychological safety ('that's good data' not 'why didn't you hit the target?').

### #0237 — OKR for Professional Services Teams

Write the OKR framework for professional services and consulting teams. Professional services teams are unusual: their 'product' is their time and expertise, and their output is delivered in project-based engagements. Standard OKR metrics (revenue, pipeline) apply, but professional services also needs outcome metrics for: utilization (billable hours vs. available hours), project delivery quality (client satisfaction, milestone achievement), talent development (junior staff growing to senior), and intellectual property creation (reusable methodologies, templates). Write 3 professional services Objectives with 3 KR's each.

### #0238 — OKR Vocabulary Guide

Write the OKR vocabulary guide for employees who are encountering OKR terminology for the first time. Define: Objective (aspirational goal), Key Result (measurable evidence of achievement), Initiative (the work you do to achieve a KR), Scoring (0.0–1.0 confidence scale), Committed KR (must deliver 1.0), Aspirational KR (0.7 is success), Check-in (weekly confidence update), Retrospective (end-of-quarter reflection), Cascade (how company OKRs connect to team OKRs), and North Star Metric (the one metric that matters most for the company's success). Write each definition in plain language with one example.

### #0239 — OKR for Acquisitions and M&A; Teams

Write the OKR framework for integration teams following an acquisition. The M&A; integration team has time-bound, milestone-driven work — it is not a steady-state team running quarterly goals. The OKR framework should: use project milestone KRs (which are appropriate for integration work), define the integration Objectives at 3 levels (Day 1: operational continuity, Day 90: first integration wins, Day 180: synergy realization), and address the tension between moving fast and maintaining morale of the acquired team. Write the integration OKR template.

### #0240 — OKR for Security and Compliance Teams

Write the OKR framework for security and compliance teams. Security and compliance are unusual because the most important outcome is the absence of negative events (no breaches, no compliance failures). OKRs that celebrate 'no incidents' are not OKRs — they are the floor. Security OKRs should focus on: capability building (improving detection time, reducing patch latency, increasing phishing resistance), compliance maturity (obtaining SOC 2 Type II, completing GDPR gap assessment), and proactive risk reduction (reducing attack surface, eliminating critical vulnerabilities). Write 3 security team Objectives with 3 KRs each.

### #0241 — OKR and Recognition Integration

Write the guide for integrating OKR achievement with recognition programs. Recognition should celebrate the right things: not just the teams that hit 1.0 (easily done by sandbagging), but the teams that showed the most growth, demonstrated the best OKR practices, or achieved a remarkable outcome against a genuinely difficult goal. The recognition program should: award for most improved OKR quality, best cross-functional OKR collaboration (a team that helped another team achieve their KR), and most honest OKR reporting. Write the recognition criteria and the 2-minute all-hands presentation format.

### #0242 — OKR Connection to Mission

Write the guide for connecting OKRs to the company's mission. This is the highest-level alignment question: why do our OKRs matter? The guide should: define the connection chain (mission → multi-year vision → annual company OKRs → quarterly team OKRs → individual contribution), help the CEO communicate the connection to employees, and build the OKR kick-off narrative that answers the question 'why does hitting this KR matter for what we are trying to do in the world?'

### #0243 — OKR Governance for Distributed Teams

Write the OKR governance model for a company with 5 autonomous business units operating in different markets. Each business unit has its own OKRs, but there are also company-level OKRs that all units contribute to. The governance model should: define which OKRs are set centrally (company-level), which are set independently by each business unit, how company-level OKRs are translated to business unit commitments (not identical cascades — each business unit contributes differently based on its market), the reporting cadence (business units report to CEO monthly), and the cross-business-unit OKR review (quarterly, to share learnings and best practices).

#### #0244 — OKR and Performance Management Integration

Write the guide for the relationship between OKRs and performance management. The most common OKR failure is when employees believe OKRs are connected to performance reviews — they set easy goals to protect themselves. The guide should: clearly separate OKRs (team performance tool) from performance reviews (individual performance tool), explain what data from OKRs can and cannot be used in performance reviews (context about what the team achieved is relevant; OKR scores are not a rating), and design the performance review to assess individual behavior and contribution rather than team OKR outcomes.

#### #0245 — OKR Mid-Quarter Intervention

Write the mid-quarter OKR intervention process for teams whose OKRs are significantly off track (confidence below 5/10 by week 6 of a 13-week quarter). The intervention should: distinguish between KR that are off track due to execution issues (the team is not doing the right things) vs. resource issues (the team doesn't have what it needs) vs. wrong goal (the KR is not the right measure), design the intervention for each root cause, and define the escalation path for KR that have company-level implications (a KR that is essential for a product launch or a customer commitment needs CEO-level attention).

#### #0246 — OKR for Finance Teams

Write the Q3 OKRs for a 7-person finance team at a 300-person SaaS company. The finance team's priorities are: complete the annual audit preparation (target: no material weaknesses, audit complete by day 60 of Q4), improve financial forecast accuracy (current 88%, target 93%), and automate the monthly close (reduce close time from day 10 to day 7). Write 3 Objectives with 3 KR each. Finance OKRs are especially prone to activity-based KR — ensure each KR is an outcome.

#### #0247 — OKR System Metrics

Write the metrics for measuring the OKR system itself. A company that uses OKRs should track: OKR completion rate (% of teams with OKRs submitted by the deadline), OKR check-in rate (% of teams doing weekly check-ins), OKR quality score (from the quality audit), company OKR achievement rate (quarterly average scores), and employee sentiment toward OKRs (from the annual engagement survey). Write the benchmarks for each metric and what a healthy vs. unhealthy OKR system looks like.

#### #0248 — OKR for Regulatory Affairs Teams

Write the OKR guide for regulatory affairs teams in highly regulated industries (pharma, financial services, healthcare). Regulatory timelines are often externally driven — the regulatory agency sets the timeline, not the team. OKRs that depend on external decisions (FDA approval, regulatory clearance) are unusual because the team's effort is within their control but the outcome is not. The guide should: focus OKRs on the inputs the team controls (submission quality, response time to agency inquiries, regulatory strategy preparation), use milestone KR rather than outcome KR where external timelines govern, and celebrate the preparation that leads to approvals even when the approval cycle extends beyond the OKR quarter.

#### #0249 — OKR for Customer-Facing Teams (Joint OKRs)

Write the guide for setting joint OKRs with customers (for strategic accounts or partnerships). Joint OKRs are a powerful tool for aligning the vendor and customer toward shared outcomes. The guide should: define what makes a joint OKR appropriate (strategic partnerships, \$500K+ accounts, new product implementations), describe the joint OKR setting process (co-creation workshop with the customer), the governance for tracking and reporting joint OKRs (shared dashboard, joint QBR), and the benefit to the vendor (joint OKRs increase stickiness and expansion likelihood).

#### #0250 — OKR Impact Measurement

Write the end-of-year OKR impact measurement methodology. The question the CEO and board want answered: 'Are OKRs making our company better?' Measuring OKR impact is harder than measuring OKR process compliance. The methodology should: compare key business metrics (ARR growth, NRR, employee engagement) in years before OKRs vs. after OKRs, survey managers and ICs on perceived value of OKRs, assess the quality of cross-functional coordination (a leading indicator of OKR effectiveness), and produce a 'verdict' on whether the OKR system is delivering value or needs to be redesigned.

### #0251 — OKR for Innovation Projects

Write the OKR framework for innovation projects with uncertain outcomes. Innovation by definition produces results that cannot be fully predicted. Standard OKRs require measurable targets — but in early-stage innovation work, you often don't know what 'success' looks like yet. The framework should: use learning KRs (what hypotheses will we test? what will we learn?), separate exploration OKRs from exploitation OKRs (use different metrics for early-stage vs. scaling), and design the stage-gate within the OKR framework (at the end of Q1, decide whether to continue, pivot, or stop the innovation based on what was learned).

### #0252 — OKR Leadership Accountability

Write the leadership accountability framework for OKRs. If leaders set OKRs but are not held accountable for them, the system loses credibility. The framework should: define the accountability mechanism for each level (IC accountability is in 1:1 meetings; team accountability is in team retrospectives; company accountability is in all-hands), distinguish between accountability for the OKR outcome (meeting the number) and accountability for the OKR process (did the team do what they committed to do?), and create the consequence framework (not punitive, but 3 consecutive missed OKRs by the same team triggers a management conversation).

### #0253 — OKR Data Strategy

Write the OKR data strategy. OKRs are only as good as the data behind the KRs. If a KR measures NPS but the NPS survey runs once a year, you cannot assess weekly progress. The data strategy should: audit the data availability for every KR (where does the data come from? how fresh is it? who owns it?), identify KRs with insufficient data infrastructure (these must be redesigned or the data infrastructure must be improved), create the data ownership model (each KR has a data owner responsible for accuracy), and integrate OKR data feeds with the OKR tracking tool (auto-update KR progress from the source system weekly).

### #0254 — OKR Coach Role Definition

Write the OKR coach role definition and selection criteria. Some companies appoint internal OKR coaches (also called OKR champions or OKR leads) to support teams in setting and executing their OKRs. The role should: provide coaching to team leads during OKR setting (not write the OKRs for them — coach the thinking), facilitate the quarterly retrospective for teams that struggle, maintain the OKR quality standards, train new managers on OKR best practices, and serve as the first point of escalation for OKR questions. Select criteria: excellent communicator, trusted by their peers, strong systems thinking, personally experienced with OKRs.

### #0255 — OKR Communication to New Hires

Write the OKR onboarding module for new hires. New employees arrive mid-cycle and need to understand OKRs immediately. The module should: explain the OKR philosophy (why we use OKRs, how they connect to our mission), show the current cycle's company and team OKRs, explain what the new hire is expected to contribute to (they contribute to team OKRs, not individual OKRs in their first quarter), introduce the weekly check-in process, and schedule a meeting with the team's OKR lead in week 1. Duration: 45-minute module included in week-1 onboarding.

### #0256 — OKR Scoring Philosophy

Write the OKR scoring philosophy guide. The 0.0-1.0 scoring scale is misunderstood in most companies. Key principles: 0.7 on an ambitious KR is success (not failure); 1.0 on every KR suggests the goals were too easy; and the distribution of scores across the company should follow a bell curve (most teams at 0.6-0.8, some at 0.9-1.0, some at 0.4-0.6). Write the scoring guide with the scoring definitions for each decile and the language to use when reporting scores to prevent defensiveness.

### #0257 — OKR Benchmark Study

Write the methodology for benchmarking the company's OKR maturity against peer companies. Dimensions to benchmark: OKR adoption rate (% of employees with OKRs), check-in frequency, OKR quality score, cross-functional dependency management maturity, and OKR-to-strategy connection. Sources for benchmarking: Perdo's State of OKRs report, Workboard industry benchmarks, and peer company conversations at HR and strategy conferences. Write the methodology, the data collection approach, and the scoring framework.

### #0258 — OKR System Annual Review

Write the annual OKR system review process. Each year, the OKR system itself should be assessed: is it serving the company well? The review should cover: engagement with the OKR process (are people participating or just complying?), quality of goal-setting (have OKR scores improved?), business impact (has OKR adoption correlated with better performance?), and employee sentiment (what do employees think of OKRs?). Write the review process, the survey instrument, and the criteria for deciding whether to continue, evolve, or replace the OKR system.

### #0259 — OKR Documentation Template

Write the OKR documentation template for a team. The template should capture: the team name, the quarter, the team's context (what is the team responsible for and what are the key constraints this quarter?), each Objective with its rationale (why is this the right objective?), each Key Result with its baseline, target, data source, and owner, the dependencies (what does this team need from other teams?), and the confidence rating at week 1 (how confident are we that these OKRs are achievable?). One page per team per quarter.

### #0260 — OKR Facilitation Certification

Write the OKR facilitation certification program for internal OKR coaches. Certified OKR facilitators can run: OKR kick-off workshops, OKR mid-quarter health checks, and OKR retrospectives. The certification requires: completing a 4-hour OKR facilitator training, co-facilitating 2 OKR workshops with a senior OKR coach, and passing a practical assessment (facilitate a simulated OKR kick-off). Write the training curriculum, the assessment criteria, and the recertification requirement (annual).

### #0261 — OKR Reset Process

Write the OKR reset process for a team whose OKRs have become irrelevant mid-quarter due to a major business change. A product launch was delayed, a key customer churned, or a new priority emerged — making the current OKRs wrong. The reset process: the team proposes revised OKRs to their manager with a written rationale (why the current OKRs are no longer relevant), the manager approves the reset, the revised OKRs are documented with the reason for the reset, and the original OKRs are preserved for retrospective learning. The reset should take no more than 3 business days.

### #0262 — OKR Reporting to Investors

Write the guide for using OKR language in investor communications. Investors increasingly want to see evidence of operational excellence, not just financial results. OKR-informed investor communication should: share the company-level OKR scores from the past year (with context), use OKR language to explain what the company set out to do vs. what it achieved, and connect OKR achievement to financial performance. Avoid: sharing granular team-level OKRs (too much detail), treating every OKR miss as a failure narrative (explain the learning), and using OKR scores as a substitute for business outcome data.

## SECTION 03

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121 unique prompts for senior executives

### #0263 — Market Entry Memo — CREATE Format

Context: You are the Chief Strategy Officer of a US-based B2B cybersecurity SaaS company (\$200M ARR, 1,200 employees). The CEO has asked for a board-ready memo on whether to enter the UK and Germany markets in 2026. You have: \$15M earmarked for international, existing customers in both markets (30 in UK, 12 in Germany), and no local office or team. Request: Write a 4-page strategic entry memo covering: (1) market opportunity sizing — UK and Germany cybersecurity SaaS TAM and addressable share, (2) go-to-market model recommendation (direct vs. channel vs. partnership), (3) build vs. acquire assessment, (4) 18-month phased plan with investment and headcount, (5) key risks and mitigations, (6) recommendation with clear decision criteria. Adjustments: Lead with the recommendation. The CEO and board have limited patience for buildup. Use a table for the financial model. Reference at least one comparable company expansion as a benchmark. Tone: Strategic and assertive. This memo should make the decision easier, not harder.

### #0264 — Competitive Response Strategy Memo — One-Shot

A major competitor just launched a product feature that directly competes with your core offering. Write the competitive response memo for the executive team. Format example from a similar situation (Salesforce responding to HubSpot's CRM launch, fictional): 'COMPETITIVE RESPONSE: HubSpot CRM Launch Threat Assessment: HIGH for SMB segment (<\$50K ACV), MEDIUM for mid-market. HubSpot's pricing is 40% below ours in the SMB tier. Immediate Actions (0-30 days): [3 specific actions] Product Response (30-90 days): [accelerated features] Commercial Response (immediate): [pricing and packaging adjustments] Sales Enablement: [battle card update, competitive training] Monitor: [what we will watch to reassess threat level]' Now write the competitive response memo for this situation: A well-funded startup has launched an AI-native contract management tool that integrates with Salesforce and costs 60% less than your legacy contract platform. Three enterprise prospects mentioned it in the past 2 weeks.

### #0265 — Digital Transformation Strategy Memo — Few-Shot

Write a digital transformation strategy memo for a traditional insurance company that wants to build AI capabilities. The memo should be 3 pages, executive-level, and result in a clear leadership decision. Examples of what makes strategy memos persuasive: Example 1 — strong framing: 'The question is not whether to invest in AI — three of our four main competitors have already announced AI roadmaps. The question is whether we move decisively in 2026 or cede 24 months of advantage.' Example 2 — strong structure: Use the 'Situation → Complication → Question → Answer' (SCQA) framework: What is happening (situation)? What is changing that makes this urgent (complication)? What decision do we need to make (question)? What should we do (answer)? Example 3 — strong recommendation: 'We recommend Option B: invest \$8M in an AI-assisted underwriting platform over 18 months, delivered by a dedicated team of 12 (8 internal, 4 contracted). This is projected to reduce underwriting time from 4 hours to 35 minutes per policy, saving \$4.2M annually by year 3. We do NOT recommend Option A (build from scratch) because...' Now write the full digital transformation strategy memo.

### #0266 — Build vs Buy vs Partner Decision Memo — CREATE Format

Context: Your company (a 600-person healthcare data company) needs an AI model to extract structured data from unstructured clinical notes. You have 3 options: (1) Build in-house — 6 ML engineers, 12 months, \$3M; (2) Buy — acquire a clinical AI startup for \$15M; (3) Partner — license a model from an existing clinical AI vendor at \$800K/year with a 3-year minimum. Request: Write the executive decision memo that recommends one option. Structure it as: executive summary with recommendation first, context and background, evaluation criteria with weightings, option analysis against each criterion, financial comparison table, risk assessment, and implementation timeline for the recommended option. Adjustments: The company has a 5-year exit strategy (likely M&A;). Acquired IP is valued by potential acquirers. This context should influence the recommendation. Tone: Decisive. The CEO is tired of analysis — they want a clear recommendation with clear reasoning, not a balanced 'it depends' answer.

### #0267 — M&A; Rationale Memo — One-Shot

Write the M&A; rationale memo for a \$45M acquisition of a smaller competitor. The memo will be reviewed by the board. Format your memo using this structure: 'ACQUISITION RATIONALE: [Target Company] Strategic Fit (2 paragraphs): Why this acquisition advances our 3-year strategy Financial Case (1 table + 1 paragraph): Purchase price, revenue multiple, synergies, payback Risk Assessment (3 bullet risks with mitigations): Deal, integration, and market risks Integration Approach (1 paragraph): 90-day integration plan summary Board Ask: The specific approval required from the board today' Write the full memo for this deal: We are acquiring a 50-person AI data labeling company. They have \$8M ARR, growing 45% YoY, with 20 enterprise customers who overlap with our customer base. Purchase price: \$45M (5.6x revenue). Expected synergies: cross-sell to their customer base (\$4M ARR opportunity) and cost savings of \$1.2M/year by consolidating overlapping teams.

### #0268 — AI Investment Business Case — Chain-of-Thought

The CFO has asked for a business case for investing \$2.5M in deploying an AI copilot for the 200-person finance team. Walk me through how to build this business case step by step. Step 1: Identify the cost savings. What categories of work does the finance team do that AI can accelerate or automate? Be specific — not just 'report writing' but which reports, how long they take, how much time could be saved. Step 2: Identify the quality improvements. Where does the current process have quality gaps that AI can reduce? Give 3 specific examples. Step 3: Build the financial model. What inputs do I need? What assumptions do I need to make transparent? What does the NPV/IRR/payback period calculation look like? Step 4: Identify the risks and how to quantify them in the business case. Step 5: What does 'success' look like at 6 months, 12 months, and 36 months? How will we measure it? Work through each step, then produce the draft business case executive summary.

### #0269 — Cost Reduction Strategy Memo — Role-Based

Act as a McKinsey senior partner who specializes in operational efficiency for technology companies. The CFO has engaged you to write the cost reduction strategy memo. Context: A 1,500-person SaaS company has EBITDA of -22% and the board wants a path to +10% EBITDA in 18 months without destroying growth (target: maintain 25% revenue growth). Current cost structure: 42% R&D; 38% S&M; 12% G&A; 8% COGS. Write the cost reduction strategy memo covering: 1. Diagnosis: where is cost relative to benchmarks for a 25% growth SaaS company? 2. Opportunity sizing: where are the highest-ROI cost reduction opportunities? 3. The three options (cost-cutting vs. efficiency vs. growth investment reallocation) 4. Recommended path: phased plan with monthly EBITDA improvement milestones 5. What NOT to cut: the protected investments that would destroy growth if reduced Use data, benchmarks, and be direct about trade-offs. The board will not accept a soft answer.

### #0270 — Pricing Strategy Overhaul Memo — One-Shot

Write the pricing strategy overhaul memo for a B2B SaaS company that has had the same 3-tier pricing model for 4 years and is now losing deals to cheaper competitors and leaving money on the table with enterprise customers. Example of pricing memo structure that gets C-suite buy-in: 'Current State: Our \$199/\$499/\$999/month tiers have not been updated since 2021. In the past 12 months, we lost 23 deals citing price as the primary factor, and our NRR is 112% vs. industry benchmark of 118%, suggesting we are not capturing enterprise value adequately. Opportunity: Two distinct issues — (1) the entry-level is too expensive for SMB adoption (blocking top-of-funnel), and (2) enterprise lacks a usage-based component that rewards expansion. Recommendation: Three changes — (1) add a freemium tier at \$0/month with limited features, (2) introduce outcome-based pricing for enterprise (per-outcome fees), (3) annual pre-pay discount of 20%. Projected impact: [numbers].'

Write the full pricing overhaul memo for a project management SaaS company.

#### #0271 — Partnership Strategy Memo — Few-Shot

Write a strategic partnership memo recommending a formal go-to-market partnership with a major cloud hyperscaler (AWS, Google Cloud, or Azure — choose the most appropriate for context). Examples of partnership memo value propositions that work: For technology companies: 'The AWS partnership offers three concrete benefits: (1) marketplace listing reduces our average procurement cycle from 90 days to 14 days for AWS-native enterprises; (2) co-sell agreement with 200 AWS enterprise AEs multiplies our sales capacity without headcount; (3) joint solution blueprint gives us preference in 3 AWS industry verticals where we have no presence today.' For services companies: 'The Google Cloud partnership unlocks: (1) \$500K in partner credits that fund our internal migration to GCP (saving \$180K/year); (2) access to Google's 2,000-person enterprise sales team as a referral channel; (3) co-marketing budget of \$150K for joint event sponsorship.' Now write the full partnership strategy memo for a cybersecurity company evaluating an AWS partnership.

#### #0272 — Innovation Pipeline Review Memo — Role-Based

Act as a Chief Innovation Officer presenting to the board. Write the Q3 innovation pipeline review memo for a traditional retail company with \$4B in revenue that is 2 years into a digital transformation. The company has 15 innovation pilots running. The board wants to see: which pilots should be scaled, which should be killed, and whether the innovation investment (\$20M/year) is generating adequate return. Structure the memo as a portfolio review: 1. Innovation portfolio summary table (project, status, investment, expected return, go/no-go recommendation) 2. The 3 pilots to scale (why, investment needed, expected return) 3. The 4 pilots to kill (why, and how to do it constructively) 4. The 2 new investment priorities for Q4 5. Portfolio ROI assessment: is \$20M well spent? Be direct about the kill decisions — show the board you are managing toward return, not just managing activity.

#### #0273 — Zero-Based Budgeting Introduction Memo

Write a 2-page memo from the CFO to all department heads introducing zero-based budgeting for the first time. Explain: what ZBB is, why the company is adopting it (current budget process no longer drives prioritization), what changes in the budgeting process this year, what each department head needs to prepare, and the timeline. Tone: direct and honest — acknowledge ZBB is harder than incremental budgeting but explain why it produces better outcomes.

#### #0274 — AI Strategy for a Manufacturing Company

Write a 3-page AI strategy memo for a \$500M manufacturing company that has no AI capabilities today. The CEO wants to understand where AI creates the highest-value opportunities in manufacturing, what a realistic 2-year investment plan looks like (\$5M budget), and what the company needs to do first before deploying AI. Use specific manufacturing AI use cases: predictive maintenance, quality control, supply chain optimization, demand forecasting. Lead with the recommendation.

#### #0275 — Geographic Expansion Risk Assessment

Write a risk assessment memo for expanding into Southeast Asia (starting with Singapore). Cover: market entry risks (regulatory, cultural, competitive), operational risks (legal entity setup, hiring local talent, currency), financial risks (transfer pricing, tax, FX hedging), and strategic risks (management bandwidth, distraction from core market). For each risk, rate the likelihood and impact, and describe the mitigation. Conclude with a go/no-go recommendation.

#### #0276 — Platform vs. Product Strategy Memo

Write the strategic choice memo on whether the company should pursue a platform strategy (opening APIs, building an ecosystem) or remain a focused product company. The company is \$80M ARR in project management software with 3,000 customers. Structure: what platform strategy means and requires, what staying product-focused means, 3 criteria for choosing between them, financial projections for each path over 5 years, and a recommendation. This is a foundational strategic choice — treat it with appropriate weight.

### #0277 — Post-Merger Integration Strategy Memo

Write the 90-day post-merger integration strategy memo for a \$50M acquisition that closed last week. The acquired company has 80 employees, a different culture (startup vs. enterprise), overlapping customer segments, and partially overlapping product features. Cover: integration governance (who leads, how decisions are made), customer communication plan, employee integration (what stays separate, what consolidates), product integration roadmap, and the key risks that could derail a successful integration.

### #0278 — AI Vendor Selection Strategy Memo

Write the strategy memo for selecting between three AI vendors for enterprise customer support automation. Vendor A: large incumbents (Salesforce Einstein), expensive, proven. Vendor B: AI-native startup with better NLP accuracy but 18 months old. Vendor C: hyperscaler (Google CCAI), full integration with existing stack, higher setup cost. Create a 5-criterion evaluation framework, apply it to all three vendors, and recommend one. Include the total cost of ownership comparison over 3 years.

### #0279 — Organic vs Inorganic Growth Decision

The company is at an inflection point — \$100M ARR, growing 20% organically. To hit the board's 35% growth target, management believes it needs either a major acquisition or a new product line. Write the memo assessing organic growth options (new products, new markets, new channels) against inorganic options (acquisition targets at realistic multiples). Recommend which path to pursue and why. Include the financial model showing how each path gets to 35% growth.

### #0280 — Vertical Market Focus Memo

The company currently sells to 12 different industries with no specialization. A strategic review suggests focusing on 3 verticals could double win rates and NRR. Write the vertical focus strategy memo: how to select the top 3 verticals (criteria: market size, fit to product, competitive intensity, existing traction), what 'going vertical' requires (sales specialization, marketing, product), the cost and revenue impact of the transition, and the risks of de-prioritizing other verticals.

### #0281 — ESG Strategy Memo for Board

Write the ESG strategy memo for a technology company responding to increasing investor and regulatory pressure. Cover: what ESG commitments competitors have made (benchmark), where the company currently stands (honest gap assessment), the recommended 3-year ESG roadmap (environmental: net zero target and carbon reduction plan; social: DEI targets and supplier standards; governance: AI ethics and data privacy), the cost to implement, and the reputational and regulatory risk of inaction.

### #0282 — Customer Concentration Risk Strategy Memo

The company's top 5 customers represent 65% of revenue. The board has flagged customer concentration as a top 3 strategic risk. Write the customer concentration risk strategy memo: quantify the risk (what happens to revenue and valuation if the largest customer churns), identify the root cause (sales motion biased toward large deals, product designed for enterprise), and recommend a 2-year diversification strategy that reduces top-5 concentration to below 40% without sacrificing enterprise growth.

### #0283 — Freemium Launch Decision Memo

Write the decision memo for launching a freemium tier of the company's product. The company is a B2B SaaS business with \$70M ARR, currently no free tier. Arguments for: faster top-of-funnel, product-led growth, competitive pressure. Arguments against: support cost, brand perception, cannibalizes paid, requires product architecture changes. Evaluate both sides rigorously and make a recommendation. Include the financial model showing the 3-year impact on ARR, cost structure, and payback period.

#### #0284 — Annual Strategic Planning Process Design

Design the company's annual strategic planning process. The process should run from August through October and result in a 3-year strategic plan and 1-year operating plan presented to the board in November. Define: the phases (environmental scan, strategic choices, resource allocation), the key inputs (market data, competitive intelligence, financial model, scenario planning), the participants and their roles, the decision-making process, and the outputs at each phase. Include a calendar and a governance structure.

#### #0285 — Pivot Announcement Memo

Write the all-company announcement memo for a strategic pivot. The company is moving from selling to SMBs to exclusively targeting enterprise customers. The memo should explain the business logic clearly (without suggesting the SMB strategy was a mistake), acknowledge the impact on current SMB customers, explain what changes for employees (sales motion, pricing, product priorities), and set the tone for why this is an exciting shift rather than a retreat. Max 400 words. CEO voice.

#### #0286 — AI vs. Human Competitive Analysis

Write the strategy memo analyzing whether AI will disrupt our product in the next 3 years. The company makes project management software. The memo should: identify the specific capabilities where AI creates substitution risk, assess the timeline and probability of disruption, evaluate our defensive position (what moats exist), and recommend 3 strategic responses ranked by confidence. Be honest — boards are better served by a realistic threat assessment than reassurance.

#### #0287 — Revenue Model Transition Memo

Write the strategic memo recommending a transition from perpetual software licenses to a SaaS subscription model. Cover: the financial impact of the transition (revenue will look like it declines for 18-24 months before recovering), the customer communication strategy, the sales team compensation redesign required, the product architecture changes needed, and the investor communication plan. Include the 5-year financial model comparing perpetual vs. SaaS revenue trajectories.

#### #0288 — Sales Capacity Model

Build a sales capacity model for a company targeting 40% revenue growth next year. Start from the revenue target, work backwards through pipeline coverage (3x), win rate (22%), average deal size (\$85K ACV), and sales cycle (90 days) to calculate how many quota-carrying reps are needed, how many must be hired and ramped in time to contribute, and the total capacity gap if hiring starts today. Show the math, then write the memo recommending the hiring plan.

#### #0289 — Channel Partner Strategy Memo

Write the strategic memo recommending the company launch a channel partner program. The company currently sells direct (100%). Competitors have 20-30% of revenue through partners. The memo should: make the case for channel (TAM access, geographic reach, reduced CAC), the case against (margin dilution, channel conflict, partner management cost), the recommendation on which partner types to recruit first (VARs, SIs, technology partners), and the 12-month build plan.

#### #0290 — Market Sizing Report

Write the total addressable market (TAM) sizing report for an AI-powered HR technology product. Use both top-down (total HR tech market x penetration rate) and bottom-up (target companies x average ACV) approaches. Show your assumptions clearly. Be conservative — investors distrust inflated TAMs. The product serves companies with 100-2,000 employees doing automated employee onboarding. Calculate TAM, SAM (serviceable addressable market), and SOM (serviceable obtainable market) for years 1, 3, and 5.

### #0291 — Brand Positioning Memo

Write the brand positioning strategy memo for a B2B AI company entering a crowded market. The memo should: audit the current positioning of the top 5 competitors (using their own language), identify the white space, propose a differentiated positioning statement, test the positioning against 3 target buyer personas, and recommend the messaging architecture (company message, product message, buyer-persona messages). The positioning must be defensible — not just a tagline, but a point of view we can own.

### #0292 — Sales and Marketing Alignment Memo

Write the memo addressing the chronic misalignment between the Sales and Marketing teams. Specific symptoms: Marketing generates MQLs that Sales ignores, Sales says leads are low quality, Marketing says Sales doesn't follow up. The memo should: quantify the impact (how much revenue is being left on the table), identify the root causes on both sides (without assigning blame), propose a shared 'revenue engine' framework with joint KPIs, a new SLA between the teams, and a governance structure for resolving disagreements.

### #0293 — Product-Market Fit Assessment

Write the product-market fit assessment memo for the board. Use Sean Ellis's benchmark: 'How disappointed would you be if you could no longer use this product?' If >40% say 'very disappointed,' you likely have PMF. The company's score is 31%. The memo should: contextualize the score, identify which customer segments show stronger PMF (some segments likely above 40%), recommend whether to accelerate growth or improve retention first, and define the 3 product changes most likely to improve PMF in the highest-potential segment.

### #0294 — Scenario Planning Framework

Write the scenario planning memo for the leadership team's annual strategy process. The memo should introduce 3 macro scenarios for the next 3 years: Base (current macro trajectory continues, 5-8% GDP growth in target markets), Downside (recession, tighter enterprise budgets, slowed AI adoption), Upside (AI adoption accelerates dramatically, labor productivity surge creates demand). For each scenario, describe: the key assumptions, the impact on your market, and the 3 strategic responses the company should be ready to execute.

### #0295 — Strategic Narrative for Fundraising

Write the strategic narrative for a Series B fundraising process. The narrative is the first 10 minutes of the founder pitch. The company: AI-powered supply chain optimization, \$12M ARR, 120% NRR, targeting \$50M raise. The narrative must answer: Why this problem, why now, why us, why this market wins, and what we do with \$50M. Use the 'hero's journey' structure: the world before, the problem, our insight, our solution, evidence it works, the vision. Write it as a presentation script, not a document.

### #0296 — Go-to-Market Segmentation Strategy

Write the go-to-market segmentation strategy memo. The company currently sells to everyone — no ICP (Ideal Customer Profile) defined, which means the sales team wastes 40% of their time on prospects who rarely buy. The memo should: propose a segmentation methodology (by industry, company size, technology stack, buying trigger), analyze the current customer base to identify the best-fit segments, define 2 primary ICPs with specific firmographic and behavioral criteria, and show the impact on sales efficiency if the team focused exclusively on these ICPs.

### #0297 — Acquisition Target Profile

Write the acquisition target profile for the company's M&A; team. The company is a \$200M ARR SaaS platform that wants to add AI capabilities through acquisition. The target profile should define: the ideal target size (\$20M-\$80M ARR), the technology characteristics (AI/ML core, not AI-washed), the customer characteristics (enterprise with contracts, not consumer), the team requirements (must retain founding technical team post-acquisition), the financial characteristics (growing >50%, not requiring >5x revenue multiple), and the strategic rationale framework (fill product gap vs. acquire customers vs. acquire talent). Generate a list of 5 hypothetical target companies that would fit this profile.

### #0298 — Pricing Power Analysis

Write the pricing power analysis for the annual strategy review. The memo should assess: our pricing relative to the market (are we above or below peers?), customer willingness to pay (what does our win/loss data tell us?), the impact of a 10% price increase on win rate (data-driven estimate), the segments where we have most pricing power, the segments where we are most price-sensitive, and the recommendation on whether to raise prices in the next renewal cycle and by how much. Include the financial impact model of a 10% and 20% price increase scenario.

### #0299 — International Expansion Priority Matrix

You have identified 8 possible international markets. Write the market prioritization analysis using a scoring framework. For each market (UK, Germany, France, Japan, Australia, Canada, UAE, Singapore), score on: market size for your product (1-5), ease of market entry — regulatory, legal, language barriers (1-5, higher = easier), strength of competitive set (1-5, higher = weaker competition), cultural fit with your product (1-5), and presence of existing customers who could serve as references (1-5). Show the weighted scoring matrix and recommend 2 markets to enter in year 1 with rationale.

### #0300 — Innovation Budget Allocation

Write the strategic framework for allocating the company's \$5M innovation budget across 3 time horizons: Core (improving existing products and operations), Adjacent (expanding into related markets and products), and Transformational (building the business of the future). McKinsey research suggests a 70/20/10 split, but this varies by industry and stage. Make a recommendation for the appropriate split for a 7-year-old enterprise SaaS company, justify the rationale, and show how specific budget line items map to each horizon.

### #0301 — AI Risk Materiality Assessment

Write the AI risk materiality assessment for a regulated financial services company deploying AI. The assessment should: identify all AI systems in production, classify each by potential for financial harm, operational disruption, regulatory penalty, or reputational damage, score materiality using a 2x2 (impact x probability), identify the top 3 material AI risks requiring immediate board disclosure, and recommend the governance response for each material risk. The output will be included in the next board risk report.

### #0302 — Customer Success Expansion Strategy

Write the expansion revenue strategy memo. The company has \$80M ARR with NRR of 108%. Benchmark NRR for top SaaS companies is 120%+. The memo should: diagnose why NRR is lower than benchmark (lack of expansion playbook? product doesn't expand naturally? CSMs focused on retention not growth?), propose 3 expansion motions (upsell to higher tier, cross-sell new product, expand seats/users), define the expansion metrics to track, and set a 12-month target to reach 115% NRR. Include the new CSM compensation model that incentivizes expansion.

### #0303 — Data Monetization Strategy Memo

Write the data monetization strategy memo for a healthcare data company that has 10 years of de-identified patient outcome data covering 2 million patients. The memo should: identify the legitimate monetization paths (research licensing, population health analytics, AI model training data, insights products), evaluate each path for revenue potential and compliance risk (HIPAA, state privacy laws), recommend a primary monetization approach, and outline the governance framework needed to monetize responsibly. Quantify the revenue opportunity for the primary path.

### #0304 — Vertical SaaS Expansion Memo

Write the strategy memo evaluating whether a horizontal project management SaaS company should launch a vertical-specific product for the construction industry. The construction vertical represents 18% of current revenue but 35% of inbound interest. The memo should: assess the vertical opportunity (construction PM market size, build cost of a construction-specific product, vs. using existing platform with light customization), the go-to-market approach (separate brand vs. feature set within main product), the organizational impact (separate product team? separate sales team?), and a recommended path with an 18-month execution plan.

### #0305 — Memo: Pricing for the AI Feature

Write the pricing memo for a new AI feature that the product team wants to launch as a premium add-on at \$50/user/month. The memo should: evaluate the competitive pricing landscape (what are peers charging for similar AI features?), test customer willingness to pay (what does the pilot data show?), analyze the impact on package conversion and NRR, and recommend a pricing structure and packaging strategy. Include the risk of either underpricing (leaving money on the table) and overpricing (creating adoption barriers).

### #0306 — Memo: Office Consolidation Strategy

Write the real estate strategy memo for a company that grew headcount by 50% during the pandemic and signed long-term leases, but is now 60% remote and has excess office space costing \$3.2M per year. Options: sublease excess space, consolidate to a single HQ, downsize to a co-working flex arrangement, or terminate leases early (with penalty cost). Write the memo recommending the path that best balances cost savings, employee experience, and operational flexibility.

### #0307 — Memo: Transition to Product-Led Growth

Write the strategic memo for transitioning from a sales-led to a product-led growth (PLG) motion. The company currently closes 100% of revenue through the sales team with no self-serve option. PLG requires a freemium or free trial model where users adopt the product before talking to sales. The memo should: define what PLG means in the context of this product, the investments required (product, marketing, data instrumentation), the risks (cannibalizing sales pipeline, margin impact), and a phased transition plan that does not destroy the existing sales motion while building the PLG channel.

### #0308 — Memo: Reduce Engineering Cycle Time

Write the engineering efficiency memo for a CTO who wants to reduce time from feature inception to production from 90 days to 45 days. The memo should: diagnose where time is spent (discovery → spec → build → test → deploy → monitor), identify the 3 biggest bottlenecks in the current process, propose specific process changes for each bottleneck, quantify the business impact of the improvement (faster feature delivery → better product-market fit → higher NRR), and recommend an implementation approach that does not disrupt current commitments.

### #0309 — Memo: Talent Acquisition Strategy Shift

Write the talent strategy memo recommending a shift from traditional job boards to community-led talent acquisition. The company spends \$800K/year on Indeed, LinkedIn, and agency fees, with declining quality of applicants and time-to-fill increasing. The memo should: diagnose the root cause of the decline in quality, propose community-based alternatives (GitHub, developer conferences, open source contributions, podcast sponsorships), model the cost comparison, and recommend a 6-month test approach.

### #0310 — Memo: Customer Pricing Tier Simplification

Write the strategic memo recommending a simplification of the company's pricing from 6 tiers to 3. The current 6-tier structure was built incrementally and is now confusing to customers and internal teams. The memo should: document the problems with the current structure (sales cycles longer due to confusion, CSMs spend 20% of time on tier questions, customers feel locked into tiers that don't fit), propose the new 3-tier structure with clear differentiation, address the transition plan for existing customers, and model the revenue impact.

### #0311 — Memo: Strategic Response to New Entrant

A well-funded startup just launched a product that directly competes with your company's most profitable line (\$60M ARR). Write the threat assessment and strategic response memo. The memo must avoid two failure modes: (1) overreacting and defocusing the company, (2) underreacting and losing market share. Cover: threat level assessment, short-term defensive actions, medium-term product investments, and the strategic narrative for customers and the sales team.

### #0312 — Memo: Sustainability Investment Case

Write the business case for investing in sustainability initiatives. The company (\$500M revenue, manufacturing sector) is under increasing pressure from: enterprise customers with Scope 3 emissions reporting requirements, institutional investors with ESG mandates, and regulatory requirements. The investment case should: quantify the revenue at risk if the company does not meet customer ESG requirements, calculate the cost of required sustainability investments (renewable energy transition, supply chain emissions measurement, ESG reporting), and show the net financial impact over 5 years.

### #0313 — Memo: Organizational Restructuring for AI

Write the organizational restructuring memo for moving from a functional organization (separate engineering, product, design, data teams) to cross-functional AI product squads. The company has found that their current structure slows AI product development because cross-team coordination takes too long. The memo should: describe the proposed squad model, address the people implications (managers' roles change significantly), explain the governance model for shared services (infrastructure, data platforms), and propose a 6-month transition plan that minimizes disruption to current projects.

### #0314 — Memo: Sales Compensation Redesign

Write the sales compensation redesign memo. Current issues: the current plan overweights new logo acquisition (creating a 'churn and burn' mentality) and underweights expansion and customer health. The new plan should: align compensation to long-term customer value, maintain quota-carrying competitive base pay, introduce a customer health component for CS-aligned AEs, and simplify the plan to reduce comp disputes. Include the financial model showing total comp cost under the old vs. new plan at different performance levels.

### #0315 — Memo: AI Product Strategy

Write the 2026 AI product strategy memo for a product leader at a company whose product does NOT yet have AI features but whose top 3 competitors all announced AI features in the past 6 months. The memo should: be honest about the competitive gap and customer perception, evaluate 3 strategic options (build AI features internally, white-label a third-party AI layer, redesign product architecture to be AI-native), recommend one option with a clear 18-month delivery plan, and quantify the revenue risk of remaining AI-free versus the development cost of each option.

### #0316 — Memo: Freemium Launch Decision

Write the strategic decision memo for adding a freemium tier to a \$40M ARR SaaS product. Arguments for: pipeline generation, brand awareness, bottom-up enterprise sales. Arguments against: free users create support cost without revenue, may cannibalize paid tiers, technical infrastructure cost. The memo should evaluate the evidence from 5 comparable companies that have launched freemium, model the cost at 3 different conversion rates (1%, 3%, 5%), and recommend a launch or no-launch decision with clear criteria for reversing the decision.

### #0317 — Memo: Merger Integration Strategy

Write the Day 1 through Day 100 integration strategy memo for a tuck-in acquisition. The acquired company (30 people, \$5M ARR) is being integrated into the parent company (\$150M ARR). Integration priorities in order: (1) cultural integration (keep the founding team, preserve what made them successful), (2) customer communication (no disruption to acquired customers), (3) product integration (timeline for migrating acquired product to parent platform), (4) financial integration (consolidation of finance, HR, legal systems). Write the 100-day integration plan.

### #0318 — Memo: Market Exit Evaluation

Write the strategic memo evaluating exiting a market. The company sells in 14 countries. Three markets (Argentina, Greece, and Vietnam) collectively generate \$2M ARR but require 15% of engineering resources for localization, 2 dedicated support staff, and compliance costs in all three jurisdictions. Write the exit analysis: cost savings from exit, revenue impact (what can be saved by migrating customers to other markets?), strategic impact (what signal does market exit send to customers and investors?), and recommendation.

### #0319 — Memo: Build vs. Acquire for AI Capability

Write the build vs. acquire analysis for an AI capability the company needs. The company needs a computer vision capability for its product. Build option: 18 months, \$8M in headcount and compute. Acquire option: an AI startup specializing in computer vision is available for \$25M. The memo should evaluate: time-to-market (acquire wins), cost over 5 years (acquire costs \$25M upfront, build costs \$40M over 5 years), team risk (acquired team may leave), and integration risk. Recommend.

### #0320 — Memo: Customer Concentration Risk

Write the strategic memo addressing customer concentration risk. The company's top 3 customers represent 47% of ARR. If any one of them churns, it would be a material event. The memo should: quantify the concentration risk at current levels, set the target concentration ceiling (largest customer: 15%, top 5 customers: 40%), propose the strategic plan to reduce concentration over 3 years, and address the tension between concentration reduction and ARR growth (reducing concentration while growing requires signing many new customers — is this achievable?).

### #0321 — Memo: Geographic Expansion Sequence

Write the strategic memo for sequencing international expansion. The company is US-based with \$80M ARR. The board is asking which market to enter next. Evaluate 3 options: UK/Europe (large market, but GDPR compliance cost and competitive market), Southeast Asia (growing market, lower competition, but higher support cost and currency risk), and Canada (proximity, similar culture, easy to support — but smaller incremental market). Write the market prioritization framework and recommend the sequence.

### #0322 — Memo: AI-First Product Redesign

Write the strategic memo for redesigning the product to be AI-first rather than adding AI features to an existing product architecture. This is a bet-the-company decision: the AI-first redesign will take 18 months and require significant resources, during which the current product must be maintained. Arguments for: competitive differentiation, ability to charge premium pricing, architectural advantages. Arguments against: execution risk, customer confusion during transition, resource drain. The memo must be honest about both the opportunity and the risk.

### #0323 — Memo: Pricing Power Assessment

Write the strategic memo assessing the company's pricing power before the annual price increase decision. Pricing power factors: Net Revenue Retention (high NRR suggests customers are getting value and will accept price increases), churn rate response to past price increases (data from 2 years ago when prices were raised 10%), customer willingness-to-pay research (survey results), competitive pricing comparison (are we priced above or below market?), and gross margin assessment (is there room to invest in value without raising prices?). Conclude with: how much can we raise prices this year?

### #0324 — Memo: Partner Channel Investment

Write the strategic memo for investing in a partner channel. The company currently generates 5% of revenue from partners. The proposal: hire 5 channel account managers (\$1.5M annual cost), launch a formal partner program (portal, certification, co-marketing), and set a target of 25% of revenue from partners in 3 years. The memo should model the CAC comparison (partner-sourced customers typically have 60% lower CAC), the margin impact (partners require 20-30% revenue share), and the execution risk (channel programs take 18-24 months to produce meaningful revenue).

### #0325 — Memo: Remote Work Strategy

Write the strategic memo establishing the company's permanent remote work policy. The company went fully remote in 2020 and has been operating remotely since. Three options: (1) remain fully remote (retain 40% remote cost savings, recruit from global talent pool), (2) hybrid mandatory (2 days/week in office — culture benefits, but talent pool narrows), (3) hub model (offices in 3 cities, employees choose to be near a hub or fully remote). Write the analysis including real estate cost, talent strategy impact, culture impact, and recommendation.

### #0326 — Memo: Upmarket Strategy

Write the strategic memo for moving upmarket — from mid-market customers (\$50K ACV) to enterprise (\$200K+ ACV). The case for upmarket: enterprise deals are larger, have lower churn, and drive NRR. The case against: enterprise sales cycles are 3x longer, require more expensive sales people, and demand enterprise-grade features the company doesn't have yet. The memo should identify the 5 enterprise features required, the sales team changes required, the pricing architecture changes required, and the timeline to first enterprise revenue.

### #0327 — Memo: Data Monetization Strategy

Write the strategic memo for a data monetization strategy. The company has accumulated 5 years of industry-specific behavioral data from 50,000 business users. Options: (1) use the data to improve the company's own AI features (no monetization, but competitive advantage), (2) sell aggregated, anonymized insights to partners (revenue: \$2-5M, risk: customer trust), (3) create a data marketplace (complex, multi-year effort), (4) create benchmarking reports (publish industry benchmarks, use as marketing). Evaluate each option legally, ethically, and commercially. Recommend.

### #0328 — Memo: Technical Debt Strategy

Write the strategic memo for addressing technical debt. Engineering estimates: \$8M in technical debt that is slowing new feature development by 40%, creating reliability incidents quarterly, and making the codebase increasingly difficult to hire for (old technology stack). Options: (1) big bang rewrite (high risk, 18 months with no new features), (2) incremental modernization (lower risk, 3 years, but slower payoff), (3) strangler fig pattern (migrate feature by feature to new architecture). Recommend option 2 or 3 with specific milestones.

### #0329 — Memo: Churn Root Cause Analysis

Write the strategic churn root cause analysis memo. The company's gross churn has increased from 8% to 14% over the past 12 months. The memo should: identify the cohorts with highest churn (by segment, acquisition channel, onboarding path), diagnose the root cause (product gaps? competitive losses? economic pressure on customers? poor customer success coverage?), quantify the financial impact of each root cause, and propose specific interventions for the top 2-3 causes with expected churn improvement from each. This memo goes to the CEO and board.

### #0330 — Memo: Employee Experience Investment

Write the strategic memo proposing \$2M in employee experience investments. The company's Glassdoor rating has dropped from 4.2 to 3.6 over 12 months, voluntary attrition has increased to 22%, and 2 recent executive hires cited culture as a concern during exit interviews. The \$2M should be allocated across: manager training (top predictor of employee experience), career development programs, compensation reviews (are we paying below market?), and physical workspace improvements. Write the ROI case: reduced attrition saves \$X per year (use 50% of replacement cost formula).

### #0331 — Memo: Open Source Strategy

Write the strategic memo for open-sourcing a core company technology component. Arguments for open-sourcing: developer community adoption, recruiting brand improvement, industry standard status. Arguments against: competitors get access to core technology, maintenance burden of open source community management, risk of fork. Evaluate case studies of 3 companies that successfully open-sourced technology (HashiCorp, Elasticsearch, PlanetScale) and 2 that struggled. Recommend with conditions.

### #0332 — Memo: Product Packaging Redesign

Write the memo proposing a product packaging redesign from seat-based pricing to usage-based pricing. Current model: \$20/seat/month, predictable revenue, but customers limit seat purchases and don't expand. Proposed model: \$0.10 per AI query (usage-based), with volume discounts. Benefits: net dollar retention should increase as customers grow usage. Risks: revenue becomes less predictable, customers may optimize usage to reduce spend. Include the transition plan for existing customers and the financial model showing expected ARR impact.

### #0333 — Memo: AI Governance Framework for Product

Write the memo establishing the AI governance framework for the product development process. Every new AI feature must go through a 5-step review: (1) use case assessment (what is the AI doing and for whom?), (2) bias and fairness review (what populations could be harmed?), (3) privacy review (what data is used?), (4) explainability assessment (can we explain the AI's outputs?), (5) post-launch monitoring plan (how do we detect problems after launch?). Write the detailed requirements for each step and the approval process.

### #0334 — Memo: International Pricing Strategy

Write the memo on international pricing strategy. The company currently charges the same price globally in USD. This creates 3 problems: prices are too high in developing markets (lower adoption), exchange rate fluctuations affect revenue, and international customers prefer local currency invoicing. Propose a tiered international pricing model: full price in English-speaking advanced economies, 80% in European Union, 60% in emerging markets (specific country list), with local currency invoicing in EU, UK, Australia, Canada, and Japan. Model the revenue impact.

### #0335 — Memo: Customer Data Platform Investment

Write the memo making the business case for a \$1.5M Customer Data Platform (CDP) investment. Current state: customer data is siloed across the CRM, product analytics, marketing automation, and support systems — creating an incomplete picture of each customer. With a CDP: all customer data is unified in one profile, enabling personalized marketing, predictive churn modeling, and AI-driven customer success. Write the ROI model: improved marketing ROI (10% reduction in CAC), reduced churn (1% improvement  $\times$  ACV  $\times$  customer count), and improved product decisions.

### #0336 — Memo: Legal Entity Structure Review

Write the strategic memo for reviewing the company's legal entity structure as it expands internationally. Current structure: single US C-Corp. Issues: growing UK operations require a UK entity for employment law compliance; European data processing requires an EU entity for GDPR purposes; Ireland is a tax-efficient EU entity option. The memo should describe the proposed entity structure, the tax implications, the implementation timeline and cost, and the governance requirements for a multi-entity structure (intercompany agreements, transfer pricing).

### #0337 — Memo: Competitive Response to Price War

Write the strategic memo responding to a competitor that has cut prices by 40% and is actively targeting your customers. Do not panic: price wars are often lose-lose. The memo should: assess the competitor's financial sustainability (can they sustain 40% price cuts long-term?), evaluate your customer's price sensitivity (what % would leave for a 40% cheaper option?), propose a response strategy that does not destroy your margins (focus on non-price differentiation, create a value-based pricing conversation, consider a separate low-price product tier for price-sensitive segments), and define the price war scenario where you would match prices.

### #0338 — Memo: Spin-Off Evaluation

Write the strategic evaluation of spinning off a business unit. The company operates two business lines: a \$100M ARR core product and a \$20M ARR adjacent services business. The services business has different customers, different economics, and different management requirements. Arguments for spin-off: each unit gets focused management attention, separate capital allocation, and potentially a higher combined valuation. Arguments against: shared infrastructure savings, cross-selling synergies, management bandwidth cost of managing a separate entity. Recommend.

### #0339 — Memo: Crisis Communication Strategy

Write the crisis communication strategy memo for an impending product failure disclosure. The company's AI-powered product made incorrect recommendations to approximately 2,000 business customers over a 90-day period. No customers were financially harmed, but trust is at risk. The communication strategy should: determine the disclosure timing (proactively vs. when customers discover it — recommend proactive), craft the customer communication (apologize, explain, fix, compensate), prepare media Q&A, brief the sales team on customer conversations, and design the recovery plan (what will be done to prevent recurrence?).

### #0340 — Memo: Zero-Based Budgeting Pilot

Write the memo proposing a zero-based budgeting (ZBB) pilot for 3 departments. Traditional budgeting starts with last year's budget and adds/subtracts. ZBB starts from zero — every expense must be justified. Benefits: reveals hidden inefficiencies, forces prioritization. Risks: time-intensive, can demoralize managers. Propose a ZBB pilot for Finance, Marketing, and IT (not Engineering — ZBB doesn't work well for development teams). Include the ZBB process, the timeline, and the criteria for deciding to roll ZBB out company-wide.

### #0341 — Memo: Board Presentation on AI Strategy

Write the prep memo for the CEO preparing to present the company's AI strategy to the board for the first time. The memo should: define what the board needs to understand (AI is a strategic priority, not a feature), prepare the CEO for the 5 questions the board will definitely ask (ROI? competitive differentiation? risk? data strategy? talent?), recommend the narrative arc for the presentation (problem → opportunity → strategy → execution → metrics), and define what the CEO wants the board to approve or endorse at the end of the presentation.

### #0342 — Memo: Acquisition Integration Decision

Write the decision memo on whether to fully integrate an acquired company or keep it operating independently. The acquired company (\$15M ARR) has a distinct brand, customer base, and culture. Arguments for integration: cost synergies (\$3M/year), cross-sell opportunity, simplified operations. Arguments for independence: acquired company has a different go-to-market motion, integration risk is high (past acquisition integrations have taken 2 years and destroyed 30% of acquired ARR), and the founding team has retention packages tied to independence. Recommend with conditions.

### #0343 — Memo: Capital Allocation Framework

Write the capital allocation framework for a company with \$50M in cash and 3 investment opportunities: (1) organic growth (hire 40 salespeople, projected 30% ARR growth), (2) product R&D; investment (build AI features to defend competitive position, \$15M, no near-term revenue), (3) share buyback (\$20M — signals confidence but no growth value). The framework should establish the priority hierarchy, the minimum cash reserve, the required return threshold for each investment type, and the decision-making process.

### #0344 — Memo: Content Strategy Redesign

Write the strategic memo for redesigning the company's content marketing strategy. Current state: the content team produces 20 blog posts/month that generate 50,000 page views but convert at 0.2% to marketing-qualified leads. New strategy: reduce volume to 5 high-quality thought leadership pieces per month, invest in original research reports, and build a media presence through executive podcasts and speaking. Model the expected impact on MQL volume, CAC, and brand awareness. This is a 'quality over quantity' bet.

### #0345 — Memo: Operational Resilience Program

Write the operational resilience program memo. The board requires the company to document and test its resilience to 5 disruption scenarios: key person loss (CEO, CTO), cyberattack (48-hour outage), major vendor failure (primary cloud provider), supply chain disruption (for hardware components), and pandemic resurgence (return to full remote). For each scenario, write the business impact assessment, the current resilience level, the improvement required, and the testing protocol. The board will review this program annually.

### #0346 — Memo: Marketing and Sales Alignment

Write the strategic memo proposing a revenue alignment initiative between marketing and sales. Symptoms of misalignment: marketing generates 500 MQLs per month, sales converts only 8% (below 15% benchmark), and the two teams disagree on what a 'qualified lead' is. The proposal: create a shared revenue model (marketing is measured on pipeline generated, not MQLs), define a joint SLA (marketing commits to \$X pipeline per month, sales commits to following up 100% of MQLs within 24 hours), and establish a weekly revenue ops meeting with both teams present.

### #0347 — Memo: Knowledge Management System

Write the memo proposing an investment in a knowledge management system. Current state: critical company knowledge lives in individual employees' heads, email threads, Slack conversations, and inconsistent Notion pages. When employees leave, knowledge walks out with them (the company lost 2 senior engineers last quarter and 6 months of undocumented technical decisions went with them). Proposed investment: \$200K to implement a knowledge management system plus \$100K/year ongoing. Write the ROI case and the implementation plan.

### #0348 — Memo: Product Roadmap Communication

Write the strategic memo on how to communicate the product roadmap to different audiences: customers (what's coming, but not so specific that it kills current sales), investors (strategic direction, not release dates), the sales team (enough to sell to, but not so detailed that they over-promise), and internal product teams (detailed enough to build against). Each audience has different needs and different risks from oversharing. Write the communication policy for each audience and the governance process for what gets shared where.

### #0349 — Memo: AI Safety Incident Response

Write the memo establishing the AI safety incident response plan. An AI safety incident is: an AI system producing outputs that cause harm, violate policy, or create material legal, reputational, or financial risk. The plan covers: detection (how incidents are identified), classification (P1 through P4 severity), response (system shutdown vs. monitoring, customer notification, regulatory notification), investigation (root cause, responsible parties, fix), and remediation (system update, retraining, policy change). Write the incident severity matrix and the response protocol for P1 incidents.

### #0350 — Memo: Market Research Investment

Write the business case for a \$500K investment in market research. The company is making major product and GTM decisions without reliable market data. The investment covers: a quantitative survey of 500 target buyers (\$80K), quarterly competitive intelligence (\$120K), win/loss interview program (\$60K), and ongoing market sizing work (\$120K/year). ROI: better product decisions (fewer misses), better positioning (higher win rates). Write the memo with the expected decision quality improvement and the financial impact estimate.

### #0351 — Memo: Data Center vs. Cloud

Write the decision memo for whether to build an owned data center or continue cloud hosting. The company spends \$4M/year on AWS. At current growth, that will be \$12M/year in 3 years. A owned data center would cost \$15M upfront and \$3M/year to operate. The 5-year NPV analysis favors the owned data center by \$8M — but the flexibility loss is significant. Write the full analysis, including the non-financial factors (engineering talent for data center management, flexibility to scale down if growth slows).

### #0352 — Memo: Sales Territory Redesign

Write the sales territory redesign memo for a go-to-market restructure. The company is reorganizing from geographic territories to vertical industry territories. Rationale: enterprise buyers want to work with vendors who understand their industry, not just their geography. The redesign should: define the new verticals (financial services, healthcare, manufacturing, technology, public sector), assign current AEs to verticals (based on industry experience), redesign the quota by vertical (TAM differs by vertical), and manage the territory transition (existing accounts may change AEs — what is the transition plan for customers?).

### #0353 — Memo: API Ecosystem Strategy

Write the strategic memo establishing the company's API ecosystem strategy. The company has a core product used by 5,000 businesses. The API strategy: open the product's data and functionality via an API to allow third-party developers to build integrations and add-on products. The memo should evaluate: the business model (freemium API access vs. paid API tiers), the go-to-market approach (developer community investment), the investment required (developer documentation, API infrastructure, developer support), and the strategic risk (allowing third parties to build on your platform creates dependence — and also creates competitive intelligence for your competitors).

### #0354 — Memo: HR Policy Overhaul

Write the strategic memo recommending a comprehensive HR policy overhaul. The company's policies were written when the company was 20 people and were never updated as it grew to 400. Specific policies that are outdated or missing: remote work policy, AI usage policy, harassment and discrimination policy (the current policy predates #MeToo and lacks adequate reporting channels), sabbatical policy, and parental leave (the current policy offers 12 weeks, below the competitive benchmark of 16-20 weeks). Write the policy update priorities and the process for updating policies.

### #0355 — Memo: Internal Audit Program

Write the memo proposing an internal audit program. The company (\$150M ARR) has grown beyond the point where informal financial controls are adequate. The proposal: hire an internal audit director, define the annual audit plan (financial controls, IT security, vendor compliance, expense management), establish the reporting relationship (internal audit reports to the audit committee, not the CFO), and set the first year's audit scope. The memo should address: the cost (\$400K for the first year), the benefit (risk reduction and potential cost recovery from audit findings), and the timeline to first audit completion.

### #0356 — Memo: Innovation Lab Budget

Write the business case for a \$3M innovation lab budget. The innovation lab's mission: explore AI, automation, and emerging technology use cases that are 2-3 years from commercial application. The budget covers: 5 engineers and data scientists dedicated to innovation (\$1.8M), compute and cloud infrastructure (\$500K), external partnerships with universities and research labs (\$300K), and a market scanning and competitive intelligence function (\$400K). The ROI case: the lab will identify 3 commercial opportunities per year, of which 1 will be worth \$10M+ ARR within 3 years.

### #0357 — Memo: Customer Journey Redesign

Write the strategic memo proposing a customer journey redesign. The current customer journey was designed 5 years ago when the product was simpler. The redesign should: map the current journey and identify the top 3 friction points (from customer feedback and churn analysis), redesign the onboarding process for the AI era (AI-assisted onboarding reduces time-to-value from 90 to 30 days), redesign the renewal process (current renewal is entirely reactive; the redesign introduces a proactive 6-month health check), and define the investment required (\$1.5M in product, tooling, and CS resources). Write the business case.

### #0358 — Memo: New Product Line Investment

Write the investment memo for a new product line. The company's core product (\$80M ARR) serves CFOs. The new product targets COOs (\$20M TAM in year 3). The investment: \$8M over 2 years (5 engineers, 1 product manager, 2 sales specialists, and go-to-market support). The memo should: validate the market opportunity (primary and secondary research), describe the product concept and differentiation, model the financial projections (year 1-3), identify the risks (does the company have the go-to-market competency for COO buyers?), and request board approval.

### #0359 — Memo: Board Education on AI

Write the memo proposing an AI education program for the board. The company is making significant AI investments, and the board's ability to provide oversight depends on their understanding of AI. The program: 4 hours of AI education (2 sessions of 2 hours each), covering AI capabilities and limitations, the company's AI strategy, AI risk and governance, and competitive AI landscape. Facilitated by the CAIO and an external AI expert. The memo should make the case for why board AI literacy is a governance requirement, not a nice-to-have, and propose the program format and timeline.

### #0360 — Memo: Diversity and Inclusion Investment

Write the strategic memo proposing a \$2M diversity and inclusion investment. Current representation data: 35% women in leadership (below the industry benchmark of 42%), 12% Black or Hispanic employees (below the industry benchmark of 20%). The investment covers: diverse candidate pipeline programs (\$400K), manager training on inclusive hiring and leadership (\$300K), ERG support (\$200K), mentoring and sponsorship programs for underrepresented employees (\$300K), compensation equity audit and remediation (\$500K), and supplier diversity program (\$300K). Write the investment case, the target metrics, and the accountability framework.

### #0361 — Memo: Content Moderation Policy

Write the content moderation policy memo for a SaaS platform where user-generated content is a core feature. The policy must balance: free expression (users should be able to share authentic professional content), safety (the platform must not host harmful content), and legal compliance (GDPR, DMCA, and emerging AI content laws). The policy should: define prohibited content (harassment, illegal content, misinformation, AI-generated impersonation), the moderation process (AI first, human review for appeals), the appeals process, and the reporting mechanism for users. Reference the EU Digital Services Act compliance requirements.

### #0362 — Memo: Merger Rationale

Write the merger rationale memo for a merger of two peer companies (not acquisition — both companies contribute equally). The merger would create a \$200M ARR entity with complementary customer bases (Company A: manufacturing vertical; Company B: retail vertical). The memo should: quantify the revenue synergies (cross-sell opportunity), cost synergies (technology infrastructure consolidation, G&A; reduction), competitive positioning benefits (combined entity has a stronger product than either alone), the governance implications (how are the two boards and management teams combined?), and the risks (culture integration, customer confusion, talent retention).

### #0363 — Memo: Digital Transformation Strategy

Write the digital transformation strategy memo for a traditional business (manufacturing company, \$500M revenue, currently 20% digital). The digital transformation should: improve customer experience (digital ordering, digital service, real-time visibility), improve operational efficiency (IoT sensors on production equipment, AI-powered quality control, predictive maintenance), create new revenue streams (data-as-a-service from production data), and build the digital talent and culture required for transformation. The memo should be honest about the 3-5 year timeline and the significant organizational change management required.

### #0364 — Memo: IP Protection Strategy

Write the intellectual property protection strategy memo for a technology company. The company's IP includes: software code, proprietary algorithms, training data for AI models, and brand assets. The strategy should cover: patent strategy (what is worth patenting? patents in AI are complex and expensive), trade secret protection (how is source code and algorithm knowledge protected?), copyright management (terms of service and acceptable use policy), open source compliance (the company uses open source software — what are the license obligations?), and enforcement strategy (what level of IP infringement triggers legal action?).

### #0365 — Memo: Supply Chain Risk Mitigation

Write the supply chain risk mitigation memo for a hardware company with significant supply chain exposure. The risk assessment identified 3 high-risk areas: single-source components (2 components are only available from one supplier), geographic concentration (60% of manufacturing in one country with increasing geopolitical risk), and long lead times (average 14 weeks — creates inventory management challenges). The mitigation plan: qualify alternative suppliers for single-source components (12-month process), develop a manufacturing footprint in a second geography, and build a strategic inventory buffer. Write the investment required and the risk reduction timeline.

### #0366 — Memo: Go-to-Market for New Vertical

Write the go-to-market memo for entering the healthcare vertical. The company's product serves financial services and technology companies. Healthcare is a new vertical with significant opportunity (\$30M TAM) but different buyer personas, different procurement processes (longer cycles, compliance requirements), and different competitive dynamics. The GTM memo should: define the buyer persona (Chief Medical Information Officer or VP Revenue Cycle), the required product modifications for healthcare (HIPAA compliance, healthcare-specific workflows), the sales approach (health system relationships take 12-18 months to develop), and the first year investment required.

### #0367 — Memo: Remote Access Security

Write the strategic memo on remote access security following a security audit. The audit found 3 high-risk findings: (1) 40% of employees use personal devices for work without MDM management, (2) VPN access is not enforced for access to sensitive systems, (3) multi-factor authentication is not required for all SaaS tools. The remediation plan: implement MDM for all devices accessing company resources (6-week timeline), enforce VPN for sensitive system access (3-week timeline), and mandate MFA for all tools with access to customer data (4-week timeline). Write the investment, the impact on employee workflow, and the communication plan.

### #0368 — Memo: Business Continuity Investment

Write the business continuity investment memo. The company's current business continuity plan is inadequate: no recovery time objective defined, backup systems not tested in 18 months, and the plan does not cover AI system failures. The investment: \$600K to upgrade the BCP to include: RPO and RTO definitions for all critical systems, quarterly backup testing, disaster recovery rehearsal for the top 3 failure scenarios, and an AI system failure recovery plan. Write the investment case, the risk reduction benefit, and the compliance requirement (enterprise customers are asking for business continuity certification as a condition of renewal).

### #0369 — Memo: Pricing Audit Results

Write the pricing audit results memo for the CFO and CEO. The pricing audit reviewed 250 deals closed in the past 12 months. Findings: average discount rate was 22% (target <15%), 12% of deals had discounts above 35% with no documented justification, 3 deals had the same customer paying different prices for the same product (legal risk), and the company left an estimated \$3.2M in revenue on the table by discounting below the customer's willingness-to-pay. The remediation plan: implement approval thresholds for discounts above 20%, create a discount justification form, and audit price consistency across the customer base.

### #0370 — Memo: Automation Investment Case

Write the investment case for automating 3 manual processes that are creating operational risk. Process 1: manual data entry between two systems (2 FTEs, 40 hours/week — risk: data entry errors affecting customer records). Process 2: manual invoice generation (1.5 FTEs, 25 hours/week — risk: billing errors and revenue leakage). Process 3: manual compliance reporting (2 FTEs, 30 hours/week — risk: compliance deadline misses). Automation investment: \$400K, payback in 14 months through headcount reallocation and error reduction. Write the full investment case.

### #0371 — Memo: CRM Implementation

Write the business case for implementing a new CRM to replace disconnected spreadsheets and a poorly adopted legacy system. The current state: sales team uses 4 different tools to track leads, deals, and customer interactions, resulting in duplicate data, missed follow-ups, and no reliable pipeline forecast. The new CRM investment: \$300K/year for Salesforce (or HubSpot for a lighter option), \$200K implementation, and \$100K training. Benefits: pipeline visibility (CEO can forecast accurately), reduced sales cycle (AI-assisted follow-up reduces deals going cold), and cross-functional alignment (CS, sales, and marketing share customer data).

### #0372 — Memo: Quarterly Business Review Format

Write the memo proposing a redesigned quarterly business review (QBR) format for the executive team. The current QBR takes 2 days and leaves the team exhausted. The redesigned format: 1 day maximum, pre-reads circulated 3 days in advance (no 'briefing' time in the meeting), 3 sections: performance review (morning, 3 hours — data-driven, discussion of variances only), strategic updates (afternoon, 2 hours — each function presents their most important strategic insight), decisions (late afternoon, 1 hour — the specific decisions the executive team needs to make before the next QBR). Write the agenda, the pre-read requirements, and the facilitation guide.

### #0373 — Memo: AI Talent Strategy

Write the AI talent strategy memo. The company needs 30 AI-skilled employees over the next 18 months: 15 ML engineers, 8 AI product managers, 4 responsible AI specialists, and 3 AI strategy leaders. The current talent market: ML engineers are scarce and expensive (\$250K+ total compensation), AI PMs are scarce (few people understand both AI and product management deeply), and the company is not well-known in the AI talent community. The strategy: partner with 3 universities for research and early talent, build an AI internship program, offer equity compensation that is competitive with FAANG, invest in employer branding in the AI community (engineering blog, conference presence), and develop 10 ML engineers internally from the existing engineering team.

### #0374 — Memo: Environmental Target Setting

Write the memo proposing company environmental targets. The company has received board requests from 2 institutional investors to set public emissions reduction targets. Current emissions: Scope 1 (owned vehicles, on-site gas): 50 tonnes CO<sub>2</sub>e/year; Scope 2 (purchased electricity): 500 tonnes CO<sub>2</sub>e/year; Scope 3 (business travel, supply chain, remote employee energy): 2,500 tonnes CO<sub>2</sub>e/year. Proposed targets: Net zero Scope 1+2 by 2028, 50% reduction in Scope 3 by 2030 (science-based target aligned). Write the target rationale, the investment required, and the verification approach.

### #0375 — Memo: Customer Tier Restructuring

Write the memo proposing a customer tier restructuring. The company currently treats all customers the same (same SLA, same onboarding, same CSM access) regardless of contract size. This is unsustainable as the customer base grows from 200 to 800. Proposed tiers: Enterprise (\$150K+ ACV, <10% of customers, >60% of ARR — dedicated CSM, 99.9% SLA, 4-hour support response), Mid-Market (\$30K-\$150K ACV, 30% of customers, 30% of ARR — shared CSM, 99.5% SLA, 8-hour response), and SMB (<\$30K ACV, 60% of customers, 10% of ARR — digital-led, 99% SLA, 24-hour response). Write the transition plan and the customer communication strategy.

### #0376 — Memo: Sales Cycle Reduction

Write the memo proposing initiatives to reduce the average sales cycle from 90 days to 60 days for mid-market accounts. Root cause analysis identified 3 bottlenecks: (1) legal review takes an average of 21 days (legal team is understaffed), (2) security review required by customers takes 15 days (no standardized security questionnaire response), (3) economic buyer approval takes 18 days (sales team is not involving the economic buyer early enough). Proposed solutions: hire a contracts attorney (\$150K), create a standardized security response package, and train AEs on multi-threaded selling. Model the revenue impact of 30-day cycle reduction.

### #0377 — Memo: AI Competitive Moat

Write the strategy memo defining the company's AI competitive moat. A competitive moat in AI is not just having AI features — every competitor will have AI features. The durable moat comes from: proprietary data advantage (data competitors cannot get), AI talent density (the quality of AI researchers and engineers is differentiated), AI infrastructure investment (purpose-built compute at a scale competitors cannot replicate), AI culture (the organization's ability to experiment and learn faster), and regulatory positioning (being ahead of compliance requirements). Write the moat assessment and the investment plan to deepen it.

### #0378 — Memo: Organizational Design for Scale

Write the organizational design memo for scaling from 300 to 600 employees. The company's current flat structure (everyone reports to the CEO or a direct report of the CEO) is becoming a bottleneck. The memo should: assess the current structure's breaking points, propose a new organizational design (functional, divisional, or matrix), define the new management layers (adding a President or COO? regional structures?), calculate the management span of control at each level, address the transition plan (who is promoted? who is repositioned?), and identify the culture risk (growth often dilutes culture — how do we preserve it?).

### #0379 — Memo: Customer Advisory Structure

Write the strategic memo proposing a formalized customer advisory structure at 3 levels: Customer Advisory Board (strategic accounts only, annual meeting, product roadmap input), Partner Advisory Council (channel partners, quarterly, go-to-market input), and Developer Advisory Group (API developers, monthly, API and documentation input). Each structure requires investment. Write the case for each, the investment required, and the expected business benefit.

### #0380 — Memo: Platform vs. Product Strategy

Write the strategic memo evaluating whether the company should become a platform (allowing third parties to build on top of it) versus remaining a product (controlling the full user experience). Platform advantages: ecosystem lock-in, revenue share from third-party apps, accelerated innovation. Platform risks: platform companies are harder to build, require API investments and developer relations, and give competitors visibility into platform capabilities. Write the evaluation framework and recommend the right strategy for the company's current stage.

### #0381 — Memo: AI Cost Structure

Write the strategic memo analyzing the AI cost structure as AI adoption grows. As AI features are adopted by all customers, the company's COGS (cost of goods sold) will increase because AI inference has a direct per-query cost. At \$0.005 per AI query  $\times$  50 queries/user/day  $\times$  100,000 users = \$250,000/day = \$91M/year. The memo must address: is this cost built into the current pricing model? How does AI COGS affect gross margin? What optimization investments (prompt optimization, model fine-tuning, caching) can reduce per-query cost? What is the pricing adjustment required?

### #0382 — Memo: Partnership with University

Write the strategic memo proposing a research partnership with a leading university's AI lab. The partnership should provide: early access to research breakthroughs, access to PhD students as interns and hires, co-authorship of papers that build the company's AI brand, and use of the university's research infrastructure. Investment: \$500K/year for 3 years. Expected ROI: 2-3 research breakthroughs that translate into product features, 15+ research hires, and enhanced employer brand in the AI talent market.

### #0383 — Memo: AI-Assisted Sales

Write the strategic memo proposing an AI-assisted sales program. The program would give AEs an AI tool that: researches each prospect before the first meeting (news, funding, tech stack, hiring patterns), suggests the right talk track based on the prospect's industry and pain points, drafts follow-up emails after each meeting, and alerts the AE when a prospect's behavior signals buying intent (visits pricing page, downloads a case study). Investment: \$300K/year in AI tools + \$200K in training. Expected outcome: 15% improvement in win rate.

## SECTION 04

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125 unique prompts for senior executives

### #0384 — Executive Hiring Brief — CREATE Format

Context: You are the CHRO at a \$150M ARR B2B SaaS company. The CEO has decided to hire a Chief Revenue Officer for the first time. Previously, the VP of Sales and VP of Marketing reported directly to the CEO. The new CRO will own the full revenue function: sales, marketing, customer success, and revenue operations. You are commissioning a search firm. Request: Write the executive search brief — the document sent to headhunters to guide the search. Cover: why this role is being created, the reporting structure and scope, the success profile (what the person must have done before), the compensation range, the culture requirements, the process (timeline, key stakeholders in final interviews, decision criteria), and the 3 non-negotiables that would disqualify a candidate regardless of pedigree. Adjustments: Include a section on what the incoming CRO will find when they arrive — the honest state of the revenue organization. Surprises after hire are the leading cause of CRO turnover within 18 months. Tone: Direct and complete. Executive search firms need specificity, not aspirational descriptions.

### #0385 — Structured Interview Guide — CREATE Format

Context: You are hiring a Head of AI Ethics & Governance for a financial services firm. The company deploys AI in credit scoring, fraud detection, and customer service. The role requires: deep expertise in AI bias, experience with EU AI Act compliance, ability to influence technical and non-technical stakeholders, and comfort operating in a regulated environment. Request: Create a structured interview guide for 4 interviewers (CAIO, General Counsel, CTO, and an independent board member). The guide should have 5 questions per interviewer, each with the competency being assessed, the ideal answer indicators, and follow-up probes if the candidate gives a shallow answer. Adjustments: Include at least one scenario question per interviewer that puts the candidate in a situation they would actually face in the role. Include a scoring rubric (1-5) for each question. Examples: A strong scenario question for the GC: 'We've just received a media enquiry about our AI-powered credit decision system. A journalist has data suggesting our model denies credit to women at higher rates than men. You have 4 hours before the story publishes. Walk me through your response.' A weak question: 'Tell me about your experience with AI ethics.'

### #0386 — Performance Improvement Plan — CREATE Format

Context: You are the VP of Engineering and you need to put a senior software engineer on a Performance Improvement Plan. The engineer has been with the company 3 years and was previously a strong performer. In the last 6 months: 3 of their 5 deliverables were late (by 2-3 weeks each), their code review participation dropped from 15 reviews/month to 2, and two team members have flagged that the engineer is disengaged in team discussions. Request: Write the PIP document. The plan runs for 60 days. Cover: the specific performance gaps with documented examples, the expectations for the 60-day period (measurable and specific), the support the company will provide (coaching sessions, reduced scope, mentoring), the review milestones at day 30 and day 60, and the outcome if the plan is not met. Adjustments: The tone must be professional and supportive, not punitive. PIPs that feel like termination paperwork backfire — they should be genuine improvement opportunities. Include a conversation guide for the manager: how to open the PIP conversation and how to address likely emotional responses. Tone: Empathetic but clear. The engineer needs to understand both the seriousness of the situation and the genuine support available.

### #0387 — Succession Planning for VP Sales — One-Shot

Your current VP of Sales has been identified as a flight risk — headhunters are calling, and they are starting to disengage from the long-term planning discussions. You need a succession plan immediately. Write the succession planning document for the VP of Sales role. Use this succession planning framework: 'Role: [Title] Current incumbent: [Name and tenure] Risk assessment: Flight risk / Retirement risk / Performance risk (circle) Time horizon: [How long until succession needed] Internal candidates: [Name, readiness level (Ready Now / Ready in 12M / Development candidate), gaps] External search: [Would be triggered by what event, timeline to hire] Interim coverage: [Who could cover temporarily, for how long] Retention actions: [What to do now to reduce the risk] Knowledge transfer: [What must be documented before incumbent leaves]' Apply this framework to the VP of Sales at a \$80M ARR SaaS company, being specific and honest about the internal bench strength (usually thin at this stage of company).

### #0388 — Talent Review Calibration Process — One-Shot

Design the annual talent review and calibration process for a company of 500 employees. The process must: evaluate all employees against a performance/potential matrix, identify the top 15% (High Potential), address the bottom 10% (Performance Action), and produce succession plans for critical roles. Example talent review template for a calibration session: '[Employee Name] — Current role: Sr. Product Manager, Tenure: 2.5 years Performance (last 12 months): Exceeded expectations — shipped 3 major features, NPS contribution +12 points Potential assessment: High — demonstrates strategic thinking, builds followership, handles ambiguity well Category: HiPo — development plan: sponsor for VP Product succession, external leadership program Succession readiness for VP Product: Ready in 12-18 months Retention risk: Medium (received recruiter interest, recent equity cliff)' Write the full calibration session design: preparation (what data is pre-populated), session format (who attends, how long, how to calibrate across managers), output templates, and post-session actions.

### #0389 — Job Description for AI Product Manager — Few-Shot

Write a compelling, honest job description for a senior AI Product Manager role. The role is at a Series B AI company (\$40M raised, 120 employees). Examples of JD elements that attract strong candidates vs. weak ones: Weak: 'We are looking for a strategic thinker who is passionate about AI and can work cross-functionally to deliver impact.' Strong: 'You will own the product roadmap for our AI Assistant — the feature that 40% of our customers use daily. You'll partner with a team of 4 ML engineers, run weekly evals to measure model quality, and present product performance to our CEO monthly.' Weak: 'Competitive compensation and benefits.' Strong: 'Salary range: \$185K–\$230K base. 0.15%–0.25% equity (4-year vest, 1-year cliff). Full health/dental/vision. \$3,000 annual learning budget. Async-first culture — we trust you to manage your time.' Weak: 'Requirements: 5+ years PM experience, knowledge of AI/ML.' Strong: 'You've worked on an AI or ML-powered product in production (not just a side project). You've written evals. You've had to explain to an executive why a model is producing bad outputs. You've made a build vs. fine-tune vs. API decision before.' Write the complete JD.

### #0390 — Compensation Benchmarking Guide — Few-Shot

You need to benchmark compensation for your AI engineering team against the current market. The team has 15 people: 3 Staff Engineers, 7 Senior Engineers, 5 ML Engineers (specialized). Examples of how to structure compensation benchmarking: Level 1 — Data sources: 'We benchmark against three data sources: Levels.fyi (public market data, tech-company heavy), Radford McLagan survey (our HR platform's survey data, broader industry), and our own offer decline data (what candidates rejected our offers to take — the most reliable real-world signal).' Level 2 — Percentile positioning: 'Our policy is to pay at the 75th percentile for critical roles (ML Engineers, Staff Engineers) and 50th percentile for supporting roles. This is calibrated annually and approved by the Compensation Committee.' Level 3 — Geographic adjustment: 'All roles are benchmarked to San Francisco Bay Area and then adjusted by location factor: NYC 95%, Austin 85%, London 80%, Toronto 75%, remote US 80%.' Write the full compensation benchmarking report for the team described above, using current 2025 AI engineering compensation benchmarks.

### #0391 — Exit Interview Insights Report — Chain-of-Thought

I have exit interview data from the last 12 months. 45 employees left, and I need to turn their exit interview responses into actionable insights for the CEO. Walk me through how to analyze this data properly. Think through this step by step: 1. What are the most important questions to ask of the exit interview data? (What patterns should I look for before I start analyzing?) 2. How do I segment the data to make it meaningful? (By department? By tenure? By performance level? By gender or other demographics?) 3. What is the difference between stated reasons for leaving and real reasons? How do I get closer to the real reasons from survey data? 4. How do I identify systemic issues vs. isolated manager issues? 5. What format should the CEO report take? What level of detail is appropriate? 6. What recommendations should I make? What is the evidence threshold for recommending a change based on exit data? Work through each step, then produce a draft CEO report based on the most common patterns in exit data (manager quality, compensation, career growth, culture).

### #0392 — Hiring Plan for AI Team — Role-Based

Act as a VP of Talent Acquisition at a tech company that is building its AI team from scratch. The CTO needs to hire 20 AI/ML engineers in 6 months. The company is not a well-known brand (it's a \$50M revenue industrial automation company), it cannot match FAANG compensation on base salary, and it is competing against every tech company for the same talent pool. Give me: 1. A realistic assessment of what we can and cannot attract given our position 2. The talent sourcing strategy: where to find AI engineers who are not on the open market 3. The employer brand positioning: what story about working here resonates with AI talent 4. The offer structure: how to be competitive without matching Google on base salary (equity, mission, scope) 5. The hiring process design: speed matters — how do we avoid losing candidates to faster-moving companies? 6. The 6-month hiring plan with milestones, risks, and contingencies

### #0393 — Underperforming Manager Coaching Conversation

Write the script for a Director-level conversation with a manager who is underperforming. The manager's team has high attrition (4 people left in 9 months), low engagement scores (2.8/5), and is consistently missing sprint deliverables. The manager is technically excellent but lacks people leadership skills. The conversation goal is to: share specific feedback with data, set clear expectations, offer support (coaching, training), and create a 90-day plan. Include the opening, the key messages, the likely defensiveresponses and how to handle them, and how to close the conversation with commitment.

### #0394 — Onboarding Plan for VP-Level Hire

Design a 90-day onboarding plan for a new VP of Customer Success. Day 1-30: priorities (meet every team member, shadow 10 customer calls, review all customer health scores, read the last 3 QBR decks, understand churn history). Day 31-60: priorities (identify top 3 CS process gaps, meet top 10 customers personally, shadow 3 renewal conversations, present findings to CEO). Day 61-90: priorities (design CS organization improvements, own first renewal independently, present 6-month CS strategy to leadership team). Include week-by-week schedule for month 1.

### #0395 — Interview Debrief Facilitation Guide

Write the facilitation guide for a post-interview debrief session. The session is for 5 interviewers evaluating a VP of Product candidate. The guide should: prevent anchoring bias (the most senior person speaks last), structure the discussion by competency not by overall impression, define what 'strong hire' vs. 'weak hire' evidence looks like vs. gut feel, include a clear decision-making process (unanimous required vs. majority), and handle the situation where 4 interviewers want to hire and 1 has a hard no.

### #0396 — AI Team Organizational Design

Design the organizational structure for a 30-person AI team being built from scratch at a financial services company. The team's mandate: build and operate AI systems for credit, fraud, and customer service. Design: the team structure (ML research, ML engineering, AI products, AI ops, responsible AI), the reporting lines, the interfaces with business units, the ratio of internal vs. external contractors, the senior hire sequencing (who do you hire first?), and the metrics by which the team's performance will be evaluated by the CFO in year 1.

### #0397 — Diversity Hiring Initiative Design

Design a diversity hiring initiative for an engineering team that is 85% male and lacks ethnic diversity. The initiative should: identify the specific barriers in the current hiring process that are limiting diversity (not assume they know), redesign the job description language, expand sourcing channels to HBCUs and coding bootcamps, implement blind resume screening, require diverse interview panels, and set specific metrics for improvement. Include: a 6-month implementation timeline, the business case for diversity (not just the ethical case), and how to handle internal resistance to the initiative.

#### #0398 — Global Talent Mobility Policy

Write a global talent mobility policy for a company with 800 employees across 15 countries. The policy should cover: the company's philosophy on international mobility (when the company will sponsor relocations vs. not), the types of international assignments (permanent transfer, short-term project, commuter arrangement), the compensation framework for international moves (home-country vs. host-country approach), immigration support, tax equalization, and repatriation rights. Include a decision matrix for managers requesting international transfers.

#### #0399 — 360-Degree Feedback Process Design

Design the 360-degree feedback process for senior leaders (Director and above). Cover: who provides feedback (direct reports, peers, stakeholders, skip-level), how the survey is structured (behavioral competencies, 5-point scale, open-ended questions), how anonymity is protected, how results are presented to the leader, who facilitates the debrief conversation, how 360 results are used in performance reviews (they should be development-focused, not purely evaluative), and what follow-up is expected after the 360 debrief.

#### #0400 — Hiring Freeze Communication Plan

Write the communication plan for managing a hiring freeze. The company has just announced it is pausing all non-critical hiring for 90 days due to macroeconomic uncertainty. The communication plan should cover: how to tell candidates in the pipeline (at various stages), how to tell hiring managers who will lose approved headcount, how to motivate the recruiting team who are now managing disappointment rather than hiring, what to communicate to all staff, and the criteria for 'critical hire' exemptions from the freeze.

#### #0401 — Reference Check Framework

Design a structured reference check framework for senior hires. The framework should: define who to reference (at least one direct report, one peer, one manager — not just the candidates' chosen references), provide the question list (covering: decision-making style, handling conflict, building teams, dealing with failure, the one thing they would do differently in the hire, and the open-ended 'what else should I know'), define what to do with inconsistent references, and specify the red flags that should stop an offer regardless of how well interviews went.

#### #0402 — Internal Mobility Program Design

Design an internal mobility program for a 1,000-person company where 60% of open roles are currently filled with external hires. The program should: create visibility into open roles before external posting (internal-first posting window), build career path documentation for all role families, train managers to support team member development without blocking internal moves, establish a 'mobility without manager permission' policy for moves that benefit the company, and measure success by internal fill rate and internal move NPS. Include a 12-month rollout plan.

#### #0403 — Compensation Philosophy Statement

Write the company compensation philosophy statement. The statement should cover: the company's market positioning (which percentile it targets and why), the compensation components (base, bonus, equity, benefits) and the philosophy on each, how pay equity is maintained (regular audits, transparent bands), the relationship between performance and pay, how the philosophy applies to different employee levels, and how the company communicates compensation decisions to employees. This will be published internally and referenced in all offer conversations.

#### #0404 — Manager Effectiveness Survey Design

Design a quarterly manager effectiveness survey for all individual contributors. The survey should have 10 questions covering: how clearly the manager communicates expectations, whether the manager gives useful feedback, whether the manager removes blockers, whether 1:1s are valuable, whether the manager advocates for the team, and how supported the team feels. Include a 5-point scale, a Net Promoter Score for managers (would you want this manager again?), and a method for surfacing the lowest-scoring managers for HR follow-up.

#### #0405 — Employee Value Proposition for AI Talent

Write the employee value proposition (EVP) for attracting AI/ML talent to a non-tech company (a \$2B retail company building its first AI team). The EVP must be honest about what the company can and cannot offer compared to FAANG: lower base salary but real ownership and impact, the chance to build something foundational vs. being one of thousands, interesting proprietary data sets, no 'politics of scale', direct access to senior leadership. Write the EVP statement (150 words) and 5 supporting proof points, each with a specific, concrete example.

#### #0406 — Restructuring Communication Plan

Write the communication plan for a company restructuring that will eliminate 120 roles (8% of workforce) due to AI automation of certain processes. The communication plan must: cover the all-hands message (honest about why, not purely financial), the individual notifications (done with dignity and in person where possible), the support package (severance, outplacement, reference letters), the message to the remaining 92% of staff (their concerns are legitimate), the external message (for media and customers), and the 30-day check-in plan for managers to support retained employees' anxiety.

#### #0407 — Layoff Notification Script

Write the individual employee notification script for a manager delivering a layoff notice. The conversation should be 15 minutes, compassionate, and legally compliant. Cover: the opening statement (no small talk, but not brutal), the message about the position being eliminated (not about the employee's performance), the severance package details, next steps (equipment return, IT access, HR follow-up), and how to close the conversation with dignity. Include how to handle the most difficult reactions: anger, tears, and complete silence. Note: this is one of the most important conversations a manager will have — get it right.

#### #0408 — Internal Promotion Announcement

Write 3 different internal promotion announcement emails for different seniority levels and contexts: (1) An individual contributor promoted to their first manager role, (2) A VP promoted to SVP, (3) A lateral move that is framed as a growth opportunity rather than a promotion. Each email should: explain why the person was selected without being generic ('exceeded expectations'), convey genuine enthusiasm, and set expectations for their expanded role. CEO or CHRO voice. 150 words each.

#### #0409 — Candidate Rejection Letter Templates

Write 3 candidate rejection letter templates for different stages of the hiring process: (1) Resume screen rejection (kind, fast, no false hope), (2) First interview rejection (personalized, constructive without being specific enough to create legal risk), (3) Final round rejection (hardest to write — person invested significant time, came very close). Each letter should close the relationship with dignity and potentially leave the door open for future opportunities. The letters should feel human, not legal template.

#### #0410 — Manager Development Program Design

Design a 6-month manager development program for first-time managers (newly promoted from individual contributor). Module 1 (Month 1): Your new identity — the psychological shift from doing to enabling. Module 2 (Month 2): Feedback and difficult conversations. Module 3 (Month 3): Running effective 1:1s and team meetings. Module 4 (Month 4): Performance management — setting expectations, coaching, and PIPs. Module 5 (Month 5): Hiring and building your team. Module 6 (Month 6): Organizational savvy — influencing beyond your team. For each module: learning objectives, format (workshop, coaching, reading), and 1 practical assignment.

#### #0411 — Employee Relations Investigation Template

Write the template for conducting a workplace investigation into a harassment complaint. The template should cover: the investigation scope and mandate (who conducts, who is notified, confidentiality), the interview guide for the complainant (how to gather facts without leading), the interview guide for the respondent (presumption of innocence, right to respond), the interview guide for witnesses, the evidence documentation process, the findings report format, and the decision tree for outcomes (substantiated — what next, unsubstantiated — what next, inconclusive — what next). Include the legal review trigger checklist.

#### #0412 — HRBP Strategic Roadmap

Write the HR Business Partner strategic roadmap for partnering with the Sales organization (300 people). The roadmap should cover: the top 3 people priorities for Sales this year (based on attrition data, engagement scores, and business performance), the HRBP's planned interventions (quarterly talent review, manager coaching, compensation benchmarking, culture work), the metrics the HRBP will track and report to the Sales leader monthly, and the HRBP's operating rhythm (weekly Sales leadership team attendance, monthly all-hands, quarterly strategy alignment).

#### #0413 — Return to Office Policy

Write the return to office policy for a tech company that went fully remote in 2020 and is now implementing a 3 days per week in-office requirement. The policy should cover: the rationale (not just 'because leadership wants it' — explain what specific business outcomes the policy is designed to improve), what 3 days means in practice (flexibility within the week), the manager's role in implementation, the accommodation process (medical, caregiving, geographic), enforcement and consequences, and the metrics that will determine if the policy is achieving its intended outcomes. Address the elephant in the room: what happens if talent attrition increases.

#### #0414 — Talent Acquisition Metrics Scorecard

Design the monthly talent acquisition metrics scorecard. Metrics to track: time-to-fill by level and department, offer acceptance rate, quality of hire (90-day performance rating of new hires), source effectiveness (% of hires from each channel vs. cost per channel), diversity metrics (% of interviews and offers to underrepresented groups), cost per hire, recruiter efficiency (offers per recruiter per month), and candidate NPS (how did the hiring process feel?). For each metric, include the target, the benchmark comparison, and the traffic light threshold for escalation.

#### #0415 — Leadership Team Assessment Framework

Design the annual leadership team assessment framework. The assessment evaluates the team as a collective unit, not individual leaders. Assessment dimensions: clarity of purpose and direction (do they have a shared strategic agenda?), decision quality and speed (how are decisions made, how often are they revisited?), trust and conflict resolution (can they disagree productively?), cross-functional execution (do they coordinate effectively?), talent investment (are they developing successors?), and external stakeholder management (board, investors, customers). Include the assessment process (survey + facilitated discussion) and how results are used.

#### #0416 — New Hire Onboarding KPIs

Design the KPIs for measuring new hire onboarding effectiveness. Metrics by category: time-to-productivity (how long until a new hire is performing at expected level — measured by manager assessment at 30/60/90 days), 6-month retention rate (what % of new hires are still with the company 6 months after start), new hire NPS (how do new hires rate the onboarding experience?), manager satisfaction with onboarding (do managers feel new hires are well-prepared?), and culture integration score (qualitative survey at 90 days). For each KPI, define the measurement method, the target, and the intervention trigger.

#### #0417 — Compensation Band Review Process

Design the annual compensation band review process. The process should: gather market data from 3 sources (Radford, Levels.fyi, company's own offer/decline data), define the percentile target by role criticality (75th percentile for engineering and AI roles, 50th percentile for support roles), identify current employees paid below the updated bands, model the cost of bringing all employees to band minimum, get CFO and CEO approval for the adjustment budget, and communicate band changes to employees and managers. Include the manager communication guide — how to explain band adjustments without setting expectations that annual adjustments are automatic.

#### #0418 — Employee Engagement Action Planning

Write the guide for translating employee engagement survey results into department-level action plans. The guide should: prevent the common failure mode (survey results presented, no actions taken), define the right level of granularity for action planning (team level, not company level), give a framework for prioritizing which low-scoring items to act on first (impact + controllability), provide a template for a 90-day action plan with owner and measurement, and show how to communicate the action plan back to employees to close the feedback loop. Include 3 example action plan entries from common engagement survey low scores.

#### #0419 — Talent Pipeline Review Template

Write the quarterly talent pipeline review template for the CEO and board. The review should cover: the bench strength for the top 15 critical roles (who is the succession candidate? what is their readiness? what development is happening?), key person dependency risks (roles with no successor), flight risk assessment (who are we worried about losing?), diversity of the pipeline (is the succession pool as diverse as we want the future leadership to be?), and the top 3 talent actions management is taking this quarter. Format as a concise board document — not a spreadsheet dump.

#### #0420 — Culture Due Diligence Guide

Write the culture due diligence guide for evaluating a company's culture before an acquisition. The guide should: define what cultural due diligence covers (values alignment, leadership style, decision-making process, communication norms, talent philosophy), the data sources to review (Glassdoor, employee surveys if available, interview transcripts), the interviews to conduct (middle management, not just executives), the red flags that suggest culture incompatibility will destroy integration value, and how to use the culture assessment in post-merger integration planning.

#### #0421 — Non-Solicitation Agreement Guide

Write the manager's guide to non-solicitation agreements. When the company asks a departing employee to sign a non-solicitation agreement, managers often don't understand what it means or how to handle it. The guide should cover: what a non-solicitation agreement does and doesn't cover, how to respond if a former employee starts recruiting your team, what to do if a competitor appears to be systematically targeting your employees, and what the company's obligations are to the employee they're asking to sign. Note: employment law varies by jurisdiction — always involve Legal. Include the most common state-specific caveats.

#### #0422 — Global HR Compliance Checklist

Create the annual global HR compliance checklist for a company operating in 8 countries: US (Delaware), UK, Germany, France, Singapore, Japan, Brazil, Australia. For each country, list the top 5 compliance requirements that most commonly catch companies by surprise: employment contract requirements, mandatory benefits, works council or consultation requirements (EU countries), termination procedures and notice periods, data privacy requirements for employee data (GDPR in EU/UK), and annual compliance filings. Format as a country-by-country table with links to the relevant regulatory body for each requirement.

#### #0423 — Skills-Based Hiring Implementation

Write the implementation guide for transitioning from credential-based hiring (requiring degrees and specific prior company names) to skills-based hiring. The guide should: explain the business case for skills-based hiring (wider talent pool, better performance correlation, DEI benefits), identify which roles in the company can have degree requirements removed immediately, design the skills assessment process to replace credential screening, train hiring managers on how to evaluate skills without credentials, and measure whether skills-based hiring improves quality of hire, diversity, and time-to-fill. Include the policy change and the manager communication.

#### #0424 — Leadership Hiring Decision Framework

Write the decision framework for hiring a senior leader when the hiring panel is split. Two interviewers voted 'strong hire,' two voted 'no hire,' and the CEO is the tiebreaker. The framework should: distinguish between split decisions driven by different evidence vs. different risk tolerance vs. different criteria (these have different solutions), define the process for the tiebreaker conversation (what information is shared, how the decision is documented), establish the principle that 'disagree but commit' does not apply to hiring (a divided decision is a valid reason to continue searching), and identify when a split panel should restart the process rather than force a decision.

#### #0425 — AI in Hiring Policy

Write the policy on the use of AI in hiring decisions. The policy should cover: which AI tools are approved for use in hiring (and which are prohibited), what AI can and cannot be used for (screening resumes: OK with audit; making hiring decisions: not OK without human review), the bias testing requirements for any AI hiring tool, disclosure requirements to candidates (must they be told AI was used?), the override policy (any AI recommendation can be overridden by a human interviewer), and the annual audit requirements for AI tools in hiring. Reference EEOC guidance and EU AI Act requirements for high-risk AI systems.

#### #0426 — Organizational Network Analysis

Write the organizational network analysis report template for identifying informal influence, knowledge bottlenecks, and collaboration patterns in a 500-person company. The analysis uses survey data asking employees who they go to for information, decisions, and energy/motivation. The report should cover: the key connectors (informal influencers who bridge teams), the bottlenecks (overloaded nodes who are single points of failure), the isolated individuals (at attrition risk), and the cross-functional collaboration gaps (which teams rarely communicate). Include: how to conduct the survey, the analysis methodology, and how to use the findings without creating an atmosphere of surveillance.

#### #0427 — Remote Team Leadership Guide

Write the leadership guide for managing a high-performing fully remote team. The guide should cover: the communication infrastructure (async-first tools, documented decisions, written culture), the 1:1 cadence that builds trust across distance, how to manage performance without physical presence (outcomes over activity), how to build team culture virtually (not just virtual happy hours), how to identify early signs of disengagement in remote team members, and the onboarding process for new remote hires. Be specific and practical — not generic advice about 'communicating clearly' but specific templates, cadences, and tools.

#### #0428 — Hiring for Culture Add vs. Culture Fit

Write the guide for hiring for 'culture add' (someone who brings new perspectives to strengthen the culture) rather than 'culture fit' (someone who is similar to existing team members). Include: how to define cultural values in behavioral terms, how to design interview questions that assess culture add rather than affinity, the specific language to remove from candidate evaluations ('fits in well', 'feels like one of us'), and how to distinguish between genuine culture add assessment and unconscious bias. Include 5 before/after examples of culture fit vs. culture add interview questions.

#### #0429 — Performance Review Calibration Guide

Write the performance review calibration guide for managers. The calibration session brings together 10 managers to ensure consistent rating standards across the company. The guide should cover: the purpose of calibration (alignment, not precision), how to present your team's ratings to the group, how to challenge a peer's rating without creating conflict, how to handle the manager who always rates their team too high, the outcome expected (a distribution that reflects genuine performance differentiation), and how calibration ratings are used in compensation decisions.

#### #0430 — Counter-Offer Decision Guide

Write the decision guide for managers and HR when a high-performing employee has received a counter-offer and is considering leaving. The guide should cover: the data on counter-offers (70% of people who accept counter-offers leave within 12 months — what to do with this), how to assess whether this is a compensation issue (solvable) vs. a leadership or career development issue (less solvable), the conversation to have with the employee, what the company can realistically offer, and when to accept the departure gracefully rather than bidding into a compensation war.

#### #0431 — Remote Hire Onboarding Program

Design the 30-day onboarding program for a fully remote employee who is joining from a different country. The program should account for: the timezone isolation challenge (most of the company is in US Eastern time, new hire is in Singapore), the cultural integration challenge (this is the employee's first US-based company), the technology setup challenge (getting hardware, VPN, and tool access across borders), and the relationship building challenge (making meaningful connections without in-person proximity). Create a week-by-week plan.

#### #0432 — Leadership Transition Plan

Write the leadership transition plan for when a VP-level leader leaves the company (resignation, not termination). The plan covers: the first 24 hours (who is told and in what order), the interim leadership arrangement, the customer notification plan (for the VP of Sales or Customer Success), the knowledge transfer process (what must be documented before departure), the team communication (how to maintain morale and clarity during the gap), and the hiring plan to fill the role permanently.

#### #0433 — HR Technology Stack Review

Write the annual HR technology stack review methodology. The company has 14 HR technology systems costing \$1.8M per year: HRIS, ATS, performance management, LMS, engagement survey, payroll, benefits administration, background checks, onboarding, offboarding, org chart, succession planning, compensation management, and exit interview. The review should: assess each system's usage and satisfaction, identify redundancies and integration gaps, model the cost of consolidation vs. status quo, and recommend the 3 systems to evaluate for replacement in the coming year.

#### #0434 — Sabbatical Policy

Write the sabbatical policy for a company that wants to offer paid sabbaticals to long-tenured employees. The policy should cover: eligibility criteria (typically after 5 years of service), duration (typically 4-8 weeks paid), frequency (once every 5 years), approval process, coverage plan (who handles the employee's responsibilities), the expectation of return commitment, what activities are allowed (travel, personal projects, education — not starting a competing company), and how sabbatical is treated in benefits accrual. Include the business case for why sabbaticals reduce attrition for companies that offer them.

#### #0435 — AI-Assisted Resume Screening Policy

Write the policy for using AI tools to screen resumes. The policy must: define which AI tools are approved, specify that AI can be used to surface candidates but not to eliminate them (a human reviews all AI-flagged-for-rejection candidates), require quarterly bias audits (are candidates from certain groups being systematically screened out?), prohibit using AI to screen for proxies for protected characteristics (graduation year as proxy for age), define the documentation requirements (what is recorded about AI recommendations), and specify the override process when a human disagrees with the AI recommendation.

#### #0436 — Candidate Experience Design

Design the candidate experience for a senior engineering role. The candidate experience should: acknowledge applications within 24 hours (automated but personalized), give candidates a preview of what the interview process involves and why, space the interview stages logically (not 5 interviews in 5 days, which signals poor organization), respect candidates' time (no take-home tests longer than 2 hours for senior roles), give timely feedback (decision within 48 hours of final interview), and treat rejection as a relationship investment (clear, kind rejection letters that leave the door open). Write the communication templates for each stage.

#### #0437 — New People Leader Onboarding

Design the first 90 days for a new Chief People Officer joining a 1,500-person company. Month 1: listen and learn (meet every direct report, all C-suite peers, CEO, board chair, a cross-section of 20 individual contributors and managers). Month 2: diagnose and assess (review engagement data, turnover data, comp benchmarks, HR process maturity, legal/compliance status). Month 3: propose and commit (present CPO's 6-month and 12-month priorities to CEO and board, make one early visible win). Include the questions the CPO should be asking in each phase.

#### #0438 — Skills Taxonomy Development

Write the guide for building a skills taxonomy for a 500-person company. The skills taxonomy defines the skills required across all roles — enabling: structured hiring (we hire for skills not proxies), internal mobility (employees can see what skills open up new roles), learning & development (L&D; investments are tied to priority skills gaps), succession planning (we know which skills are scarce in the pipeline), and compensation (skills-based pay adjustments). The guide should cover: how to build the taxonomy (top-down from strategy vs. bottom-up from job descriptions), the right level of granularity, how to keep it current, and how to integrate it into HR systems.

#### #0439 — Workforce Planning Scenario Analysis

Write the workforce planning scenario analysis for a company preparing 3-year headcount plans under 3 business scenarios: Base (25% revenue growth, stable margins), Upside (40% growth, investing to scale), and Downside (10% growth, restructuring for efficiency). For each scenario, model: total headcount by function at end of year 3, key roles to hire in each scenario, roles to reduce or eliminate in the downside scenario, the talent acquisition investment required, and the total compensation cost. The analysis should help the CFO and CEO make the hiring plan that is resilient to uncertainty.

#### #0440 — Job Architecture Design

Write the guide for designing a job architecture (also called job leveling or career ladder). A job architecture defines: job families (Engineering, Product, Sales, etc.), levels within each family (L1 through L7 or equivalent), the competencies and scope expected at each level, and the compensation range associated with each level. The goal: make career progression transparent, ensure consistent titling across departments, and enable the company to benchmark compensation accurately. Include the design process, the governance model for maintaining it, and how to communicate it to employees.

#### #0441 — Onboarding Survey Design

Design the onboarding survey program. Surveys at 3 checkpoints: Day 14 (is the new hire set up for success? tools, access, 30-day clarity?), Day 60 (has the new hire found their role, their team, their value contribution?), and Day 90 (do they intend to stay for 2+ years? what would improve their onboarding experience?). Write the specific questions for each survey (5-7 questions each), the analysis methodology, and the action protocol for responses indicating a new hire is at risk.

#### #0442 — Manager Effectiveness Survey

Design the manager effectiveness survey — a quarterly pulse survey assessing how well managers are managing. The survey should: be anonymous, be short (8 questions maximum), cover the dimensions most predictive of engagement and retention (psychological safety, developmental feedback, clear direction, support for growth, recognition), produce a manager effectiveness score (aggregate), and trigger an alert to HR when a manager's score is below threshold. Write the 8 questions, the scale, and the reporting format.

#### #0443 — Leadership Assessment Center Design

Design the leadership assessment center for promoting senior managers to the VP level. An assessment center is a structured evaluation using simulated exercises to assess leadership competencies. Include 5 exercises: (1) strategic case study (evaluate a market expansion proposal and present to 'board'), (2) difficult conversation role play (handle a poor performer who is threatening to sue), (3) in-basket exercise (manage 20 emails and make prioritization decisions), (4) 360-degree data presentation (present your own 360 results and development plan), (5) team leadership simulation (lead a cross-functional team through a crisis). Write the exercise briefs, the assessor guide, and the scoring rubric.

#### #0444 — Interview Debrief Protocol

Write the structured interview debrief protocol. Bad debriefs: the first person to speak anchors the group and everyone else agrees. Good debriefs: structured, data-driven, resistant to social influence. The protocol: each interviewer submits a written rating and summary before the group debrief, the debrief facilitator presents the ratings without commentary, each interviewer speaks to their rating in turn (no interruptions), the facilitator synthesizes the group's view, and the hiring manager makes the decision. Write the protocol, the form each interviewer completes, and the facilitation guide.

#### #0445 — Workforce Analytics Dashboard

Design the workforce analytics dashboard for the Chief People Officer. Key metrics: headcount by function and level, voluntary attrition rate (trailing 12 months), involuntary attrition rate, time-to-fill by level and function, offer acceptance rate, new hire retention at 90 and 180 days, employee engagement score, compensation distribution (are there internal equity issues?), and promotion rate. For each metric, define the benchmark (internal trend and external), the refresh frequency, and the action threshold (at what level does this metric require a CPO-level intervention?).

#### #0446 — Succession Planning for Technical Roles

Write the succession planning guide for technical leadership roles (CTO, VP Engineering, Principal Engineer). Technical succession is harder than general leadership succession because technical skills are role-specific and the talent pool is small. The guide should: identify the technical leadership roles requiring succession plans, assess internal candidates against the technical and leadership requirements, identify the gaps for each internal candidate, design the development plans to close the gaps over 24 months, and define the external search readiness plan if no internal candidate is ready.

#### #0447 — Employee Resource Group Charter

Write the charter for a new employee resource group (ERG) — the company's first LGBTQ+ ERG. The charter should cover: purpose and mission, membership (who can join, how allies are included), leadership structure (co-leads, advisory sponsor from senior leadership), activities (what the ERG does — events, education, policy advocacy, community partnerships), budget (\$15K/year from diversity budget), governance (how the ERG reports to HR and the diversity council), and success metrics (membership growth, events run, policies influenced). Follow best practices from Catalyst and McKinsey research.

#### #0448 — Compensation Equity Audit

Write the methodology for a compensation equity audit. The audit should: collect compensation data for all employees with job title, level, years of experience, and performance rating, apply a regression model to identify compensation gaps by gender, race, and other protected characteristics, distinguish between 'like for like' gaps (same role, same level — these must be corrected) and 'representation gaps' (women are underrepresented in senior roles — these require structural interventions beyond pay), and produce the findings report with remediation plan for pay adjustments.

#### #0449 — Global Benefits Benchmark

Design the global benefits benchmarking study for a company expanding from US-only to operating in UK, Germany, Singapore, and Brazil. For each country: what is legally required (statutory minimum), what is market standard for the company's industry and size, and what differentiated benefits drive talent attraction in that market. Create a benefits comparison table and identify the gaps between the company's current US-centric benefits and the requirements of each new market. Budget estimate required for each new market.

#### #0450 — Internal Mobility Program

Design the internal mobility program for a 500-person company with a 25% annual attrition rate (significantly above the 15% industry benchmark). Research shows that employees who have moved internally have 50% lower attrition. The program should: create a transparent internal job board (all open roles are posted internally for 5 business days before external posting), train managers to support (not resist) their team members' internal moves, design the lateral move process (how an employee expresses interest without jeopardizing their current role), and measure mobility rate and correlation with retention.

#### #0451 — HR Business Partner Model

Write the HR Business Partner (HRBP) operating model for a company transitioning from transactional HR to strategic HR. Current state: HRBPs spend 70% of time on administrative tasks (employee relations, compliance, benefits questions). Target state: HRBPs spend 70% of time on strategic work (talent planning, performance management quality, leadership development). The model should: define the strategic work HRBPs should own, define what gets moved to a shared services model (administrative work), the competency profile of a strategic HRBP, and the transition plan for current HRBPs who may not be able to make the shift.

#### #0452 — Candidate Referral Program

Design the employee referral program for technical roles. The company needs to hire 80 engineers in the next 12 months. Referrals are the highest quality and lowest cost source. The program should: set the referral bonus (\$5K for senior engineer, \$8K for principal engineer — paid 50% at hire, 50% at 6 months), define the referral process (simple — one form, one point of contact), communicate it regularly (not just once at launch), create a feedback loop (referring employees always know the status of their referral), and set a target (40% of engineering hires from referrals within 6 months of program launch).

#### #0453 — HR Metrics Monthly Report

Write the HR metrics monthly report format for the CEO. The report should fit in one page and cover: voluntary attrition (current month and trailing 12 months vs. benchmark), headcount vs. plan (are we hiring on target?), time-to-fill for priority roles, new hire retention at 90 days, engagement score (from last pulse survey), and top 3 people issues requiring CEO attention. The report should be factual and forward-looking — not a recap but a forward guide to people decisions required in the next 30 days.

#### #0454 — Exit Interview Analysis Framework

Write the exit interview analysis framework. Current state: exit interviews are conducted but the data is never analyzed systematically. The framework should: standardize the exit interview questions (10 questions covering: reason for leaving, management experience, career development, company culture, compensation, and what would have made them stay), aggregate responses into quarterly themes, present findings to the leadership team with specific recommendations (not just 'culture issues were mentioned'), and track whether exit interview themes are improving over time. Include the question set and the analysis methodology.

#### #0455 — Compensation for Remote Workers

Write the compensation policy for remote workers in different geographies. The company is based in San Francisco and currently pays everyone SF market rates. As the company hires more remote workers in lower cost-of-living markets, the question arises: do we pay based on the employee's location or the company's location? Options: (1) pay everyone SF rates (expensive, but simple and no equity issues), (2) pay market rates by location with cost-of-living adjustments, (3) use national pay bands that pay above market in most cities but slightly below SF. Recommend option 3 with the methodology for setting national bands.

#### #0456 — People Manager Training Program

Design the people manager training program for managers who are newly promoted from individual contributor roles. Most management failures happen in the first 12 months when the new manager is still operating as an individual contributor. The program should: cover the mindset shift (your job is to make your team successful, not to do the work yourself), practical skills (feedback, performance conversations, hiring, delegation), and provide ongoing support (peer manager community, coaching). Format: 4 x half-day workshops in the first 90 days plus monthly peer learning sessions. Include the workshop curriculum outlines.

#### #0457 — HR Technology AI Governance

Write the AI governance policy for HR technology. AI is increasingly used in HR for resume screening, performance rating calibration, attrition prediction, and compensation setting. Each AI application in HR has significant fairness and legal risk. The policy should: require a bias audit before any AI tool is deployed in HR, prohibit AI from making final decisions on hiring, promotion, or compensation without human review, require disclosure to employees when AI is used in decisions affecting them, and establish an annual review of all AI tools in HR to assess ongoing compliance.

#### #0458 — Disability Inclusion Program

Design the disability inclusion program for a company that has identified its accessibility and accommodation process as a gap. Current state: accommodation requests take 30+ days and are handled inconsistently. The program should: create a streamlined accommodation process (goal: 5 business day response), train managers on disability inclusion and accommodation obligations, audit the workplace and digital tools for accessibility gaps, establish a disability ERG, and set measurable inclusion targets (SHRM recommends tracking accommodation request volume and approval rate as inclusion indicators). Reference ADA, UK Equality Act, and UN CRPD.

#### #0459 — HR Compliance Calendar

Write the HR compliance calendar for a US-based company with employees in 10 states. The calendar should include: federal compliance deadlines (EEO-1 filing, VETS-4212, ACA reporting, OSHA recordkeeping), state-specific deadlines for the 10 states (pay equity reports where required, minimum wage increases, leave law updates), and internal compliance activities (I-9 audit, compensation equity review, benefits plan audit, mandatory training completion). Format as a monthly calendar with the responsible owner and the consequence of missing each deadline.

#### #0460 — Toxic High Performer Protocol

Write the protocol for managing a high-performing employee who exhibits toxic behaviors. The 'brilliant jerk' problem: this person delivers above-quota results but creates a hostile environment for their team. Research: the cost of a toxic high performer (team attrition attributable to them, productivity loss from psychological safety damage) typically exceeds their individual contribution. The protocol: document specific behaviors (not personality traits), deliver direct feedback with specific behavioral requirements, set a 90-day improvement period with measurable behavior change criteria, and make the termination decision if behaviors don't change — even for the top performer.

#### #0461 — Hiring Manager Certification

Design the hiring manager certification program. Uncertified hiring managers produce inconsistent interview processes, make poor hiring decisions, and create legal risk. The certification program should: require all hiring managers to complete 4 hours of training before conducting their first interview, cover legal requirements (what not to ask), structured interview technique, bias awareness, and candidate experience best practices, include a practical component (conduct a mock interview and receive feedback), and require recertification every 2 years. Write the curriculum, the certification test, and the recertification requirements.

#### #0462 — Employee Handbook Update

Write the guide for conducting the annual employee handbook update. The handbook update should: review all policies for compliance with changes in law (federal, state, local — note any jurisdiction with new employment laws effective January 1), identify policies that have drifted from current practice (the worst outcome: employees are told one thing in the handbook and see something different in practice), solicit input from employees on policies that are confusing or outdated, and publish the updated handbook with a summary of changes. Include the review checklist and the legal review requirement.

#### #0463 — Talent Attraction Employer Brand

Write the employer brand positioning for a company competing against FAANG for engineering talent. The company cannot match FAANG compensation. The differentiation strategy: mission (working on meaningful problems vs. ad optimization), impact (engineers can see the direct impact of their work), ownership (small teams with real ownership vs. large teams with narrow scope), culture (no meeting culture, async-first, results-focused), and growth (engineers grow faster in a smaller company with broader exposure). Write the employer brand statement, the 3 core messages, and the channels to amplify them (LinkedIn, GitHub, tech conferences, engineering blog).

#### #0464 — Reduction in Force Legal Compliance

Write the RIF (reduction in force) legal compliance checklist for a 150-person layoff. The checklist should cover: WARN Act requirements (60-day notice for companies with 100+ employees laying off 33%+ of workforce), state-specific WARN laws (several states have stricter requirements than federal), ADEA compliance (the statistical analysis required to ensure age is not a factor in selection), final pay requirements by state, severance agreement release requirements (21-day consideration period, 7-day revocation period for ADEA releases), and COBRA notification requirements. Include the required documentation.

#### #0465 — Employee NPS (eNPS) Program

Design the employee NPS (eNPS) program. eNPS is the single-question survey: 'On a scale of 0-10, how likely are you to recommend working here to a friend or colleague?' The program should: run quarterly (bi-annually for smaller companies), achieve at least 80% response rate through psychological safety and active leadership participation, follow up with 2-3 open-ended questions to diagnose the score, present results to the leadership team with trend analysis, and set an action requirement: each leadership team member must commit to one eNPS-improvement action per quarter.

#### #0466 — HR Tech Stack Architecture

Design the HR technology stack architecture for a 300-person company. Required components: HRIS (system of record — Workday, BambooHR, or equivalent), ATS (recruiting — Greenhouse, Lever, Ashby), performance management (Lattice, Culture Amp), payroll (ADP, Gusto, Rippling), benefits administration (Benefitfocus, Businessolver), and learning management (LinkedIn Learning, 360Learning). Key design principle: the HRIS is the single source of truth — all other systems sync to it. Write the integration requirements, the data governance model, and the vendor selection priorities.

#### #0467 — Return-to-Work After Leave Program

Design the return-to-work program for employees returning from extended leaves (parental leave, medical leave, caregiver leave — leaves of 8+ weeks). Research shows that failure to support the return-to-work transition causes 40% of leave-takers to leave within 12 months of return. The program should: schedule a pre-return conversation 2 weeks before return (what does the employee need to feel set up for success?), create a 30-day re-ramp plan (reduced scope and communication volume in weeks 1-2), assign a return-to-work buddy, and check in at 30, 60, and 90 days. Write the program materials.

#### #0468 — 360 Feedback Process Design

Design the 360 feedback process for VP-level leaders. The process should: select raters thoughtfully (5-8 raters, include direct reports, peers, and one or two skip-levels — not cherry-picked by the rated individual), use a standardized competency framework (same 15 competencies for all VPs), ensure anonymity (direct report responses are aggregated, never attributed), pair feedback with a coaching conversation (feedback alone without guidance is often counterproductive), and connect 360 insights to the individual's development plan. Write the rating scale, the question set, and the debrief guide.

#### #0469 — Internship Program Design

Design the summer internship program for 20 interns across engineering, product, and business roles. The program should: match interns to meaningful projects (not busy work — interns should be able to describe their project's impact in a portfolio), provide structured learning (weekly intern learning sessions on company strategy, career development, and industry trends), create a conversion framework (what does a successful intern look like? what % should receive full-time offers?), and design the intern experience to generate employer brand advocacy (interns talk about their experience publicly). Budget: \$5K per intern for program activities.

#### #0470 — Total Rewards Philosophy

Write the total rewards philosophy statement for a growth-stage company (Series C, 300 employees). The philosophy should cover: cash compensation positioning (50th-75th percentile of relevant market), equity compensation (meaningful ownership for all employees, not just executives), benefits (cover 100% of health insurance premiums for employee, 50% for dependents), learning and development investment (\$2,000/year per employee), time off (unlimited PTO with 10-day minimum encouraged), and flexibility (remote-first, flexible hours). Write the philosophy as a public-facing document that can be shared with candidates.

#### #0471 — AI Workforce Transition Program

Write the AI workforce transition program for a company that is automating 15% of its administrative roles through AI over the next 18 months. The transition program should: identify which employees are in affected roles 12 months before automation goes live, offer retraining for AI-adjacent roles (AI tool operations, data quality management, AI-assisted customer service — roles that work alongside AI rather than being replaced by it), provide career counseling and job placement assistance for employees who cannot be reupskilled, and design the internal communication strategy (employees should not learn about automation from the press).

#### #0472 — Flexible Work Policy Design

Write the flexible work policy for a company that wants to be more flexible than traditional 9-5 while ensuring collaborative work gets done. The policy should cover: core hours (all employees available 10am–3pm in their local timezone), flexible hours for the remaining time (start early, end late, take long breaks — output focused, not hours focused), meeting-free days (no internal meetings on Wednesdays), remote work (employees can work from anywhere in the country — overseas work requires pre-approval for tax and employment law compliance), and the management principle (judge people on outcomes, not hours observed).

#### #0473 — Diversity Recruiting Strategy

Write the diversity recruiting strategy for a company whose engineering team is 85% male and 78% white/Asian. The strategy should: diagnose where the pipeline gaps are (diverse candidates not applying? applying but not passing? passing the process but not accepting offers?), propose specific interventions at each stage (job descriptions that use inclusive language, diverse candidate slates required, diverse interview panels, consistent debrief process, compensation transparency to reduce offer decline), and set measurable targets for representation improvement over 2 years. Avoid tokenism: the goal is a fair process that attracts and evaluates talent from all backgrounds.

#### #0474 — Diversity Interview Panel Policy

Write the policy requiring diverse interview panels for all VP+ hires. Research shows that diverse interview panels reduce bias in hiring decisions and signal inclusion to candidates. The policy should: define what constitutes a 'diverse panel' for each hire (minimum 2 of 5 interviewers from underrepresented groups), the exception process when a diverse panel cannot be assembled (escalation to HR, delay the hire if needed), the tracking requirement (record panel composition for each hire), and the accountability mechanism (quarterly report to the CPO on compliance rate).

#### #0475 — Mental Health Benefits Strategy

Write the mental health benefits strategy. Mental health is the leading cause of disability and a significant driver of lost productivity and attrition. The strategy should: audit current mental health benefits (is the EAP actually used? is the therapy reimbursement limit competitive?), benchmark against peer companies, propose improvements (remove copays for mental health visits, expand therapy sessions covered, add mental health days as distinct from sick leave), and measure impact (utilization of mental health benefits, reduction in disability claims). Budget: \$500K/year incremental. ROI: 3:1 (reduced disability costs + productivity improvement).

#### #0476 — Termination Letter Templates

Write the HR termination letter templates for 3 scenarios: (1) involuntary termination for performance with severance (2 months salary, benefits through end of month), (2) involuntary termination for cause (no severance), and (3) layoff with severance (2 months salary + 1 week per year of service). Each letter should: state the termination effective date, the severance terms (if any), the logistics (return of equipment, final paycheck, COBRA information), the confidentiality reminder (non-disclosure agreement is still in effect), and the signature block. Include a note on the legal review requirement before sending any termination letter.

#### #0477 — Total Rewards Communication

Write the total rewards communication for open enrollment. The communication should help employees understand the full value of their compensation (not just base salary). It should include: the statement of total rewards (salary + bonus + equity + benefits + time off = total value), the benefits overview and any changes for the coming year, the enrollment deadline and the steps required, the resources available for questions (benefits fair, HR FAQ, comparison tool), and the recommended actions for common employee situations (new baby: check the parental leave and dependent care FSA; new house: check voluntary life insurance; healthcare cost concerns: compare plan options with the decision tool).

#### #0478 — Promotion Calibration Process

Write the promotion calibration process for the semi-annual promotion cycle. The calibration session ensures that promotions are consistent across the company — not driven by which manager advocates most forcefully. The process should: require managers to submit promotion recommendations with documented evidence (not just 'they are ready'), hold calibration sessions by level and function (all VP-to-SVP promotions reviewed together), use a consistent criteria rubric (specific competencies required at the next level), address the common biases (recency bias, in-group bias, gender and race bias in performance language), and ensure the total promotion rate is in line with company expectations and budget.

#### #0479 — Employee Engagement Survey Action Planning

Write the action planning process for the annual employee engagement survey. The survey results are in: overall engagement score is 72 (below the industry benchmark of 76), with the lowest scores in: manager effectiveness (68), career development (65), and recognition (66). The action planning process should: assign each focus area to an executive owner, set 12-month targets for each focus area, design specific interventions (not 'improve manager effectiveness' — define the specific manager training program), communicate the action plan to employees, and establish the monthly tracking mechanism to assess progress before the next survey.

#### #0480 — HR Legal Risk Assessment

Write the annual HR legal risk assessment. The assessment should identify the top 10 employment law risks based on: the company's growth trajectory (rapid hiring creates classification and documentation risks), the geographic expansion (operating in new states creates new legal obligations), recent employee relations incidents (were there any situations that created potential legal exposure?), policy gaps (are there practices that are common but not documented in policy?), and upcoming regulatory changes (any new employment laws effective in the next 12 months?). For each risk, write the likelihood, the potential cost, and the mitigation action.

#### #0481 — People Analytics Roadmap

Write the people analytics roadmap for the next 2 years. Year 1 capabilities: attrition prediction model (predict who will leave before they decide to), time-to-fill optimization (identify the bottlenecks in the hiring process), offer acceptance rate analysis (what factors predict offer acceptance?), and engagement driver analysis (which engagement factors most predict retention?). Year 2 capabilities: succession readiness prediction (which employees are ready to move to the next level?), team performance analytics (what team compositions predict high performance?), and learning effectiveness analysis (which training programs improve retention and performance?). Write the data requirements, the tooling, and the talent required.

#### #0482 — Parental Leave Policy

Write the parental leave policy. The company wants to be competitive for talent from both large companies (Google: 18-24 weeks for primary caregiver) and progressive tech companies. Proposed policy: 20 weeks fully paid for primary caregiver (biological, adoptive, or surrogacy), 12 weeks fully paid for secondary caregiver, with no distinction between maternal/paternal, same-sex couples, or adoption. Return-to-work support: 4-week gradual return option (50% time for the first 4 weeks). Write the policy, the eligibility criteria, the interaction with state leave laws (California, New York, etc.), and the communication plan.

#### #0483 — Employee Wellbeing Program Design

Design the employee wellbeing program. Wellbeing is not a ping-pong table — it is the conditions under which employees can sustain high performance over time. The program should address 4 dimensions: Physical (fitness benefit, ergonomic assessments, nutrition), Mental (mental health support, mindfulness programs, manager training on psychological safety), Financial (financial planning resources, student loan assistance, equity education), and Social (team connection activities, community, belonging). Budget: \$1,500/employee/year. Measure impact through the wellbeing index in the engagement survey and compare to attrition and productivity data.

#### #0484 — Global HR Compliance Tracker

Write the global HR compliance tracker for a company with employees in 10 countries. For each country, the tracker should monitor: minimum wage (current and effective date of next change), required benefits (statutory health insurance, pension contributions, paid leave), termination requirements (notice periods, severance, process requirements), tax and payroll obligations, data privacy obligations for HR data, and upcoming regulatory changes. The tracker is reviewed quarterly by HR and the legal team. Write the format, the 10-country list, and the escalation process for compliance gaps.

#### #0485 — Performance Improvement Plan Template

Write the Performance Improvement Plan (PIP) template. A PIP is a structured process for managing underperformance. The template should include: the specific performance deficiencies (concrete examples with dates, not vague descriptions), the performance expectations going forward (specific, measurable behaviors and outcomes), the support provided (manager meetings, training, coaching), the review timeline (30, 60, 90 days), the consequences if the plan is not met, and the employee's acknowledgment. Include guidance notes for managers on how to use the template without creating legal risk (PIPs must be fair, specific, and applied consistently).

#### #0486 — Employee Handbook: AI Usage Policy

Write the AI usage policy section for the company employee handbook. Employees want to use AI tools to do their jobs better. The policy should: enable productive AI use (approved tools list), protect the company's data (no customer data, no proprietary information in public AI tools), ensure quality (employees are responsible for reviewing all AI outputs before using them professionally), maintain attribution standards (employees disclose AI use in external deliverables as required), and set the training requirement (all employees complete 2-hour AI literacy training before using company AI tools). Write the policy in plain language.

#### #0487 — Global Hiring Manager Network

Write the design for a global hiring manager network — a community of 200 managers who hire regularly and want to improve their hiring quality. The network should: provide a peer community for sharing hiring practices, offer quarterly skill-building workshops (structured interviews, candidate experience design, offer negotiation), create a shared repository of interview questions by role family, and produce a quarterly 'state of hiring' report (what's working, what's changing in the talent market, what skills are scarce). The network is managed by the talent acquisition team with 10 hours of investment per quarter.

#### #0488 — Talent Mapping Exercise

Write the talent mapping exercise for the top 50 senior managers and directors (the 'ready now' succession pool). Talent mapping places each person on a 9-box grid (performance on one axis, potential on the other). The exercise should: define 'performance' (OKR achievement + behavioral assessment) and 'potential' (leadership aspiration + learning agility + results in expanded scope), calibrate the placements across the executive team (reduce recency and halo bias), identify the top 10 high-potential employees for accelerated development, and identify the bottom-right quadrant (high performance, low potential) for honest career conversations about their ceiling.

#### #0489 — Comp Refresh Process

Write the compensation refresh process for a company that has never done a market adjustment cycle. As the company has grown, some employees hired 3 years ago at below-market rates have not had their compensation updated to reflect market movements. The process should: run a market compensation analysis using 3 data sources (Radford, Levels.fyi, and company offer data), identify employees who are below the 50th percentile of their market range, calculate the cost of bringing all employees to market, prioritize by retention risk (employees with competitive offers pending are prioritized), and create the manager communication guide for discussing comp adjustments.

#### #0490 — Internship Conversion Strategy

Write the internship to full-time conversion strategy. The company hires 30 summer interns with the intention of converting the top performers to full-time offers. Current conversion rate: 45% (industry benchmark: 60%). The gap is caused by: weak performance feedback to interns (they don't know if they're getting an offer), late offer timing (some interns have accepted other offers before the company extends), and insufficient relationship building (interns don't feel connected to the company's mission). The strategy should: implement weekly performance feedback for all interns, extend offers in week 10 of a 12-week internship, and design 3 relationship touchpoints with senior leaders.

#### #0491 — HR Policy Translation Guide

Write the HR policy translation guide for a company with employees in 12 countries whose HR policies were written in English by a US-based team. The guide should: identify the policies that require legal review before applying in non-US jurisdictions (termination policies, at-will employment, non-compete clauses), specify the jurisdictions where US-standard policies cannot be applied without modification (UK, Germany, France, and Brazil each have significant differences), create a policy localization process (US policy + local legal review + local HR review = localized policy), and establish the governance for keeping localized policies current as local laws change.

#### #0492 — Engagement Survey Vendor Selection

Write the engagement survey vendor selection guide. The company wants to move from an internally designed survey to a best-in-class vendor. Evaluation criteria: question validity and benchmarking (does the vendor benchmark against industry peers?), manager reporting (do managers get their own dashboard with actionable insights?), data security (how is employee data protected?), integration with HRIS (does the survey data flow into the HR system?), support model (what support is available for survey design and action planning?), and pricing. Evaluate Glint, Culture Amp, Qualtrics, and Lattice. Write the evaluation scorecard and a recommendation.

#### #0493 — Leadership Competency Framework

Write the leadership competency framework for a technology company. The framework should define 8 core leadership competencies: (1) Strategic thinking, (2) Building high-performing teams, (3) Customer obsession, (4) Innovation and growth mindset, (5) Operational excellence, (6) Developing talent, (7) Communication and influence, and (8) Integrity and values. For each competency, define the behaviors at 3 levels: Manager, Senior Manager/Director, and VP/Executive. The framework should be used for: performance reviews, promotion decisions, 360 feedback, and succession planning.

#### #0494 — New HRIS Implementation

Write the HRIS implementation plan for migrating from BambooHR to Workday. The migration involves: 500 employee records, 5 years of employment history, current benefits enrollment data, payroll history (18 months), org chart structure, and custom fields built in BambooHR. The implementation plan should: data migration strategy (how is data cleaned and transferred?), parallel running period (run both systems simultaneously for 1 month), training plan (all HR team members trained before go-live, all managers trained in self-service features), cutover plan (the final transition to Workday only), and go-live support (dedicated help desk for the first 2 weeks post-cutover).

#### #0495 — Onboarding Technology Stack

Write the onboarding technology stack design. New hire onboarding in 2026 requires: document e-signature (for offer letters, NDAs, and policy acknowledgments), IT provisioning automation (account creation before Day 1), pre-boarding portal (the new hire's experience before their first day), onboarding checklist (for the manager and the new hire), training LMS (for compliance training and role-specific onboarding modules), and buddy matching (algorithm to match new hires with experienced employees). Write the technology requirements, vendor options, and integration points between systems.

#### #0496 — Compensation for AI Specialists

Write the compensation strategy for AI specialist roles that the company needs to recruit. AI talent commands a significant premium: senior ML engineers at top companies earn \$400K-\$600K total compensation (salary + bonus + equity), and the market is fiercely competitive. The company's options: (1) pay market rates (expensive, requires board approval for budget), (2) compete on equity (offer below-cash-market compensation with above-market equity — works for candidates who believe in the company's AI vision), (3) target non-FAANG candidates (experienced ML engineers who prefer the mission and culture over maximum compensation). Write the compensation strategy, the equity grant sizes, and the trade-offs.

#### #0497 — Continuous Feedback System Design

Design the continuous feedback system to replace the annual performance review. The system should: encourage feedback at natural work moments (end of a project, after a presentation, post-product launch), make feedback easy to give (mobile-first, 3-minute maximum), ensure feedback is actionable (use a specific framework: Situation-Behavior-Impact), aggregate feedback into a quarterly development summary for each employee, and protect psychological safety (managers can see aggregate themes, not individual feedback items). Write the system requirements, the feedback framework, and the change management plan.

#### #0498 — HR Function Annual Review

Write the HR function annual review format. The CPO presents the annual review to the CEO and executive team. Sections: Year-in-review (key milestones, major projects completed, and program launches), People metrics performance (attrition, time-to-fill, engagement, compensation positioning), HR function effectiveness (how effective was the HR function as an internal service provider — measured by manager NPS of HR), Investment summary (HR budget spend vs. plan), and Priorities for next year (the top 3 HR strategic priorities with investment requirements). Format: 30-minute presentation, data-rich, narrative concise.

#### #0499 — Director of HR Search Brief

Write the search brief for a Director of HR Business Partners. The company is scaling from 300 to 600 employees and needs a senior HRBP leader to build the HRBP function. The search brief should: define the role scope (leading a team of 3 HRBPs, partnering with the CEO's direct reports), the required experience (8-10 years of progressive HR business partnering in a high-growth technology company), the skills (data-driven decision making, executive coaching capability, change management expertise), the cultural fit (comfortable with ambiguity, strong bias for action), and the compensation package (\$180-200K base + bonus + equity). Include the 5 most important interview questions.

#### #0500 — Workforce Reduction Communication

Write the all-staff communication for a 10% workforce reduction. This is the hardest message a CEO sends. The communication should: be direct (do not bury the news in corporate language), explain the rationale briefly but honestly (business conditions changed — what specifically?), describe who is affected and the process (affected employees are being notified separately, right now), describe what support is being provided (severance, benefits continuation, outplacement), express authentic care for the people leaving, and give the remaining team a reason to believe in the path forward. Write the communication for both the affected employees and the remaining team.

#### #0501 — HR Annual Talent Report

Write the annual HR talent report for the board. Sections: Talent health (engagement score, attrition, new hire quality), Talent acquisition (hiring vs. plan, time-to-fill, offer acceptance rate, top talent added), Talent development (program completion, promotion rates, internal mobility), Organizational health (management effectiveness score, culture survey results), Compensation and benefits (market positioning, pay equity status, benefits benchmarking), and Talent risks and opportunities (top 3 talent risks and the mitigation plan, top 3 opportunities to strengthen talent position). Length: 8-10 slides for the board package.

#### #0502 — HR Data Privacy Policy

Write the HR data privacy policy for employee personal data. Employees trust the company with their most sensitive personal information: health data, financial information, immigration status, and family information. The policy should: define what HR data is collected and why, the legal basis for processing each data category, the data retention schedule (how long each category is kept), employees' data rights (access, correction, deletion under GDPR and CCPA), the data breach notification process for HR data, and the third-party processors who have access to HR data. Write the policy and the employee communication.

### #0503 — DEI Metrics Dashboard

Design the DEI (Diversity, Equity, and Inclusion) metrics dashboard for quarterly board reporting. Metrics: representation by gender and race at each level (IC, Manager, Director, VP, C-suite), hiring diversity (% of candidates and offers to underrepresented groups), promotion rate parity (are underrepresented groups promoted at the same rate as their represented peers?), pay equity index (ratio of average pay for underrepresented groups vs. represented groups at the same level), and inclusion score (from the engagement survey question: 'I feel I belong here'). For each metric, show current, trend, and target.

### #0504 — Return to Work Policy: Mental Health Leave

Write the return-to-work policy for employees returning from mental health leave. Mental health leave requires different support than physical health leave: the return should be gradual, the work environment must be assessed for stress factors, and the employee's manager must be briefed on accommodation needs without violating medical confidentiality. The policy should: define a 4-week graduated return protocol, assign an HR business partner to support the return, require a reasonable accommodation conversation before the return date, and prohibit the manager from asking the employee about their diagnosis.

### #0505 — Manager Accountability for Inclusion

Write the manager accountability framework for inclusion. Managers are the biggest determinant of whether employees from underrepresented groups feel included. The framework should: include inclusion-specific questions in the annual 360 feedback (does this manager create an inclusive environment?), connect inclusion feedback to manager performance reviews, provide managers whose inclusion scores are below threshold with coaching and training, and report inclusion metrics by manager to the CPO quarterly. Write the framework, the inclusion questions, and the manager coaching protocol.

### #0506 — Skills-Based Hiring Pilot

Write the skills-based hiring pilot design. The company currently requires college degrees for many roles that do not actually need a degree. The pilot will: identify 5 roles that are degree-gated but should not be, rewrite the job descriptions without degree requirements, design skill assessments that test the actual competencies needed, track the quality of hires (90-day retention, performance review scores) for degree vs. non-degree hires, and evaluate whether to expand skills-based hiring to all roles after 12 months. Write the pilot design and the success criteria.

### #0507 — HR Brand Audit

Write the HR brand audit methodology. The employer brand is what current and potential employees think and say about working at the company. The audit should: analyze Glassdoor and Indeed reviews for theme frequency, compare the company's employer brand perception to its stated values (gap analysis), survey recent hires on why they chose the company and whether it matches expectations, survey recent departures on why they left, and produce an employer brand positioning report with specific recommendations for closing the perception-reality gap. Write the methodology and the survey instruments.

### #0508 — Employee Experience Design Principles

Write the employee experience design principles for a people-first company. The principles should guide every HR policy and program decision. Principles: (1) Design for the many, accommodate the few (policies should work for the median employee, with flex for edge cases), (2) Make the right thing the easy thing (the default choice should be the good choice), (3) Treat employees as intelligent adults (explain the 'why', not just the 'what'), (4) Fix the system, not the person (when a process fails, redesign the process), and (5) Measure what matters (track employee experience metrics, not HR activity metrics). Write each principle with 3 practical implications.

## SECTION 05

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83 unique prompts for senior executives

#### #0509 — Software RFP for AI Platform — CREATE Format

Context: Your company (a 900-person professional services firm) is evaluating enterprise AI platforms. You have shortlisted 4 vendors: Microsoft Copilot, Google Workspace AI, Anthropic Claude for Enterprise, and a custom build using OpenAI API. The budget is \$2.5M over 3 years. Use cases: internal knowledge management, client proposal drafting, research synthesis, and meeting summarization. Request: Write the RFP document. Include: company overview and project background, scope of services required, mandatory requirements vs. nice-to-haves, evaluation criteria with weightings (weighted at least 30% on security and data governance), submission format requirements, evaluation timeline, and terms under which the company reserves the right to award to none of the vendors. Adjustments: The firm handles sensitive client data — data residency, model training opt-out, and enterprise SLA are non-negotiables. Any vendor who cannot guarantee client data never trains their models is automatically disqualified. Tone: Formal and precise. This is a legal document.

#### #0510 — Vendor Risk Assessment Framework — One-Shot

You are evaluating a critical vendor: an AI company that will process your customer data for fraud detection. Before signing a \$3M 3-year contract, you need to assess vendor risk. Use this vendor risk assessment framework: 'Financial Risk: Is the vendor financially stable? (Check: funding runway if startup, credit rating if public, revenue growth) Operational Risk: Can they meet the SLA? (Check: uptime history, incident response time, DRP) Security Risk: How do they protect our data? (Check: SOC2 Type II, ISO27001, penetration test frequency, breach history) Concentration Risk: How dependent would we be? (Check: portability of our data, migration cost, alternative vendors) Regulatory Risk: Are they compliant with our regulatory requirements? (Check: GDPR, SOC2, AI Act for AI vendors) Strategic Risk: Will they still exist in 3 years? (Check: funding, customer concentration, leadership stability)' Apply this framework to the vendor evaluation for the AI fraud detection system. Include a scoring matrix and final risk rating (High/Medium/Low) with a recommendation.

#### #0511 — Contract Negotiation Briefing — One-Shot

You are entering negotiations with your largest software vendor (annual spend: \$1.8M). The contract is up for renewal in 60 days. The vendor has proposed a 22% price increase citing inflation and product investment. Write the negotiation briefing for the team. Format: 'Negotiation Objective: [What we want to achieve] Our Leverage: [Why we have negotiating power] Their Leverage: [What gives them power over us] Walk-Away Point: [The terms at which we do not renew and switch vendors] Ideal Outcome: [The deal we walk away happy with] Acceptable Outcome: [The minimum acceptable deal] Opening Position: [What we say in the first meeting] Concession Strategy: [What we give up, in what order, for what in return] Non-Negotiables: [What we will not compromise on regardless]' Apply this framework to the vendor renewal scenario above.

#### #0512 — AI Vendor Security Questionnaire

Write a 30-question security questionnaire for AI vendors that will process enterprise data. Sections: (1) data handling and storage (where data is stored, encryption standards, data retention), (2) model training opt-out (does our data train their models?), (3) access controls and authentication, (4) incident response and breach notification (SLA for notifying us), (5) compliance certifications (SOC2, ISO27001, GDPR, HIPAA if applicable), (6) AI-specific risks (model versioning, output auditing, hallucination rate monitoring). For each question, note what constitutes an acceptable answer.

#### #0513 — Procurement Policy for AI Tools

Write the company procurement policy for AI tools specifically. The policy must cover: approved AI tool categories and specific tools on the approved list, the approval process for new AI tools (who approves at what spend level), data classification rules (which data can be entered into which AI tools), employee attestation requirements before using AI tools with customer data, prohibited uses, and the review cycle for updating the approved list. This policy is in response to employees using unauthorized AI tools with customer data.

#### #0514 — Vendor Performance Review Meeting Agenda

Design the quarterly vendor performance review meeting agenda for a critical technology vendor. The meeting is 90 minutes and includes the vendor's Customer Success team and your internal IT, Finance, and Operations teams. Agenda items: SLA performance review (uptime, response time, resolution time vs. contractual commitments), open support ticket review, roadmap update and alignment with our needs, commercial review (usage vs. contracted, forecast for next quarter), relationship health (what is working, what is not), action items and owners. Include facilitation notes for managing a vendor who is defensive about SLA misses.

#### #0515 — SaaS Rationalization Strategy

Your company has 180 active SaaS subscriptions costing \$4.2M annually. The CFO wants a 25% cost reduction within 6 months. Write the SaaS rationalization strategy: how to audit the full SaaS portfolio (tool discovery methodology), categorization framework (mission-critical vs. useful vs. redundant), the consolidation approach (which tools to eliminate, which to consolidate), the negotiation strategy for reducing costs on retained tools, the change management plan for tools being sunset, and a savings tracking dashboard. Expected output: \$1M+ savings.

#### #0516 — Procurement ROI Report for Board

Write the annual procurement report for the board audit committee. The company spent \$45M on external vendors last year. The report should cover: total vendor spend by category, savings achieved vs. prior year (through negotiations, consolidation, better terms), strategic vendors (top 10 by spend) and the health of those relationships, vendor risk summary (any at-risk relationships), key contracts expiring in the next 12 months and renewal strategy, and the procurement team's 3-year roadmap for improving vendor management capability.

#### #0517 — Statement of Work Template

Create a reusable Statement of Work (SOW) template for professional services engagements. The template should include: project overview and objectives, scope of services (in scope and explicitly out of scope), deliverables with acceptance criteria, project timeline with milestones, team and resource requirements (roles, responsibilities, time commitments from both parties), fees and payment schedule, assumptions and dependencies, change control process, intellectual property ownership, and termination provisions. Include guidance notes for customizing each section.

#### #0518 — Supplier Diversity Policy

Write the supplier diversity policy for a \$500M revenue company. The policy should cover: definition of diverse suppliers (minority-owned, women-owned, veteran-owned, LGBTQ+-owned, disability-owned), the company's commitment (% of addressable spend target), the process for identifying and certifying diverse suppliers, how procurement managers are incentivized to meet diversity targets, the reporting and governance structure, and how the company supports development of diverse suppliers (mentorship, payment terms preference, capacity building). Set a realistic 3-year target trajectory.

#### #0519 — Sole Source Justification

Write the sole source justification memo for procuring an AI platform without competitive bidding. The vendor is the only one with the required compliance certifications for the financial services industry (SOC2 Type II, FedRAMP Moderate). The memo should: document the basis for sole source procurement, confirm that no other vendors meet the technical specifications, note that market research was conducted, describe the price reasonableness determination, and obtain appropriate approval signatures. This memo will be reviewed by the audit committee.

### #0520 — Vendor Onboarding Checklist

Create the comprehensive vendor onboarding checklist for new technology vendors. The checklist covers: legal (contract executed, NDA signed, DPA signed for data processing), security (security questionnaire completed, compliance certificates on file, third-party risk rating assigned), finance (payment terms established, banking details verified, PO system set up), IT (vendor access provisioned within least-privilege principle, data sharing agreements), and operations (service owner assigned, escalation contacts documented, SLA tracking initiated). Format as a task list with owners and due dates.

### #0521 — Contract Renewal Decision Framework

Write the framework for deciding whether to renew, renegotiate, or replace a software vendor at contract renewal. The decision framework should score: value delivered in the past contract period (usage, outcomes, support quality), cost competitiveness (is the price still market-rate?), strategic fit (does this vendor still serve our strategy?), risk profile (any new security, financial, or compliance concerns?), and switching cost (how painful and expensive is migration?). Include a decision matrix and minimum score thresholds for automatic renewal vs. mandatory renegotiation vs. competitive RFP.

### #0522 — Vendor SLA Penalty Enforcement Guide

Write the guide for enforcing SLA penalties when a vendor consistently misses performance commitments. The guide should cover: how to document SLA misses (specific, dated, with reference to the contract clause), the escalation process (account manager → director → executive), how to calculate and formally claim service credits, when to put the vendor on formal notice of breach, the evidence standard required to invoke termination clauses, and how to manage the vendor relationship through an enforcement action without destroying it. Include template language for the formal notice letter.

### #0523 — Procurement KPI Dashboard

Design the quarterly procurement KPI dashboard for the CFO. Metrics to track: cost savings achieved (vs. prior period and vs. benchmark), purchase order compliance rate (% of purchases with PO before invoice), contract coverage (% of spend under active contracts), vendor concentration (% of spend in top 10 vendors), on-time payment rate, average contract cycle time, vendor risk ratings distribution, and maverick spend (% of spend outside procurement-approved vendors). For each metric, include the current value, the target, and the traffic light status.

### #0524 — Global Procurement Policy

Write the global procurement policy for a multinational company. The policy should cover: procurement thresholds (what can be purchased without formal approval vs. what requires a PO vs. what requires a competitive bid), approval authority matrix (who can approve what amount), supplier selection requirements (minimum number of quotes at each threshold), contract requirements (when must a formal contract be used vs. purchase order only), preferred supplier programs, prohibited procurement practices (conflict of interest, kickbacks), and the policy enforcement mechanism. Make it practical for a global company with teams in 12 countries.

### #0525 — Vendor Consolidation Business Case

Write the business case for consolidating 15 separate marketing technology vendors into 3. The current stack costs \$2.4M annually, has significant data integration problems, and requires a dedicated FTE just to manage the tools. The business case should: quantify the total cost of the current state (licenses + integration + management time), model the cost of the consolidated state, estimate the one-time migration cost, calculate the 3-year NPV of consolidation, and identify the key risks (data migration, capability gaps, change management). Recommend whether to proceed.

### #0526 — Outsourcing Decision Framework

Write the decision framework for evaluating whether to outsource a business function. The company is evaluating outsourcing its IT helpdesk (currently 12 internal FTEs). The framework should score: cost comparison (total cost of internal vs. outsourced), quality comparison (current SLA vs. typical outsourced SLA), strategic importance (is this a core competency?), knowledge risk (how much institutional knowledge would be lost?), reversibility (how easy is it to insource later?), and employee impact. Apply the framework to the IT helpdesk scenario and make a recommendation.

### #0527 — Supplier Audit Protocol

Design the annual supplier audit protocol for critical vendors. The audit should cover: financial stability check (reviewing publicly available financial data or requesting financials for private vendors), operational capability assessment (capacity to meet our forecast demand), security posture review (updating security questionnaire, reviewing any incidents in the past year), contract compliance review (are they meeting contractual obligations?), and ESG assessment (do they meet our supplier code of conduct?). Define the risk tiers (which vendors are audited annually vs. every 3 years), the audit team composition, and the escalation process for audit failures.

### #0528 — Technology Asset Management Policy

Write the technology asset management policy for software licenses and SaaS subscriptions. The policy should cover: the asset register requirements (all software licenses and subscriptions must be logged), the approval process for new tool acquisition, the annual license optimization review (right-sizing licenses to actual usage), the renewal approval process, the process for off-boarding a tool (ensuring data migration, license cancellation, access revocation), and the responsibility matrix (who owns the asset register, who approves new tools, who conducts the annual review). Include the audit consequences for undisclosed SaaS tools.

### #0529 — Vendor Red Flag Assessment

You are reviewing a \$5M software vendor contract renewal. During the annual vendor review, 3 red flags emerged: (1) the vendor's support response time increased from 4 hours to 48 hours in the past 6 months, (2) their CEO and CTO both departed, and (3) they were recently acquired by a private equity firm known for cost-cutting. Write the vendor risk assessment memo recommending: whether to renew, renegotiate with enhanced protections, or begin transition to an alternative vendor. Include the specific contractual protections to require if renewing.

### #0530 — Outsourced Procurement Assessment

Write the business case for outsourcing the company's procurement function to a managed service provider. Current state: 3 internal procurement staff managing \$30M in vendor spend with limited category expertise. Outsourced option: a managed procurement provider offering category specialists across IT, marketing, and facilities, at a fixed fee of \$400K/year. Current internal cost: \$450K in salaries plus benefits. Write the make vs. buy analysis, the transition risks, the contract requirements for the outsourced provider, and the recommendation.

### #0531 — Supplier Code of Conduct

Write the supplier code of conduct for a company with 300 active suppliers. The code should cover: labor standards (no child labor, fair wages, safe working conditions), environmental standards (compliance with local environmental law, carbon reduction targets), business ethics (no bribery, accurate invoicing, conflict of interest disclosure), data security requirements for suppliers who access our systems, subcontracting requirements (approval required for use of subcontractors), audit rights, and consequences for non-compliance. Reference ILO standards and UN Global Compact principles.

### #0532 — Category Strategy: Cloud Services

Write the cloud services category strategy for a company spending \$8M annually on AWS, Google Cloud, and Azure. The strategy should: consolidate spend to maximize enterprise discounts (analyze whether single-cloud is achievable), negotiate reserved instance commitments vs. on-demand pricing, implement a cloud cost optimization program (right-sizing, scheduled shutdowns, spot instances for batch workloads), establish a FinOps function to manage ongoing cloud spend, and project the savings from the strategy (typically 25-35% of cloud spend is reclaimable). Include the negotiation leverage points with each hyperscaler.

### #0533 — Procure-to-Pay Process Improvement

Write the process improvement plan for a procure-to-pay (P2P) process that is generating internal complaints: purchases are made outside the system (maverick spend), invoices are paid late (average Days Payable Outstanding is 58 vs. 45 target), and the approval process for purchases above \$10K takes 12 days on average. Identify the root causes for each problem and propose specific process changes. Include the technology options for improving the P2P workflow and the change management plan for driving adoption.

### #0534 — IT Vendor Consolidation Analysis

The company uses 45 different software tools for project management, communication, file sharing, and productivity — many overlapping in capability. Write the IT vendor consolidation analysis. Methodology: audit all 45 tools for active users and cost, identify the overlapping use cases (3 different project management tools, 2 video conferencing tools), evaluate the Microsoft 365 consolidation option (replaces 15+ point solutions), calculate the total cost of the consolidated state, and recommend a consolidation roadmap over 12 months that minimizes disruption.

### #0535 — Vendor Financial Health Monitoring

Write the vendor financial health monitoring program for the company's top 30 strategic vendors. The program should: define the monitoring signals for each risk tier (publicly traded: quarterly earnings, credit ratings; private: revenue growth, funding rounds; startups: runway, investor changes), the review frequency (tier 1: quarterly, tier 2: semi-annually, tier 3: annually), the escalation process when a vendor shows financial distress signs, and the contingency plan template (alternative vendor identification, data portability, contract exit rights). This is especially important for vendors with no data portability.

### #0536 — SaaS Contract Negotiation Guide

Write the SaaS contract negotiation guide for non-procurement employees who are negotiating software contracts under \$50K. The guide should cover: the 5 clauses to always push back on (auto-renewal notice period, price increase caps, data portability on termination, liability cap, right to audit), the 3 things SaaS vendors always inflate in initial proposals (number of seats, term length, add-on features), the payment terms to negotiate (net 45 vs. vendor's standard net 30, annual pre-pay for best price), and the red flags in a SaaS contract that require legal review before signing.

### #0537 — Procurement Talent Development Plan

Write the talent development plan for a 5-person procurement team. The team's current skills are strong in tactical purchasing but weak in: strategic sourcing, category management, supplier relationship management, and data analytics. The development plan should: identify the skill gaps with specificity, map each team member's current skills and development areas, design the learning program (external certifications, internal mentoring, stretch assignments), set measurable milestones at 6 and 12 months, and project the business impact of the skill improvement (better contracts, better vendor relationships, more savings).

### #0538 — API Integration Contract Provisions

Write the contract provisions for a SaaS agreement where the vendor will provide API access to their platform. The provisions should cover: API uptime SLA (separate from overall platform SLA — APIs often have different availability), rate limiting (maximum API calls per minute/hour and what happens when limits are exceeded), versioning and deprecation policy (minimum notice period before deprecating an API endpoint), API documentation obligations, security requirements for API access, and data format standards. These provisions protect the company's investment in API integrations if the vendor changes their API.

### #0539 — Software License Optimization

You are the IT procurement lead. Write the software license optimization analysis for a 500-person company spending \$2.8M on software annually. Steps: pull license counts vs. active users for all tools over \$50K, identify underutilized licenses (usage below 70% = candidate for reduction), calculate the annual savings from right-sizing each tool, and rank the top 5 savings opportunities. Typical finding: 25-30% of SaaS spend is wasted on unused licenses. Write the findings report and the vendor renegotiation approach for the top 2 opportunities.

### #0540 — Procurement Policy Update

Write the procurement policy update memo following 3 incidents last quarter: (1) a manager signed a 3-year SaaS contract without procurement review (cost: \$180K commitment, \$40K overpay vs. market), (2) an employee expensed a \$12K software purchase outside the PO process, (3) a vendor was paid \$25K without a signed contract. The policy update should address each incident specifically and include: the approval authority matrix update, the consequences for policy violation, and the communication plan for all department heads.

### #0541 — Reverse Auction Design

Design the reverse auction process for commoditized spend categories (facilities services, temp staffing, office supplies). In a reverse auction, vendors bid against each other in real time, driving the price down. The design should cover: the criteria for which categories are suitable for reverse auction (commodity, multiple qualified vendors, specification is clear), the technology platform, the pre-qualification of vendors, the reserve price concept, and how to evaluate bids that differ on price and quality. Include the communication strategy with vendors to maintain relationships post-auction.

### #0542 — Strategic Sourcing: Marketing Category

Write the strategic sourcing analysis for the marketing spend category (\$4.5M annual spend across agencies, events, tools, and media). The category is fragmented: 22 different vendors across 8 sub-categories. The strategic sourcing approach should: segment spend by sub-category, identify consolidation opportunities, create a preferred vendor program for creative agencies (2-3 preferred agencies rather than 14 agencies), negotiate framework agreements with volume commitments, and set a savings target. Expected savings from marketing category strategic sourcing: 15-20%.

### #0543 — Vendor Diversity Program

Write the vendor diversity program framework. The company has a commitment to spending 10% of procurement spend with diverse suppliers (minority-owned, women-owned, veteran-owned, LGBTQ+-owned, disability-owned businesses). The program should: define the certification requirements (certifications accepted: NMSDC, WBENC, NVBDC), set the 10% target by category, report progress quarterly to the board, create a mentorship program for diverse suppliers to develop capability (some diverse suppliers are excellent qualitatively but lack scale), and design the procurement team incentive to reach the diversity target.

#### #0544 — Invoice Exception Management

Write the invoice exception management process. Current state: 18% of invoices require manual exception handling (vendor mismatch, PO mismatch, approval routing errors, coding errors) at a cost of \$15 per exception, totaling \$45K/year in processing cost. The improvement process should: categorize exception types (the 5 most common), address the root cause of each type (PO mismatch usually indicates a supplier invoicing the wrong entity — fix the vendor master data), set a target of reducing exceptions to 8%, and calculate the savings from exception reduction.

#### #0545 — Tail Spend Management Program

Write the tail spend management program. Tail spend is the 80% of purchase transactions that account for only 20% of spend — small, infrequent, hard to manage. Current state: the company processes 4,000 purchase transactions under \$5,000/year at a cost of \$50 per transaction, totaling \$200K in processing cost. The program should: implement a purchasing card (P-card) program for low-value purchases, establish a vetted supplier marketplace for common categories, and automate approval routing for routine purchases. Expected savings: \$120K/year in processing cost plus 5-10% savings on the spend itself.

#### #0546 — Insourcing vs. Outsourcing Framework

Write the insourcing vs. outsourcing decision framework for professional services. The company currently outsources IT support, payroll, legal, accounting, and facilities management. As the company grows, some outsourced services may be more cost-effective to bring in-house. The framework should: set the evaluation trigger (when a service category reaches \$X spend, evaluate insourcing), the comparison criteria (total cost, quality, flexibility, strategic importance, capability building), the transition risk assessment, and the post-insourcing performance monitoring. Include a worked example using the IT support category.

#### #0547 — Contract Clause Library

Build the contract clause library for the procurement team. The library contains pre-approved, legally reviewed standard clauses that can be inserted into contracts without legal review, accelerating the contracting process. Include clauses for: data processing addendum (GDPR standard), termination for convenience (90-day notice, no penalty), price increase cap (CPI + 2% maximum annual increase), audit rights (right to audit vendor's books with 30-day notice), source code escrow (for critical software), warranty and indemnification (standard positions), and limitation of liability (cap at 12 months of fees). Each clause should have a note explaining when to use it and when to escalate to legal.

#### #0548 — Supplier Innovation Program

Design the supplier innovation program. The best suppliers have ideas that can improve the company's products and processes — but most companies never tap this source of innovation. The program should: invite top 20 strategic suppliers to submit innovation proposals annually, establish an evaluation process (cross-functional review committee), fund 3-5 pilot projects per year (\$50K per pilot), track the revenue or cost savings generated from supplier innovation, and recognize suppliers publicly for innovations adopted. Include the proposal template and the evaluation criteria.

#### #0549 — Payment Terms Optimization

Write the payment terms optimization strategy. Current terms: Net 30 for all vendors. Proposed strategy: (1) extend to Net 60 for vendors with strong financial health (net interest benefit to the company: \$400K/year on \$24M AP), (2) offer early payment discounts (2% Net 10) for strategic vendors who offer them (savings on \$5M eligible spend: \$100K/year), (3) maintain Net 30 for small vendors and diverse suppliers where extended terms create cash flow hardship. Write the vendor segmentation criteria, the negotiation approach, and the DPO (Days Payable Outstanding) improvement projection.

### #0550 — Procurement Savings Tracking

Write the procurement savings tracking methodology. Savings reporting is controversial: the CFO wants to see savings hit the P&L, but procurement often claims savings that don't flow through. The methodology should: define 4 categories of savings (hard savings: actual P&L; impact; soft savings: cost avoidance; efficiency savings: process cost reduction; value creation: quality improvement), establish the evidence standard for each category, set the governance for savings validation (finance signs off on hard savings), and create the savings reporting format for the board and CFO. Include the common disputes between procurement and finance about savings claims.

### #0551 — Emergency Procurement Protocol

Write the emergency procurement protocol for urgent situations where normal procurement process timelines (4-6 weeks) cannot be met. Examples: a critical vendor fails unexpectedly, a cybersecurity incident requires emergency response services, a natural disaster affects a key facility. The protocol should: define what constitutes an emergency (criteria, not examples), establish a streamlined approval process (CPO approval for up to \$500K without competitive bid), require post-emergency documentation (within 30 days, competitive alternatives must be documented to demonstrate the emergency was genuine), and set the audit requirement for emergency purchases.

### #0552 — Procurement KPI Scorecard

Write the procurement KPI scorecard for the quarterly review with the CFO. Metrics: total managed spend (\$X vs. target), savings achieved (\$X vs. \$Y target, with breakdown by category), procurement cycle time (days from requisition to PO issuance, target <5 days), contract compliance rate (% of spend on contract, target >85%), invoice exception rate (target <8%), supplier satisfaction score (from annual survey, target >4.0/5.0), and diversity spend (% of spend with certified diverse suppliers, target 10%). For each metric, show current, target, trend, and the story behind significant variances.

### #0553 — Green Procurement Policy

Write the green procurement policy. The company has committed to Scope 3 emissions reduction, which requires procuring from lower-emissions suppliers. The policy should: require new supplier qualification to include environmental certification (ISO 14001 or equivalent) for spend above \$100K, incorporate environmental criteria into bid evaluation (suggested weighting: 10% of total score for spend above \$250K), set a target for supplier emissions reduction (top 20 suppliers commit to science-based targets by 2027), and require annual Scope 3 emissions reporting from strategic suppliers. Include the supplier questionnaire for environmental data collection.

### #0554 — Procurement Team Talent Strategy

Write the procurement talent strategy for a 10-person procurement team that needs to evolve from transactional purchasing to strategic sourcing. Skills gaps identified: category management expertise (only 2 of 10 staff have done strategic sourcing), data analytics (none of the team can build a spend analysis), supplier relationship management (team defaults to adversarial negotiation rather than partnership), and AI literacy (no one on the team uses AI tools for market intelligence or contract analysis). Write the 12-month development plan for each skill gap.

### #0555 — Vendor Onboarding Automation

Design the vendor onboarding automation program. Current state: new vendor setup takes 20 business days due to manual processes (legal review, tax documentation, payment setup, supplier portal registration, compliance check). Target state: 5 business days for standard vendors, 10 days for high-risk vendors. The automation should: use a supplier portal for self-service document submission, automate tax ID validation and sanctions screening, create parallel workflow tracks (legal, finance, and compliance can review simultaneously rather than sequentially), and auto-generate the PO setup in the ERP upon approval. Write the workflow design and the technology requirements.

### #0556 — Procurement Risk Assessment

Write the annual procurement risk assessment for the company's supplier base. Risk dimensions for each of the top 50 suppliers: supply risk (single source? long lead times?), financial risk (private equity owned? revenue declining?), reputational risk (ESG incidents? labor violations?), concentration risk (>10% of spend with one supplier?), geopolitical risk (operations in high-risk countries?), and cybersecurity risk (the supplier has access to our systems). Score each supplier on each dimension, produce a risk-ranked supplier list, and develop mitigation plans for the top 10 highest-risk suppliers.

### #0557 — Procurement Governance Review

Write the procurement governance review process. The review ensures that the procurement function is operating within its mandate and adding measurable value. Review frequency: annual. Review scope: policy compliance (are employees following the procurement policy?), savings delivery vs. target, contract portfolio health (% of spend on current contracts, % of contracts with auto-renewing provisions that procurement missed), procurement team performance vs. KPI scorecard, and board-level procurement governance requirements. Produce the findings report and the improvement action plan for the following year.

### #0558 — Indirect Spend Management

Write the indirect spend management strategy for a company with \$15M in indirect spend (anything not in the product: IT, marketing, HR, professional services, facilities, travel). Indirect spend is typically unmanaged: each department manages its own vendors without central visibility. The strategy should: implement a spend visibility program (categorize all spend, identify the biggest categories), develop category strategies for the top 5 indirect categories (IT software, marketing agencies, professional services, facilities, travel), assign category ownership to procurement team members, and set a 2-year savings target of 12% of managed indirect spend.

### #0559 — Procurement AI Pilot

Design the procurement AI pilot program. 3 AI use cases for procurement: (1) contract analysis (AI reviews 200 contracts for non-standard clauses, reducing 3 weeks of legal work to 2 days), (2) spend analysis (AI categorizes and analyzes spend data from 3 ERP systems, enabling better category management), (3) market intelligence (AI monitors news and databases for supplier risk signals, giving procurement early warning of vendor issues). Design the 90-day pilot for use case 1 (contract analysis): the AI tool, the evaluation criteria, the pilot scope (100 contracts), and the success threshold for proceeding to full deployment.

### #0560 — Contract Renewal Management System

Design the contract renewal management system. Current state: contracts are renewed automatically because no one tracked the expiration date (the company has been paying for 3 software licenses for tools that are no longer used, total cost: \$180K/year). The system should: track all contract expiration dates with 6-month, 3-month, and 1-month advance alerts, assign contract owners (the business stakeholder who initiated the contract), require a renewal decision 90 days before expiration (renew, renegotiate, or terminate), and integrate with the procurement approval workflow so renewals go through the same process as new contracts. Write the system requirements and the governance model.

### #0561 — Procurement for International Operations

Write the international procurement guide for a company opening offices in 3 new countries. Each country has different procurement requirements: import duties and customs (varies by country and product type), preferred local supplier requirements (some governments require a % of local sourcing), payment currency and method requirements (some countries require local bank accounts and payment in local currency), and local labor laws affecting staffing agency procurement. Write the country-specific procurement requirements for UK, India, and Brazil and the governance model for international procurement.

### #0562 — Supplier Relationship Management Tiers

Write the supplier relationship management (SRM) tiering model. Not all suppliers deserve the same relationship investment. Tier 1 (Strategic Partners, 5-10 suppliers): joint business planning, executive relationship, quarterly reviews, innovation collaboration. Tier 2 (Preferred Suppliers, 20-30 suppliers): annual reviews, preferred pricing arrangements, standard SLA management. Tier 3 (Approved Suppliers, remaining): transactional relationship, catalog ordering, automated payment. Write the criteria for placing suppliers in each tier, the relationship investment for each tier, and the criteria for moving suppliers between tiers.

### #0563 — Spend Analytics Implementation

Write the spend analytics implementation plan. Current state: the company cannot answer basic questions about its own spending ('How much do we spend with Vendor X across all departments?') because spend data is fragmented across 3 systems (ERP, corporate credit card, employee expenses). The implementation should: integrate the 3 data sources, clean and categorize spend data (using UNSPSC or a custom taxonomy), build the spend analytics dashboard (total spend by category, vendor, department, period), and train the procurement team on using spend analytics for sourcing decisions. Timeline: 90 days. Tool options: Coupa, Jaggaer, or a Power BI custom build.

### #0564 — Third-Party Risk Management

Write the third-party risk management program. Third-party risk has become a board-level concern: several high-profile data breaches and supply chain failures have been caused by vendors, not the companies themselves. The program should: tier vendors by risk level (Tier 1: access to sensitive data or critical operations; Tier 2: significant spend but lower risk; Tier 3: routine), conduct due diligence proportional to risk tier (Tier 1: annual security assessment, financial review, ESG audit; Tier 2: annual questionnaire; Tier 3: onboarding screening only), maintain a central risk register, and define the escalation process when a vendor's risk profile changes.

### #0565 — Catalog Management Program

Design the electronic catalog management program for indirect spend. A purchasing catalog allows employees to order pre-approved items at pre-negotiated prices without going through procurement, reducing process cost and improving compliance. The catalog should cover: office supplies (1,500 SKUs at negotiated prices), IT hardware (standard configurations), travel (approved hotels and airlines by city), and professional services (approved staffing firms). Write the catalog maintenance process (who adds and removes items?), the catalog governance (approval process for adding new items), and the compliance approach (how to prevent employees from going off-catalog for cataloged items).

### #0566 — Procurement Post-Audit

Write the procurement post-audit methodology. The post-audit reviews a major procurement decision made 2 years ago to determine whether the projected benefits were delivered. For a \$5M ERP contract: did the implementation come in on budget (projected \$2M, actual \$)? Did the projected \$1.5M/year efficiency savings materialize? Did the vendor deliver contractual SLAs? What went wrong that procurement could have anticipated? The post-audit produces findings that improve future procurement decisions. Write the methodology, the evidence collection process, and the reporting format.

### #0567 — Procure-to-Pay Metrics

Write the procure-to-pay (P2P) metrics framework. Metrics that measure the effectiveness of the end-to-end P2P process: purchase requisition cycle time (requisition to PO issuance), PO-to-invoice match rate (% of invoices that match the PO automatically), invoice processing time (invoice receipt to payment), on-time payment rate (% of invoices paid within terms), early payment discount capture rate (% of eligible discounts captured), and touchless invoice rate (% of invoices processed without human intervention). For each metric, define the calculation, the benchmark, and the improvement levers.

#### #0568 — Sustainability Procurement Scorecard

Write the sustainability procurement scorecard for the company's top 30 suppliers. For each supplier, score 5 dimensions: carbon emissions (reported? science-based target committed?), labor practices (third-party audited? no forced labor? living wage?), governance (anti-bribery certification? diversity in leadership?), environmental management (ISO 14001? waste reduction target?), and product/service sustainability (life cycle assessment conducted? circular economy practices?). Score each dimension 0-3. Present the scorecard to the board's ESG committee with remediation plans for suppliers with low scores.

#### #0569 — Category Strategy for Professional Services

Write the category strategy for professional services spend (\$6M annual). The company uses external consultants for strategy, IT, HR, and legal work. The strategy should: define the approved vendor list for each sub-category, set the rate card by consultant level (partner: \$350/hr, director: \$250/hr, senior: \$175/hr, analyst: \$100/hr), implement a statement of work template to prevent scope creep, require weekly time and expense reporting, and establish a total relationship review every 6 months. Target: 15% cost reduction through consolidation and rate discipline.

#### #0570 — Vendor Credit Worthiness Check

Write the vendor creditworthiness check process for new vendors seeking net-60 payment terms. Before extending payment terms, the company should verify: the vendor's financial stability (D&B; credit report), their operating history (minimum 3 years in business), references from 2 other customers, their insurance coverage (certificate of insurance required), and their bank information (verified payment details before first payment). Write the process, the documentation required, and the decision matrix (when to approve net-60 vs. require prepayment).

#### #0571 — Procurement Transformation Roadmap

Write the procurement transformation roadmap for a 5-year journey from reactive purchasing to strategic procurement. Year 1: visibility (spend analysis, policy foundation, ERP clean-up). Year 2: control (strategic sourcing for top categories, contract compliance program, PO process adherence). Year 3: efficiency (P2P automation, supplier portal, catalog management). Year 4: value creation (supplier innovation program, total cost of ownership focus, sustainability integration). Year 5: strategic partnership (vendor co-investment, shared risk models, procurement as competitive advantage). Write the milestones, the investment, and the savings trajectory for each year.

#### #0572 — Software Asset Management Program

Write the software asset management (SAM) program. The company has 250 software licenses across 60 different tools with no central tracking. The SAM program should: create a software asset inventory (all licenses, costs, usage, and renewal dates), implement a license harvesting process (reclaim unused licenses automatically), establish a software governance board (approve new software requests, prevent shadow IT), integrate with the IT service management system (license request → procurement → provisioning → tracking), and produce a monthly license utilization report. Expected savings: 20% of current software spend (\$280K/year).

#### #0573 — Vendor Performance Improvement Plan

Write the vendor performance improvement plan (PIP) for a strategic vendor who has missed SLAs for 3 consecutive months. The PIP should: document the specific SLA misses (dates, metrics, impact on the company), state the performance expectations going forward (the SLA requirements with no ambiguity), define the improvement timeline (60 days to demonstrate consistent improvement), establish the monitoring process (weekly performance check-in with the vendor's operations lead), specify the consequences of non-improvement (contract termination trigger), and require the vendor to provide a root cause analysis and remediation plan within 10 business days.

#### #0574 — Indirect Procurement Technology Selection

Write the technology selection process for a \$300K indirect procurement platform investment. The company is evaluating Coupa, SAP Ariba, Ivalua, and Jaggaer. Evaluation criteria: P2P workflow coverage (requisition to payment), supplier management capabilities, catalog and e-procurement, analytics and reporting, integration with our ERP (Oracle NetSuite), implementation complexity, total cost of ownership over 5 years, and vendor reference quality. Write the RFP structure, the demo scenario (5 real use cases from our business), the scoring rubric, and the decision governance process.

#### #0575 — Contract Obligation Tracking

Write the contract obligation tracking system design. Every contract creates obligations — on the company and on the vendor. These obligations are often forgotten after contract signing. The tracking system should: extract obligations from every new contract (delivery dates, SLA requirements, reporting obligations, renewal notice deadlines, spend commitments), assign an obligation owner for each obligation, set automated reminders at the obligation due date, track compliance with the company's obligations (if we have reporting obligations, are we meeting them?), and produce a monthly 'obligation at risk' report. Write the system requirements and the governance model.

#### #0576 — Procurement Budget Management

Write the procurement budget management methodology for managing \$50M in managed spend against a \$42M budget target. When managed spend exceeds budget, the procurement team must: identify the overspend by category (which categories are running over budget?), determine the cause (price increases, volume increases, unplanned purchases, or scope expansion?), develop a corrective action for each overspend category (renegotiation, volume reduction, or budget reallocation), and report monthly to the CFO. Write the monthly procurement budget report format and the CFO escalation threshold.

#### #0577 — Contingency Contract Strategy

Write the contingency contract strategy for critical services where the primary vendor failure would cause business disruption. For each of the top 5 critical vendors (cloud hosting, payment processing, customer support platform, identity and access management, and data backup), define: the contingency plan (backup vendor identified, contracts in place or not), the time required to activate the contingency, the data portability situation (can we move our data quickly?), and the test requirement (contingency plans must be tested annually). Write the contingency plan template.

#### #0578 — Procurement Fraud Prevention

Write the procurement fraud prevention framework. Procurement fraud (kickbacks, bid rigging, invoice fraud, vendor favoritism) is common and hard to detect. The prevention framework should: implement vendor payment controls (dual approval for new vendors and bank account changes), conduct periodic vendor master data audits (identify duplicate vendors, unusual payment patterns), require independent review of RFPs above \$100K (the business unit that will use the vendor should not control the selection process), implement a procurement fraud hotline (anonymous reporting), and conduct fraud awareness training for all procurement team members annually. Write the red flag checklist for common fraud indicators.

#### #0579 — Procurement Ethics Policy

Write the procurement ethics policy. The policy should cover: acceptance of gifts and hospitality (maximum value: \$50 per instance, \$150 per year per vendor — vendor entertainment must be disclosed), conflict of interest disclosure (employees must disclose any personal relationship with a vendor), post-employment restrictions (employees leaving to join a vendor company must notify HR — 6-month cooling off period for vendors they managed), and the investigation process for procurement ethics violations. Write the policy, the disclosure form, and the consequence framework.

### #0580 — Source-to-Pay Process Design

Write the source-to-pay (S2P) process design for a company implementing procurement for the first time. The S2P process covers: (1) Need identification and approval (who can request what?), (2) Sourcing (how do we find and evaluate suppliers?), (3) Contracting (how do we negotiate and execute contracts?), (4) Purchase order issuance (how do we authorize spending?), (5) Receipt and acceptance (how do we confirm delivery?), (6) Invoice processing (how do we match and approve invoices?), (7) Payment (how and when do we pay?). Write the process narrative, the roles and responsibilities for each step, and the technology needed for each step.

### #0581 — Vendor Master Data Management

Write the vendor master data management policy. Vendor master data (vendor names, addresses, bank accounts, tax IDs) is a critical control point for payment fraud. The policy should: require dual authorization for adding new vendors, require dual authorization for changing bank account details, implement a quarterly vendor master data audit (identify dormant vendors, duplicate vendors, vendors without tax IDs), restrict vendor master data editing to a defined group (Accounts Payable only, not the business units that use the vendor), and define the review process for vendor reactivation (dormant vendors must be re-vetted before reactivation).

### #0582 — Procurement KPI Targets for Next Year

Write the procurement KPI targets for the next fiscal year, with the improvement rationale for each target. Current vs. target: Managed spend coverage (75% → 85% — more of the company's spending is under procurement management), Savings vs. target (92% → 100% — close the gap by category), Contract compliance rate (80% → 90% — reduce maverick spend), Procurement cycle time for POs (7 days → 4 days — process improvement), Invoice exception rate (15% → 8% — data quality and process improvement), and Supplier satisfaction score (3.8 → 4.2 — improve vendor relationship management). Write the action plan for reaching each target.

### #0583 — Procurement Policy Exception Management

Write the procurement policy exception management process. Sometimes the standard procurement process cannot be followed (emergency, competitive sensitivity, sole source). The exception process should: require a written exception request (who is requesting, why the policy cannot be followed, and the business risk of not proceeding), review exceptions above \$50K at the CPO level, track all exceptions in a monthly log, identify exception patterns (frequent exceptions from the same department signal a process design problem, not an exception problem), and present exception trends to the CFO quarterly.

### #0584 — Category Management Training

Write the category management training program for the procurement team. Category management is the strategic approach to managing a group of related spend categories as a business unit, not just processing purchases. The training should cover: category analysis (how to build a spend, supplier, and market analysis for a category), category strategy development (how to develop a strategy that creates value beyond price), stakeholder management (how to engage business unit stakeholders in category strategy), supplier relationship management (how to manage suppliers as partners, not just vendors), and negotiation excellence (how to negotiate value, not just price). Duration: 2-day workshop plus 6-month coaching program.

### #0585 — Procurement Value Creation Report

Write the annual procurement value creation report for the board. The report should go beyond savings to capture the full value created by procurement: hard savings (price reductions and cost avoidance — quantified), risk mitigation value (supplier failures prevented or managed — estimated), innovation value (supplier-contributed innovations adopted — tracked), sustainability value (ESG improvements in the supply chain), and partnership value (strategic supplier relationships that improve the company's competitive position). Write the value framework and the measurement methodology for each value type.

### #0586 — Procurement Operating Model

Write the procurement operating model for a company transitioning from decentralized to centralized procurement. Current state: each department manages its own vendor relationships and contracts, resulting in duplicated effort and inconsistent terms. Proposed model: centralized center of expertise for strategic sourcing and contract management, embedded category managers in each business unit for tactical support, and a self-service procurement portal for routine purchases. Write the organizational design, the change management plan, and the efficiency savings model.

### #0587 — Vendor Communication Protocol

Write the vendor communication protocol for all supplier-facing communication. The protocol should: define who can communicate with vendors (procurement team for commercial discussions, relevant functional team for operational discussions, legal for disputes), the documentation requirement (all significant vendor conversations documented in the vendor management system), the escalation process (when do vendor communications need to escalate to VP or CPO level?), the communication standards (professional, respectful, without creating unauthorized commitments), and the data sharing restrictions (no financial projections, headcount plans, or M&A; information to vendors).

### #0588 — Category Maturity Assessment

Write the category maturity assessment tool. For each spend category, assess maturity on 5 dimensions: Visibility (do we know what we're spending?), Strategy (do we have a documented category strategy?), Supplier Management (are we managing supplier relationships or just processing transactions?), Contract Management (do we have current, compliant contracts?), and Performance Measurement (do we track category KPIs?). Score each dimension 1-5. Categories scoring below 3 average need investment. Categories scoring above 4 average are mature and should be maintained. Write the assessment tool and the improvement roadmap.

### #0589 — Procurement Innovation Award

Write the annual procurement innovation award program. The program recognizes procurement team members who have: created significant new value beyond traditional cost savings, introduced a new sourcing approach or technology, strengthened a strategic supplier relationship in a way that delivered business value, or pioneered a sustainable procurement practice. Write the award criteria, the nomination process, the evaluation rubric, and the recognition format. The award should be presented at a company leadership event to elevate procurement's visibility.

### #0590 — Supplier Code of Conduct Training

Write the supplier code of conduct training program for 50 strategic suppliers. The training ensures that suppliers understand and commit to the company's ethical, labor, and environmental standards. Format: 2-hour online training module, available in English, Spanish, and Mandarin. Content: overview of the code of conduct, case studies illustrating each standard, the reporting mechanism for violations, and the certification requirement (suppliers must certify completion and compliance annually). Write the training outline, the assessment questions, and the supplier certification letter.

### #0591 — Procurement Risk Early Warning System

Write the procurement risk early warning system. The system monitors for risk signals across the supplier base and alerts procurement proactively. Signals monitored: news alerts (supplier mentioned in negative news stories), financial data changes (private suppliers: revenue estimate drops; public suppliers: earnings misses, stock price declines), Dun & Bradstreet credit score changes, regulatory filings (litigation, enforcement actions), cybersecurity alerts (supplier mentioned in breach databases), and social media alerts (labor disputes, environmental violations). Define the monitoring technology, the alert threshold, and the response protocol for each signal type.

## SECTION 06

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87 unique prompts for senior executives

#### #0592 — Executive Escalation Response — CREATE Format

Context: You are the VP of Customer Success. A Fortune 500 customer (\$2.4M ACV) sent an email to your CEO at 11pm saying they are 'seriously reconsidering the relationship' after 3 months of product issues and 2 missed SLA commitments. The CEO has forwarded it to you with one word: 'Fix this.' Request: Write two communications: (1) the immediate acknowledgment email from you to the customer (send within 1 hour), and (2) the formal escalation response letter from the CEO to be sent tomorrow. The customer wants: someone to own the problem, a root cause explanation, a specific remediation plan, and a gesture that acknowledges the impact on their business. Adjustments: Do not admit legal liability. Do not blame the customer for anything (even if some issues were partly their fault). Do not make promises you cannot keep. The commercial gesture should be discussed with Finance before the letter is finalized — use a placeholder. Tone: Communication 1: urgent, empathetic, action-oriented. Communication 2: executive-level, apologetic without being groveling, solution-focused.

#### #0593 — Renewal Conversation Playbook — One-Shot

You have a \$600K annual contract renewal in 30 days. The customer's NPS score last quarter was 28 (low). They have been quiet — not actively churning, but not expanding either. Write the renewal conversation playbook for the CSM. Renewal conversation structure example: 'Opening (5 min): Acknowledge the year and create a forward-looking frame. Do NOT open with 'So, renewal...!' Value Recap (10 min): Share 3 specific, quantified outcomes this customer achieved with the product. Use data from their account. Honest Health Check (10 min): 'I want to be direct with you — I know the past 6 months have been challenging. Specifically X and Y. Here is what we have done about that...' Future State (10 min): What are their goals for the next year? How does the product support those goals? Commercial Conversation (10 min): Present renewal terms. Do not lead with price — lead with value, then price. Close (5 min): Get to a clear next step — not 'I'll think about it!' Write the full playbook for this specific renewal scenario.

#### #0594 — Customer QBR Preparation Guide — Few-Shot

Write the preparation guide for a Quarterly Business Review (QBR) with a strategic customer (\$1.2M ACV, 24 months in, NRR 108%). Examples of QBR preparations that result in expansion vs. those that don't: Strong QBR preparation: 'Three weeks before, pull the customer's actual usage data and find 2-3 specific wins you can put a dollar figure on. If they reduced manual reporting time from 8 hours to 45 minutes, calculate the FTE savings. If their team closed deals 15% faster because of the integration, quantify the revenue impact. Customers remember data, not demos.' Weak QBR preparation: 'Prepare slides with product updates and roadmap. Practice the demo. Send the agenda 24 hours before.' Strong QBR structure: 'Open with: We want to make this YOUR meeting. We've prepared a 15-minute company update, but we want 45 minutes to hear about YOUR priorities for the next 6 months so we can make sure we're aligned. This inverts the typical vendor dynamic.' Weak QBR structure: 'We present for 45 minutes, then ask if they have questions.' Now write the complete QBR preparation guide for the customer described above.

#### #0595 — NPS Recovery Campaign — Chain-of-Thought

Our NPS dropped from 52 to 34 in one quarter following a difficult product release. I need to design an NPS recovery campaign. Walk me through how to approach this step by step. Step 1: Diagnose before acting. What do I need to understand before designing the campaign? Step 2: Segment the response. Not all detractors are the same — how do I prioritize who to reach out to first? Step 3: The direct outreach. What does the ideal outreach to a detractor look like? What should I NOT say? Step 4: The systemic fix. NPS campaigns fail if the product issues aren't resolved. How do I communicate the product fixes in a way that rebuilds trust? Step 5: Measurement. How do I measure whether the campaign is working before I run the next NPS survey? Step 6: Prevention. What governance change prevents this from happening again? Work through each step, then give me a 60-day NPS recovery plan.

### #0596 — Churn Post-Mortem Analysis — Role-Based

Act as an experienced Chief Customer Officer who has led CS teams at 3 hypergrowth SaaS companies. A \$450K ACV customer just churned. The customer was with us for 2.5 years, their NRR was 110% in year 1, but they declined a renewal offer this month. I have these data points: last 3 QBR recordings, the last 12 months of support tickets (22 tickets, 4 categorized as critical), their product usage data (active users dropped from 45 to 12 over 6 months), and the exit interview notes (mentioned 'the product stopped keeping up with our needs' and 'we felt like a small fish'). Analyze this churn case. Give me: 1. The real reason they churned (probably not the stated reason) 2. The earliest signal that should have triggered intervention — and when it appeared 3. What actions at each 3-month interval could have prevented the churn 4. What the CSM did wrong and what was outside their control 5. The systemic change this churn suggests we should make to our CS model

### #0597 — Launch Announcement Email Series

Write a 3-email launch announcement series for a new AI feature: an AI assistant that automatically drafts renewal proposals for the sales team. Email 1 (to customers, 2 weeks before launch): tease the feature, build anticipation, highlight the problem it solves. Email 2 (to customers, launch day): full announcement with how-to-access, key benefits, and a short video CTA. Email 3 (to customers, 3 weeks after launch): success stories from early adopters, invite non-users to a live demo. Each email: max 200 words, clear CTA, warm but professional tone.

### #0598 — Executive Sponsor Program Design

Design an executive sponsor program where your C-suite leaders build relationships with your top 25 customers. For each executive: the customer assigned (by industry fit and relationship potential), the expected touchpoints per quarter (minimum: 1 call, 1 in-person when possible), what the executive sponsors should and should not do (not troubleshoot — that is the CSM's job), how to brief executives before customer interactions, and how to measure the program's impact on retention and expansion. Include a briefing template for executive prep calls.

### #0599 — Customer Health Score Design

Design a customer health score model for a B2B SaaS company with 500 enterprise customers. The health score should be a composite of: product engagement (frequency of login, feature adoption, active users vs. licensed seats), support signals (ticket volume, ticket severity, time to resolution), relationship signals (QBR completion rate, executive sponsor relationship, NPS score), commercial signals (time since last expansion, days overdue on invoice, renewal date proximity), and strategic signals (customer growth trajectory, industry health). Weight each category, define the data sources, and create the Red/Amber/Green thresholds with the trigger actions for each.

### #0600 — Pricing Objection Handling Playbook

Write the pricing objection handling playbook for the sales team. Cover the 7 most common pricing objections and for each: the likely real concern behind the stated objection, the ideal response with the specific language to use, what NOT to say, and when to escalate to leadership or commercial exceptions. Objections to cover: 'Too expensive vs. competitor X', 'We need a bigger discount to get budget approval', 'Can you do a pilot at a lower rate first?', 'We need 30-day termination clauses', 'We're a startup — can we get startup pricing?', 'We'll pay when we see ROI', 'Your competitor offered the same thing for 40% less.'

### #0601 — Enterprise Sales Discovery Call Guide

Write the enterprise sales discovery call guide for a first call with a CIO or VP of Engineering at a Fortune 500 company. The call is 30 minutes. Guide structure: opening (build rapport, set agenda, establish credibility without arrogance — 5 min), situation questions (understand current state — 10 min with 6 specific questions), implication questions (explore the impact of the problem — 8 min with 5 specific questions), value questions (paint the future state — 5 min), next step close (never leave without a committed next step — 2 min). Include the specific questions, not just the categories.

### #0602 — Executive Sponsor Briefing

Write the briefing document for an executive sponsor who is meeting with a strategic customer for the first time. The customer is a \$1.8M ACV account that expanded 3 times in 3 years but has been flat for 18 months. The executive sponsor is the CRO, and the customer contact is the EVP of Operations. The briefing should cover: relationship history, product usage summary, the last 3 QBR themes, the customer's stated strategic priorities, the business outcomes they care about most, 3 conversation starters that would resonate with an EVP of Operations, and the one ask from this meeting (not a sales ask — a strategic insight ask).

### #0603 — Churn Risk Intervention Playbook

Write the churn risk intervention playbook for a customer showing the following red flags: active users dropped from 40 to 8 in 4 months, 3 unresolved support tickets over 30 days old, the champion left the company 6 weeks ago, and the renewal is in 90 days. The playbook should: define the urgency level (this is a Code Red), the escalation required (CSM → VP CS → CEO sponsor), the first 48-hour intervention (what to do immediately), the 30-day recovery plan (what wins are needed before the renewal conversation), the renewal conversation strategy (not leading with price — leading with future value), and the go/no-go criteria for commercial concessions.

### #0604 — Product Feedback to Product Team

Write the guide for CSMs on how to effectively communicate customer feedback to the product team. The guide should prevent the common failure: CSMs sending 'customers want X' messages with no context. The guide should cover: the format for submitting product feedback (problem statement, customer context, frequency, business impact), how to prioritize which feedback to escalate, the expected response SLA from the product team, what to tell customers while their request is in the product backlog, and how to close the loop when their request ships. Include the product feedback form template.

### #0605 — Customer Community Strategy

Design the customer community strategy for a \$100M ARR B2B SaaS company. The community should drive: peer learning (customers helping each other reduces support burden), product advocacy (happy customers become case study subjects and references), product feedback (structured input into the product roadmap), and expansion (community members are more likely to expand and less likely to churn). The strategy should cover: platform selection, content strategy (what the company produces vs. what the community produces), moderation approach, success metrics (engagement rate, support deflection, NPS correlation), and the community manager role.

### #0606 — Win/Loss Analysis Program

Design a win/loss analysis program for a B2B sales team. The program should: define which deals are analyzed (all losses over \$50K, all wins over \$100K, random sample of smaller deals), who conducts the interview (independent party, not the AE who worked the deal), the interview guide (10 questions covering: why they chose us or the competitor, the decision process, what moved them forward, what almost stopped them, what we could have done better), how findings are synthesized monthly, and how insights change sales plays, messaging, and product priorities. Include the win/loss interview guide.

### #0607 — Customer Advisory Board Setup

Design the customer advisory board (CAB) for a \$70M ARR enterprise SaaS company. The CAB should: include 8-12 customers (how to select them: strategic accounts, product evangelists, one churned customer for unfiltered feedback), meet twice per year (agenda: product roadmap preview, strategic discussion, small group sessions by use case), have an executive sponsor on the vendor side (the CEO or CPO), produce specific outputs (product feedback that goes directly into the roadmap, 2-3 new case studies per year, peer-to-peer introductions between customers). Include the invitation letter, the agenda template, and the follow-up process.

### #0608 — Sales Enablement Onboarding Plan

Write the 90-day sales enablement onboarding plan for a new enterprise Account Executive. Day 1-30: product knowledge (pass product certification), competitive knowledge (understand the top 5 competitors cold), customer knowledge (shadow 5 customer calls, read 10 case studies), company knowledge (understand the sales process, CRM hygiene requirements, forecasting methodology). Day 31-60: run first solo discovery call (with manager observation), build first territory account map, deliver product demo (with SE support). Day 61-90: run first full sales cycle independently, close or progress first deal, hit pipeline coverage target. Include pass/fail criteria for each phase.

### #0609 — Customer Segmentation Strategy

Write the customer segmentation strategy for a 500-account enterprise customer base. The segmentation should go beyond revenue tiers to include: health score, growth potential (is the customer growing their own business?), strategic value (reference-ability, co-innovation potential), and product maturity (how deeply are they using the product?). Define 4 segments: Strategic (high value, high health, high growth — white-glove treatment), Growth (currently small but high growth potential — investment tier), Core (stable, healthy, majority of customers — self-service with light touch), and At-Risk (low health, potential churn — intervention required). Describe the service model and resource allocation for each segment.

### #0610 — Reference Program Design

Design the customer reference program. The program should: build a pool of 30+ willing reference customers across industries and use cases, manage reference requests without burning out the same 5 customers, create different reference types (call reference, site visit, case study, analyst briefing), compensate or recognize reference customers for their time (not financially — think early access, executive access, conference invitations), track reference usage and customer satisfaction with the program, and ensure reference customers feel their time is valued and their feedback shapes the product. Include the reference request triage process.

### #0611 — Customer Success Playbook for Scale

Write the customer success playbook for a 'tech-touch' customer segment (customers too small for dedicated CSMs). The playbook should cover: the onboarding email sequence (automated but personalized with product usage data), the in-app success messaging (triggered by usage milestones and risk signals), the automated health check outreach (when a customer's usage drops, trigger an automated intervention), the community and self-service resources that replace 1:1 CSM time, the criteria for escalating a tech-touch customer to human intervention, and the annual renewal process (automated renewal vs. human-assisted). This playbook supports 200+ accounts with 1 CSM equivalent.

### #0612 — Win-Back Campaign for Churned Customers

Write the win-back campaign for 25 customers who churned in the past 6 months with total ARR of \$1.8M. The campaign should: segment churned customers by reason (product gaps now closed vs. went to competitor vs. budget cuts), tailor the win-back message to each segment, define the commercial offer (trial extension, pricing adjustment, implementation support), design the outreach sequence (email 1 → call → email 2 → executive outreach if needed), set realistic success targets (win-back rate of 10-15% is typical), and define the measurement and timeline (3-month campaign).

### #0613 — Customer Journey Map for Enterprise

Create the enterprise customer journey map from first contact to advocacy. Stages: Awareness (how they discover us), Evaluation (trial, reference calls, RFP), Purchase (negotiation and contracting), Onboarding (implementation, training, first value), Adoption (expansion of usage, success milestones), Renewal (renewal conversation and decision), Expansion (upsell and cross-sell), and Advocacy (case study, reference, community). For each stage, describe: the customer's goal, their concerns, the company's touchpoints, the success metric, and the most common failure point.

#### #0614 — Escalation Management Protocol

Write the escalation management protocol for a B2B SaaS company. Define the 4 escalation levels: Level 1 (CSM handles independently), Level 2 (CSM + VP CS within 4 hours), Level 3 (CEO or CRO intervention + executive sponsor within 24 hours), Level 4 (Board-level account — CEO + Board member). For each level, specify: the criteria that triggers escalation, the response time commitment, who owns the account during the escalation, the communication cadence to the customer, and the de-escalation criteria. Include the internal communication template for each escalation level.

#### #0615 — Customer Interview Guide for Product Research

Write the customer interview guide for understanding why customers choose to expand their contract vs. remain at the same spending level. The interview should: build rapport quickly (customer is giving their time), avoid leading questions (don't suggest answers), explore the customer's business goals (not just their feature requests), understand the value drivers that matter most to them, and uncover the internal processes that govern a decision to expand spend. Include 12 questions with branching follow-up prompts. This is a research interview, not a sales call — the goal is insight, not conversion.

#### #0616 — At-Risk Customer Playbook

Write the playbook for managing an at-risk customer flagged by the health score algorithm. The playbook should have 5 stages: Detect (automated health score threshold triggers CSM alert), Assess (CSM reviews usage data, support history, NPS, last QBR notes — 30 minutes to diagnose), Plan (CSM creates 30-day intervention plan with specific actions), Execute (outreach, value conversation, product support, executive engagement if needed), and Resolve (either health score recovers to Green or risk is escalated to churn prevention protocol). Include the assessment checklist and the intervention plan template.

#### #0617 — Expansion Revenue Playbook

Write the expansion revenue playbook for a \$1.2M ACV customer who has been with the company for 3 years and is using the product for one department. The expansion opportunity is deploying the product to 3 additional departments. The playbook should: define the trigger (customer health is Green, 3-year anniversary is a natural review point), the stakeholder map (champion in Department A, economic buyer is CFO, new stakeholders in Departments B, C, D), the approach (business case for expansion built from Department A ROI data), the executive meeting agenda, and the commercial strategy (multi-year deal, volume pricing, implementation support included).

#### #0618 — Renewal Negotiation Tactics

Write the renewal negotiation tactics guide for customer success managers handling price-sensitive renewal conversations. The guide should cover: the preparation required before any renewal negotiation (ROI data, health score, competitive intelligence), the opening position (never lead with a discount), how to quantify switching costs for the customer, how to use the threat of competitive pricing intelligently, when to escalate to a VP for commercial support, what concessions to give and in what order, the minimum acceptable renewal terms, and how to document the negotiation for future reference.

#### #0619 — Voice of Customer Program Design

Design the Voice of Customer (VoC) program for a B2B company with 300 enterprise customers. The program should: collect feedback through multiple channels (NPS surveys, post-implementation surveys, QBR feedback, product feedback forms, support ticket follow-up), synthesize insights across channels (who owns VoC data? how is it analyzed?), close the loop with customers who provide feedback (follow-up within 5 business days), report insights to the leadership team monthly (what are customers telling us?), and influence the product roadmap with customer-weighted priorities. Include the governance structure and the ROI measurement.

### #0620 — Customer Education Strategy

Design the customer education strategy for a complex B2B SaaS product that has a 45-day implementation period. The strategy should cover: onboarding learning paths (role-based tracks for admin, power user, and executive users), the LMS or content platform, instructor-led vs. self-paced vs. cohort learning trade-offs, certification programs (customers who are certified have 40% lower churn), integration with the product (in-app learning moments), and how to measure learning effectiveness (knowledge retention, feature adoption correlated with training completion, support ticket reduction). Budget: \$500K/year.

### #0621 — Strategic Account Business Review Template

Write the template for a Strategic Account Business Review — the annual deep-dive meeting with a \$2M+ customer. Unlike a quarterly QBR, the annual review is strategic: it aligns the customer's 3-year business goals with the vendor's product roadmap. Structure: Executive summary of year 1 ROI (15 min), Mutual success story (10 min), Customer's strategic priorities for years 2-3 (20 min), Product roadmap preview with Q&A; (20 min), Expansion discussion and joint go-to-market opportunities (15 min), Executive sponsor relationship segment (15 min). The template should include preparation requirements, materials, and post-meeting action items.

### #0622 — Customer Health Score Design

Design the customer health score model for a B2B SaaS company. The health score is a composite of 5 signals: product usage (30% weight), support tickets (20%), engagement with CS team (15%), payment history (15%), and NPS score (20%). For each signal, define: the data source, the scoring methodology (what score does each data point earn?), the refresh frequency, and the threshold that triggers a CSM alert. Include the health score color coding (Green/Amber/Red) and what action each color requires from the CSM.

### #0623 — Customer Success Compensation Plan

Write the compensation plan for a Customer Success Manager. CSM compensation is difficult to design: CSMs own both retention and expansion, but compensation weighting between the two affects behavior. Proposed plan: \$90K base, \$30K variable. Variable split: 50% on GRR (gross revenue retention, measured quarterly), 30% on NRR (net revenue retention — rewards expansion), 20% on CSAT (customer satisfaction). Write the quota design, the calculation methodology, the accelerator structure for overachievement, and the cap or no-cap policy.

### #0624 — Onboarding Milestone Framework

Write the onboarding milestone framework for a B2B SaaS product with a 90-day onboarding period. Define 5 milestones: (1) Technical setup complete (Day 7), (2) First meaningful use case live (Day 21), (3) Champion user proficient (Day 45), (4) Full team adopted (Day 60), (5) First success metric achieved and documented (Day 90). For each milestone, define: the specific criteria, the validation method, the CSM actions to drive the customer to the milestone, and what happens when a customer falls behind milestone pace.

### #0625 — Customer Advisory Board Facilitation

Write the facilitation guide for the annual Customer Advisory Board (CAB) meeting. The CAB consists of 12 senior executives from strategic customers. Meeting objectives: gather candid product feedback, validate strategic direction, and deepen executive relationships. The guide should cover: the pre-meeting survey to gather agenda input, the 2-day agenda (Day 1: relationship building and company update; Day 2: working sessions on the top 3 product themes), facilitation techniques for getting candid feedback from polite executives, and the post-meeting follow-up cadence.

### #0626 — Churn Prediction Model Requirements

Write the requirements for a churn prediction model. The model should predict which customers are likely to churn in the next 90 days. Input features: usage patterns (logins, feature adoption, time-in-product), support ticket history (volume and severity), NPS trend, payment history, and contract age. Model requirements: precision and recall thresholds, refresh frequency (weekly), explainability requirement (CSMs must understand why a customer is flagged), and integration requirement (auto-creates a Salesforce task when a customer is flagged). Include the model validation approach and the ongoing monitoring requirement.

### #0627 — Customer Segmentation Model

Write the customer segmentation model for a customer success team of 15 CSMs managing 600 accounts. Segmentation by value tier: Tier 1 (>\$100K ACV, 80 accounts) — dedicated CSM, quarterly executive business reviews, 24-hour response SLA. Tier 2 (\$25K-\$100K ACV, 200 accounts) — pooled CSM coverage, bi-annual business reviews, 48-hour SLA. Tier 3 (<\$25K ACV, 320 accounts) — digital-first customer success (automated health monitoring, self-service resources, no dedicated CSM). Write the tier transitions, the resource model, and the expected churn rate by tier.

### #0628 — Executive Sponsor Program Design

Design the executive sponsor program. Each Tier 1 customer (\$100K+ ACV) is assigned a company executive (VP or above) as an executive sponsor. The sponsor's role: executive peer relationship, escalation path, and strategic alignment. The program should: match sponsors to accounts based on industry and relationship (not just availability), define sponsor responsibilities (2 executive touches per year, annual onsite visit for largest accounts), provide sponsors with account briefings before every customer interaction, and measure sponsor engagement quality (not just touches — are customers responding positively?). Write the sponsor briefing template.

### #0629 — Net Promoter Score Action System

Design the NPS action system. Collecting NPS data is common; acting on it is rare. The system should: route detractor responses (0-6) to the CSM within 24 hours with required follow-up, route passive responses (7-8) with a 2-week follow-up SLA, route promoter responses (9-10) to the marketing team for reference and case study outreach, aggregate themes monthly and present to the product team, and close the loop with every respondent (acknowledge and share what was done based on their feedback). Write the workflow, the SLA requirements, and the escalation for unresolved detractor cases.

### #0630 — Customer Communication Calendar

Design the annual customer communication calendar for a B2B SaaS company. The calendar should schedule: quarterly product update emails (from the CPO — not marketing), monthly in-app notifications for new features, annual pricing change notification (minimum 90 days' notice), annual user conference invitation, bi-annual customer survey (NPS/CSAT), and maintenance and downtime notifications (as-needed, 72 hours minimum advance notice for planned maintenance). Specify the audience for each communication (all customers vs. tier-specific), the sender (CSM, product, CEO), and the approval process for company-wide customer communications.

### #0631 — Customer Expansion Discovery Questions

Write the 15 discovery questions a CSM should ask during an expansion discovery conversation. The questions should: uncover the customer's current value realization (what outcomes have they achieved?), identify gaps in their current implementation (what are they not using that could help them?), understand the broader business context (what are they trying to achieve in the next 12 months?), surface expansion signals (are there other teams who could benefit?), and identify the economic buyer for expansion (is it the same person who bought initially?). Write each question with the intent and the follow-up probes.

### #0632 — Customer Training ROI Framework

Write the framework for measuring the ROI of customer training programs. Hypothesis: customers who complete training have higher product adoption, lower churn, and higher expansion rates. The analysis: compare a cohort of customers who completed training vs. a matched cohort who did not (matching criteria: similar ACV, industry, and tenure). Measure: 12-month churn rate, feature adoption rate, NRR, and support ticket volume. Use the delta to calculate the ROI of training investment. Write the methodology, the data requirements, and the reporting format for the CPO.

### #0633 — Customer Case Study Process

Write the customer case study development process. Case studies are valuable for marketing and sales, but getting customer approval is difficult. The process should: identify case study candidates (customers with strong ROI data + a champion who is willing to participate), create a customer-friendly process (make it easy — draft the case study based on data, only ask the customer to review), get legal review of the customer's requirements (some customers require legal approval), design the case study format (2-page format with problem, solution, results, quote), and create 3 versions (full case study for website, 1-pager for sales, and a LinkedIn post format).

### #0634 — Customer Offboarding Process

Write the customer offboarding process for churned accounts. Poor offboarding burns bridges; good offboarding leaves the door open for win-back. The process should: assign a dedicated offboarding CSM (not the relationship CSM who managed the account — distance helps), conduct a final meeting to understand the real reason for churn (not the stated reason), ensure a smooth data export (give the customer their data in a usable format — this is their data), send a formal close letter (acknowledging the relationship and leaving the door open), and enter the account into the win-back tracking system.

### #0635 — Customer Journey Analytics

Write the customer journey analytics framework. The framework connects touchpoints to outcomes: which journey paths lead to high NRR customers, and which paths lead to churn? Data sources: CRM (touchpoint history), product analytics (usage data), support system (ticket history), billing system (payment data). Analysis: map the 5 most common customer journey paths from onboarding to 12-month mark, calculate the NRR and churn rate for each path, and identify the high-correlation touchpoints (the ones that, when completed, predict high NRR). Use this to redesign the customer success playbook.

### #0636 — Customer Reference Program

Design the customer reference program. References are critical for enterprise sales but are overused — the same 3 customers get called constantly. The program should: build a reference pool of 30+ customers (segmented by industry, use case, and size), create a reference tracking system (how many times has each customer been asked?), implement a reference request queue to prevent overuse of popular references, offer reference incentives (conference speaking, co-marketing, early product access), and measure reference quality (do prospects who speak to references convert at a higher rate?). Write the program governance and the reference request SLA.

### #0637 — Customer Feedback Loop to Product

Design the customer feedback loop from CS to Product. Current state: CSMs collect feedback from customers but it disappears into a spreadsheet that the product team ignores. The loop should: standardize feedback collection (what type of feedback qualifies as product-worthy input?), create a structured channel from CS to Product (weekly 30-minute CS-PM sync, centralized feedback repository), enable product to close the loop with customers when their feedback is implemented, and measure feedback influence rate (% of product roadmap items that originated from customer feedback). Write the process and the feedback tagging taxonomy.

### #0638 — Customer Community Strategy

Write the customer community strategy for a B2B SaaS company with 1,200 customers. A customer community creates peer-to-peer learning, reduces support burden, and creates network effects that increase switching cost. Platform decision: Slack vs. Discourse vs. dedicated community platform (Gainsight Digital Hub, Higher Logic). Content strategy: 3 posts per week from the company team (product updates, best practices, thought leadership), customer-generated content incentives (badges, featured member spotlights), and weekly office hours (live AMA with the product or CS team). Moderation policy: who can post, what is prohibited, response SLA from the company team.

### #0639 — Customer Success Operations

Write the CS operations function design for a 25-person customer success team. CS operations (CS Ops) is responsible for: the customer health score model and data infrastructure, the CS technology stack (Gainsight or ChurnZero, Salesforce integration), process design and playbook management, CS team performance analytics, and forecasting (churn and NRR forecast for the CFO). The CS Ops function should start with 1 person and scale to 3 as the team grows. Write the CS Ops job description, the first 90-day plan, and the metrics CS Ops should own.

### #0640 — Enterprise Customer Stakeholder Map

Write the stakeholder mapping guide for enterprise B2B customers with complex buying committees. For a \$500K ACV customer, the CSM should maintain relationships at 5 levels: Day-to-day user (the person who uses the product), Power user / champion (the internal advocate), Economic buyer (the person who controls the budget), Technical buyer (IT or security who approves ongoing use), and Executive sponsor (C-suite who signed the original deal). For each stakeholder type, define: engagement frequency, communication format, the information they care about, and the risk if the relationship goes cold.

### #0641 — Annual Customer Review Preparation

Write the annual customer review preparation guide for CSMs. The annual review is the highest-stakes customer meeting of the year. Preparation should cover: 2 weeks before — compile the value delivered summary (ROI documentation, usage growth, milestones achieved), review the health score history, identify the 3 risks to renewal, and prepare the expansion conversation; 1 week before — confirm the attendees (economic buyer must be present), send the pre-read, and schedule prep with the account executive; Day before — review competitive intelligence, rehearse objection handling, prepare reference from a similar customer.

### #0642 — Customer Satisfaction Response Playbook

Write the customer satisfaction recovery playbook for a customer who has submitted a low NPS score (0-4). The playbook has 5 stages: (1) Acknowledge — CSM calls within 24 hours, thanks the customer for feedback, does not defend the product, (2) Diagnose — root cause conversation (is this a product gap? implementation issue? support failure?), (3) Plan — create a 30-day recovery plan with specific actions, (4) Execute — follow through on every commitment, over-communicate progress, (5) Verify — re-survey in 60 days, confirm the score has improved, and create a success story from the recovery if possible.

### #0643 — CS Team Capacity Model

Write the capacity model for a customer success team. Current state: 12 CSMs manage 480 accounts (\$48M ARR) — a ratio of 40 accounts per CSM. Industry benchmark varies significantly by product complexity and tier. The model should: segment accounts by effort required (Tier 1: 8 accounts per CSM; Tier 2: 25 accounts per CSM; Tier 3: digital-led, no CSM), calculate the ideal CSM headcount for the current account base, model the headcount required at 120%, 140%, and 160% of current ARR, and identify the breakeven point for each new CSM hire (how much ARR must they retain to justify their fully-loaded cost).

#### #0644 — Customer Renewal Calendar

Design the customer renewal calendar system. Renewals should not be reactive — they should be managed on a rolling 12-month view. The system should: show all renewals by month for the next 12 months, flag accounts that are >\$100K with a 180-day advance notice, trigger the renewal health assessment at 120 days, initiate the commercial renewal conversation at 90 days, require a renewal forecast update at 60 days, and escalate to VP CS at 30 days if the renewal is at risk. Write the system requirements, the CSM responsibilities at each milestone, and the renewal forecast categories (Committed, Likely, At Risk, Churned).

#### #0645 — Customer Value Realization Report

Write the quarterly customer value realization report template. The report is sent to the economic buyer at each Tier 1 account. It should: recap the business outcomes the customer committed to when they bought (from the original success plan), show the measurable progress toward each outcome (data, not assertions), highlight 3 successes from the past quarter, identify 1-2 areas for improvement, and preview the next quarter's plan. The report should take the CSM no more than 30 minutes to complete (using a template + data from the health score system). Write the template.

#### #0646 — Partner Customer Success Model

Write the partner customer success model for customers who are managed by reseller partners rather than directly. The challenge: when a customer is managed by a partner, the vendor has limited visibility into the customer's health. The model should: define the vendor's minimum requirements for partner-managed accounts (health score data shared monthly, renewal forecast shared quarterly, escalation protocol for red accounts), create partner enablement for CS skills (training, playbooks), define the 'greenfield' intervention criteria (when does the vendor CSM take over from the partner?), and measure partner CS quality (via customer surveys).

#### #0647 — CS Tool Consolidation

Write the business case for consolidating the customer success team's technology stack. Current tools: Gainsight (health score and playbooks), Intercom (in-app messaging), Zendesk (support), Salesforce (CRM), Looker (analytics). The team spends 35% of their time switching between systems. Proposal: evaluate Gainsight CS + Customer Success platform consolidation that integrates health score, support, in-app messaging, and analytics. Write the total cost comparison (current fragmented stack vs. consolidated), the efficiency savings, the data quality improvement, and the migration risk.

#### #0648 — Digital-Led CS Playbook

Write the digital-led customer success playbook for Tier 3 customers (\$0-\$25K ACV) where dedicated CSM coverage is not economically viable. Digital-led CS uses automation to deliver the CSM experience at scale: automated onboarding sequences (email + in-app), health score monitoring with automated intervention triggers (usage drops trigger an automated resource email, not a CSM call), self-service community and knowledge base, quarterly product update webinars open to all Tier 3 customers, and NPS surveys with automated follow-up workflows. The playbook should specify every automated touchpoint with trigger criteria and message content.

#### #0649 — Customer Success Budget Model

Write the customer success budget model for the next fiscal year. The model should cover: CSM headcount (number of CSMs needed based on the capacity model), CSM compensation (salary, bonus, equity), CS operations support, CS technology tools, customer training programs, customer community and events, and customer research investments. For each line, the model should show current spend, proposed spend, and the ROI or rationale for the change. Total CS spend should be benchmarked against the company's ARR (industry benchmark: 8-12% of ARR on CS for high-touch enterprise model).

#### #0650 — Customer Risk Assessment Framework

Write the customer risk assessment framework for end-of-quarter pipeline analysis. Before the quarter ends, the CS team should assess every renewal due in the next 90 days. Risk categories: (1) Fully committed — customer has confirmed intent to renew, paperwork in progress; (2) Likely to renew — positive signals, low risk; (3) Uncertain — mixed signals, needs active management; (4) At risk — negative signals (usage decline, executive turnover, competitor evaluation), requires executive intervention; (5) Churned — customer has communicated intent not to renew. Write the risk criteria for each category and the action required.

#### #0651 — Customer Lifecycle Documentation

Write the customer lifecycle documentation standard. Every customer account should have a documented lifecycle record including: initial success plan (signed by the customer at onboarding), milestone record (what was achieved and when), health score history, major customer events (executive turnover, expansions, escalations), and the renewal history. This documentation serves 3 purposes: continuity when CSMs change, input for churn analysis, and evidence for the renewal conversation ('here is what we've accomplished together'). Write the standard, the required fields, and the audit process.

#### #0652 — Customer Feedback Survey Design

Design the post-implementation customer feedback survey. The survey is sent at Day 90 (end of onboarding). It should measure: onboarding experience quality (was the implementation smooth?), time to value (how quickly did the customer see value?), CSM satisfaction (was the CSM knowledgeable and responsive?), product first impressions (is the product meeting initial expectations?), and overall likelihood to recommend (early NPS). Keep the survey to 8 questions. Write each question, the scale, and the action threshold (at what score does the CSM need to intervene?).

#### #0653 — Competitive Displacement CS Strategy

Write the customer success strategy for accounts where the company is losing to a competitor. The strategy should: identify competitive displacement signals early (customer requests features the competitor has, mentions competitor in support tickets, champion is replaced by someone who evaluates new vendors), create a competitive response playbook for CSMs (how to handle a competitive evaluation conversation without being defensive), prepare competitive comparison materials (honest, not one-sided), involve sales and leadership for high-value at-risk accounts, and define the post-loss analysis process.

#### #0654 — Customer Success Hiring Plan

Write the customer success hiring plan for scaling from 12 to 20 CSMs over 12 months. The hiring plan should: sequence hires by priority (hire the senior-most CSMs first to cover the highest-value accounts as the team scales), define the ideal CSM profile for each hire (industry background, technical aptitude, CS experience level), set the recruiting process timeline (target 45-day time-to-fill), assign accounts to new CSMs using a structured transition process (3-week overlap with the existing CSM), and design the onboarding for new CSMs (60-day ramp to full productivity). Include the headcount-to-ARR ratio milestones that trigger each hire.

#### #0655 — Customer Sentiment Analysis Program

Design the customer sentiment analysis program using AI tools. The program should analyze: support ticket content (is the language positive, neutral, or negative?), email and Slack communication tone, product reviews on G2 and Capterra, and NPS verbatim responses. The AI should flag accounts where sentiment is declining — even when the usage data looks healthy (customers often complain before they stop using the product). Write the data collection requirements, the AI tool requirements, the integration with the health score system, and the escalation process when sentiment drops below threshold.

### #0656 — CS Enablement Library

Build the customer success enablement library for a 20-person CS team. The library should contain: 10 customer conversation frameworks (health check conversation, expansion discovery, renewal conversation, executive QBR, escalation de-escalation, competitive threat conversation, product adoption coaching, value realization conversation, executive relationship building, and at-risk intervention), 5 email templates (check-in, QBR invitation, escalation acknowledgment, renewal kickoff, and win-back), and 3 presentation templates (QBR deck, executive business review, and case study). Write the framework for the health check conversation.

### #0657 — Customer Expansion Triggers Framework

Write the customer expansion triggers framework. CSMs should reach out proactively for expansion when they see specific signals — not wait for a customer to ask. Define 10 expansion triggers: (1) Customer added 50+ users in the past 30 days, (2) Feature adoption rate exceeds 80% (they have outgrown the current tier), (3) Customer company raised a funding round, (4) Champion got promoted (now has more budget), (5) Customer mentioned a new use case in a support ticket, (6) Customer NPS score increased to 9 or 10, (7) Customer attended 3 training sessions in one month, (8) Customer company announced a major hire or acquisition, (9) Customer mentioned a competitor in a support conversation, (10) Customer passed their 12-month anniversary with high health score. Write the outreach script for 3 of these triggers.

### #0658 — Account Segmentation Review

Write the annual account segmentation review process. Customer accounts should be segmented based on current ACV and expected growth potential — not just current ACV. An account with \$30K ACV that has 10x expansion potential should receive more CS investment than an account with \$50K ACV that has contracted every year. The review should: collect growth potential data (from AEs and CSMs who know the customer's business), overlay growth potential with current health score and NRR trend, recalibrate the segmentation for the upcoming year, and identify the 20 accounts with the highest growth potential that deserve accelerated investment.

### #0659 — CS Leadership Development

Write the CS leadership development program for senior CSMs who aspire to management. The program should prepare future CS leaders for: people management (hiring, coaching, developing CSMs), operational management (capacity planning, forecasting, process design), executive presence (presenting to senior customer and internal stakeholders), and strategic thinking (contributing to CS strategy, cross-functional collaboration). Format: 6-month program, bi-weekly workshops (2 hours each), plus a stretch assignment (lead a team project). Write the curriculum, the selection criteria, and the success metrics.

### #0660 — Customer Value Framework

Write the customer value framework — the model that defines what 'value' means to different types of customers. Different personas value different outcomes: the CFO values revenue impact and cost reduction (show them ROI in dollars), the CTO values technical efficiency and integration (show them time saved and error reduction), the end user values ease of use and time-to-task (show them how their workflow changed), and the CEO values strategic capability and competitive advantage (show them how the product enables outcomes they couldn't achieve before). Write the value narrative and the evidence approach for each persona.

### #0661 — CS QBR Automation

Write the QBR automation strategy. Currently, each QBR takes a CSM 4 hours to prepare (pulling data from 5 systems and formatting into a slide deck). The automation strategy should: build a QBR data connector (auto-pull usage data, support history, health score, and business metrics from all systems), create a QBR template that auto-populates from the connector, use AI to write the data narrative (not the final customer-facing version, but the first draft), and deliver a 90% complete QBR deck to the CSM who spends 30 minutes customizing it. Expected time savings: 3.5 hours per QBR × 4 QBRs/year × 80 accounts = 1,120 hours/year saved.

### #0662 — CS Product Feedback Program

Write the CS-Product feedback program. The CS team is the closest to customer needs, but product feedback from CS often gets lost. The program should: standardize the feedback format (use case, customer quote, frequency, business impact), create a dedicated channel from CS to Product (weekly 30-minute sync, monthly prioritized feedback report), give Product a structured way to evaluate CS feedback against other inputs, close the loop with CSMs when their feedback is implemented ('your feedback on X led to Y feature'), and measure the program's influence (% of product roadmap items influenced by CS feedback).

### #0663 — Customer Health Recovery Case Study

Write the customer health recovery case study format. When a red-health customer is recovered to green, the recovery story should be documented and shared across the CS team. The case study should cover: the initial health situation (what signals indicated risk, what the health score showed), the root cause diagnosis (what was actually wrong?), the intervention plan (what did the CSM and team do?), the key turning point (what specific action or product change made the difference?), and the outcome (health score recovery, NRR improvement, renewal status). Write one complete example case study using a realistic scenario.

### #0664 — CS Team Offsite Agenda

Design the quarterly CS team offsite for a 20-person CS team. The offsite has 3 goals: skill development, team cohesion, and strategy alignment. Day 1: skill-building workshops (morning: executive presence training — how to hold a conversation with a C-suite customer; afternoon: competitive response training — how to handle competitive pressure in a customer conversation). Day 2: strategy alignment (morning: review Q3 OKR retrospective and set Q4 OKRs; afternoon: cross-functional collaboration session with sales and product leaders). Evening: team dinner (no agenda). Write the detailed agenda, the facilitator guide, and the pre-offsite preparation.

### #0665 — Digital CS Metrics Framework

Write the digital customer success metrics framework for customers managed without dedicated CSMs. Digital CS is measured differently from high-touch CS. Key metrics: email open rate and click-through rate (are customers engaging with communications?), in-app notification engagement (are feature announcements getting attention?), self-service portal usage (are customers solving their own problems?), community participation rate (are customers engaging with the peer community?), training completion rate (are customers building product proficiency?), and automated health alert response rate (when the system flags a customer at risk, what % take action after receiving an automated intervention?).

### #0666 — Customer Onboarding Certification

Write the customer onboarding certification program for a complex product with a 90-day implementation period. The certification demonstrates that the customer's team is competent and confident with the product at the end of onboarding. Three certification tracks: (1) User certification (end users who use the product daily — 2-hour assessment), (2) Power User certification (the customer's internal champions who train other users — 4-hour assessment), (3) Admin certification (the technical admin who configures and maintains the product — 6-hour assessment). Write the curriculum, the assessment format, and the digital badge program.

### #0667 — CS Capacity and Coverage Model

Write the CS capacity and coverage model for a team scaling from \$30M to \$70M ARR. At \$30M, the team has 8 CSMs covering 200 accounts. At \$70M, the team will have ~500 accounts. The model should: define the accounts per CSM ratio at each tier (Tier 1: 8 accounts per CSM; Tier 2: 30 accounts per CSM; Tier 3: digital-led), project the headcount needed at \$50M and \$70M ARR, model the revenue protected per CSM (to justify the CS investment to the CFO), and design the hiring sequence (hire Tier 1 CSMs first for the highest-value accounts).

### #0668 — Customer Reference Architecture

Write the customer reference architecture — the technical guide for enterprise customers making the case to their own IT and security teams for adopting the company's product. The reference architecture should: explain the security model (data encryption in transit and at rest, access controls, audit logging), the integration architecture (APIs, webhooks, native integrations with common enterprise systems), the compliance certifications (SOC 2 Type II, ISO 27001, GDPR, HIPAA as applicable), the deployment model options (SaaS, private cloud, on-premise), and the performance and availability SLAs. This document reduces the security and IT approval process time.

### #0669 — CS Annual Planning

Write the CS annual planning process for the VP of Customer Success. Annual planning should cover: the ARR targets (NRR and GRR targets aligned with finance), the headcount plan (how many CSMs and CS Ops staff are needed?), the technology investments (any new tools or upgrades required?), the program investments (what new CS programs will we build or expand?), the key risks (what could prevent us from hitting our NRR target?), and the CS team's contribution to the company's overall ARR goal. The annual plan should be presented to the CEO and CFO for approval.

### #0670 — Customer Success AI Roadmap

Write the AI roadmap for the customer success function. AI applications in CS over 3 years: Year 1 (foundation): AI health score (use ML to predict churn 90 days out with 85% accuracy), AI-assisted QBR drafting (auto-generate first draft from customer data). Year 2 (scale): AI-driven expansion signals (identify expansion opportunities from usage patterns), AI customer sentiment analysis (monitor support tickets and emails for risk signals). Year 3 (transform): AI customer conversation coaching (real-time guidance to CSMs during customer calls), predictive success plans (AI recommends the optimal success plan for each new customer based on similar customer patterns). Write the investment, the ROI, and the talent requirements for each year.

### #0671 — VOC to Product Pipeline

Write the Voice of Customer (VOC) to product pipeline. The pipeline ensures that customer insights collected by CS are systematically evaluated by the product team and translated into roadmap decisions. The pipeline stages: Collection (CSMs submit insights via standardized form with required fields: customer name, use case, frequency, business impact, and customer quote), Aggregation (CS Ops aggregates weekly — how many customers need this, what is the total ARR of requesting customers?), Prioritization (weekly CS-PM review: which insights will be considered for the roadmap?), Roadmap integration (PM confirms which insights will be built, when), and Close-the-loop (CS communicates the outcome to customers who provided the feedback).

### #0672 — Customer Health Score Recalibration

Write the annual health score recalibration process. The health score model decays over time: usage patterns change, new features are released, and customer behavior evolves. The annual recalibration should: re-validate the model's predictive accuracy (does high health score still predict renewal? at what precision and recall?), update the feature weights if customer behavior has changed, add new signals (new features launched this year that are strong retention indicators), and remove deprecated signals (features that are no longer used). Write the methodology and the governance process.

### #0673 — Post-Implementation Assessment

Write the post-implementation assessment (PIA) conducted at day 90. The PIA is a structured review of whether the customer's implementation achieved its goals. Format: 45-minute video meeting with the customer champion and implementation lead. Assessment: were all implementation milestones achieved on time? Did the customer achieve their first stated success outcome? Is the usage at the predicted level? What was the biggest challenge during implementation? Write the PIA template, the scoring rubric, and the escalation process for customers who score below threshold.

#### #0674 — Customer Crisis Communication

Write the customer crisis communication guide for a CS team managing a product outage that has affected 500 customers. The guide should: define the communication sequence (affected customers notified before the public announcement), the communication channels (in-app notification + email + status page), the communication frequency during the incident (update every 30 minutes while the incident is active), the post-incident communication (root cause explanation within 5 business days), and the compensation framework (SLA credits for affected customers). Write the templates for each communication.

#### #0675 — CSM Productivity Standards

Write the CSM productivity standards for a 15-person CS team. Standards: minimum 2 meaningful customer touchpoints per Tier 1 account per month (not counting automated communications), quarterly business review completion rate above 90%, health score update within 3 business days of any signal change, renewal forecast submitted 30 days before each renewal date, and expansion discovery conversation completed for all Tier 1 accounts annually. Write the measurement methodology, the manager reporting cadence, and the coaching protocol for CSMs who fall below standards.

#### #0676 — Executive Relationship Program

Write the executive relationship program for Tier 1 customers. The program matches C-suite executives at the customer with C-suite executives at the company. The goals: executive peer relationship that survives champion turnover, strategic alignment conversations (not just product conversations), and early warning for executive-level concerns. Program design: 2 executive touchpoints per year (one in-person, one virtual), CEO-to-CEO relationship for the top 20 customers, and executive briefing for each touch (what does the customer executive care about this year?). Write the program design and the executive briefing template.

#### #0677 — Customer Success Compensation Redesign

Write the customer success compensation redesign for a CS team that is currently compensated only on base salary with no variable component. The lack of variable compensation has reduced performance differentiation — all CSMs are doing 'good enough' but few are excelling. The redesign should: introduce a 15% variable component, weight the variable on NRR (50%), customer satisfaction (30%), and pipeline contribution (20%), create a clear accelerator structure, and ensure the redesign does not feel punitive to current CSMs (the base should not decrease as variable is introduced). Write the compensation model and the communication plan.

#### #0678 — Customer Story Generation

Write the customer story generation playbook. Customer stories (case studies, video testimonials, reference calls) are the most credible marketing asset — but they are difficult to produce consistently. The playbook should: identify customer story candidates from health score data (Green health + recent milestone achievement = story candidate), create a one-click nomination flow for CSMs, assign story development to a dedicated customer marketing manager (not the CSM — the CSM owns the customer relationship, not the story), offer multiple formats (written case study, video, quote, conference speaking), and track story output against the target (1 new story per \$10M ARR per quarter).

## SECTION 07

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83 unique prompts for senior executives

### #0679 — Monthly Business Review for CEO — CREATE Format

Context: You are the CFO preparing the monthly business review deck for the CEO. It is the end of month 8 (August). Revenue for August came in at \$14.2M, 3% below the monthly plan of \$14.6M. YTD revenue is \$112M, tracking 1.5% behind the annual plan of \$175M. EBITDA for August was -12% (plan was -8%) due to above-plan S&M; spend on a conference. Cash balance is \$28M, runway is 22 months. Request: Write the executive summary narrative for the MBR — the 3-paragraph opening that the CEO reads before looking at any data. Cover: headline performance, key drivers of variance, and the action being taken to close the gap. Adjustments: Be precise with numbers. The CEO does not need context on what a P&L is — get straight to the insight. Do not pad with positives to soften bad news — lead with the reality, explain the cause, then describe the fix. Tone: The tone of a CFO who owns the numbers and has a plan, not one who is surprised or defensive.

### #0680 — Board Pack Preparation System — One-Shot

Design a repeatable system for preparing a high-quality board pack every quarter. The pack must be distributed 5 business days before the board meeting and should enable directors to arrive fully informed. Example of a well-structured board pack: 'Section 1: CEO Letter (2 pages) — highlights, 3 key decisions for board, tone-setter Section 2: Financial Performance (8 pages) — P&L; cash flow, balance sheet, KPI dashboard, CFO narrative Section 3: Business Unit Updates (2 pages each x 3 units) — each with headline, metrics, initiatives, risks Section 4: Strategic Updates (4 pages) — progress on board-approved strategic initiatives Section 5: Governance (3 pages) — risk register update, compliance, policies for approval Section 6: Forward Look (2 pages) — next quarter forecast, key milestones, decisions required Appendix: Detailed financials, committee minutes, legal matters' Write the complete board pack production system: the 6-week calendar, responsible owners for each section, review process (CFO/CEO review before distribution), quality standards, and what to do when a section is late.

### #0681 — Investor Update Email — One-Shot

Write the quarterly investor update email for a Series B startup. The email goes to 14 investors (2 lead VCs, 12 angels). It is the Q3 update and the company has had a mixed quarter: ARR grew from \$8M to \$9.4M (+18%), ahead of plan; burn rate increased from \$650K to \$850K/month (behind plan, due to 5 unplanned hires); the product's AI feature shipped and is getting strong early feedback; the VP of Engineering departed on good terms. Write the email. Cover: headline metrics, highlights, lowlights (honest), team update, Q4 plan, and the one ask from investors this quarter. Format as an email, not a deck. Max 500 words. First-person from the CEO. Be honest — investors who learn bad news early are better partners than those who feel surprised at the next board meeting.

### #0682 — AI ROI Dashboard Design — Chain-of-Thought

I need to build an AI ROI dashboard for the board. We have deployed 8 AI initiatives in the past 12 months and need to report the combined ROI. Walk me through how to design this dashboard properly. Step 1: What should the board see on this dashboard? Define the right level of aggregation — not too granular, not too abstract. Step 2: What metrics capture AI ROI? Go beyond 'cost savings' — what other value dimensions matter? Step 3: For each AI initiative, what data do I need to measure ROI? What is likely available vs. what requires new measurement? Step 4: How do I handle attribution? AI initiatives rarely have clean before/after — how do I make the ROI numbers credible? Step 5: How do I show the dashboard's limitations honestly? (The board should trust data that acknowledges its own uncertainties.) Step 6: How do I design the physical dashboard — what layout, what charts, what tables? Work through each step, then sketch the dashboard layout.

### #0683 — KPI Commentary Writing Guide — Role-Based

Act as a seasoned CFO known for writing business commentary that cuts through the data to the insight. I have a junior analyst who writes KPI commentary like this: 'Revenue in Q3 was \$42M, up 28% from \$32.8M in Q2 and 35% from \$31.1M in Q3 of the prior year. EBITDA was \$5.4M, representing a 12.9% margin, compared to 8.2% in Q2.' This is data reporting, not insight. Teach this analyst how to write commentary that tells the story behind the numbers. Give: 1. The difference between data reporting and business insight (with the above example to illustrate) 2. The 5 questions good KPI commentary answers 3. The rewritten version of the passage above 4. A framework for writing any KPI commentary section in 5 minutes 5. The 3 phrases that always indicate shallow commentary and should be cut

### #0684 — Quarterly Financial Report Template

Create a quarterly financial report template for a B2B SaaS company presenting to its board. The template should include: executive summary (3 bullets: headline, driver, action), income statement with prior quarter and prior year comparisons, ARR waterfall (opening balance, new ARR, expansion ARR, churned ARR, closing balance), unit economics table (CAC, LTV, LTV:CAC, CAC payback, gross margin, NRR), cash and runway, and an exceptions section for items outside plan that require board awareness. Include formatting guidance for each section.

### #0685 — CEO Weekly Operating Cadence

Design the CEO's weekly operating cadence — the meetings, reports, and rituals that keep a 300-person company running. Include: Monday morning leadership sync (agenda, attendees, duration), Wednesday operating review (which metrics, who presents, how decisions are made), Friday close-of-week email to the company (format and what to include), daily standups (yes or no? for which teams?), the one-on-one schedule with direct reports, and the CEO's protected thinking time blocks. Include a note on what meetings the CEO should NOT be in.

### #0686 — Exception Reporting Framework

Write the exception reporting framework for a company with 15 departments. Exception reports should surface: anything more than 10% behind plan, any SLA breaches in the past week, any regulatory or compliance issues, any people issues (resignations, PIPs, grievances), and any external events that could impact the business. Define: the format for each exception report, the escalation threshold (when does an exception trigger a CEO alert vs. a department review?), the meeting cadence for reviewing exceptions, and what to do when departments under-report exceptions.

### #0687 — Customer Success Metrics Report for Investors

Write a monthly customer success metrics report for a SaaS investor update. Metrics to report: Net Revenue Retention (NRR) with prior period and benchmark, Gross Revenue Retention (GRR), churn analysis (number of churned accounts, total ARR churned, why they churned — categorized), health score distribution (% Red/Amber/Green), QBR completion rate, NPS with trend, and customer expansion pipeline. For each metric, include: the current figure, the trend (up/down/flat), the benchmark (industry or internal target), and a 1-sentence commentary on the driver.

### #0688 — Annual Report Narrative Writing Guide

Write the guide for crafting the annual report narrative section — the pages before the financial statements where the CEO and leadership tell the company's story. The guide should cover: how to write a CEO letter that builds trust rather than selling (honest about challenges, specific about wins), how to use data in narrative without turning it into a spreadsheet, the 3 stories every annual report should tell (where we came from, what happened this year, where we are going), how to handle a bad year without being defensive, and the one thing most annual reports get wrong (too much pride, not enough honesty).

### #0689 — CISO Board Report

Write the quarterly CISO security report for the board audit committee. The report should cover: threat landscape summary (what threats are most active in our industry right now), security posture update (key metrics: mean time to detect, mean time to respond, % of systems patched within SLA, phishing simulation results), incidents in the quarter (number, severity, response time, resolution), upcoming risks (regulatory changes, planned technology deployments that create new attack surface), budget usage, and the one ask from the board (approval, awareness, or decision). Max 4 pages. Written for non-technical board members.

### #0690 — People Analytics Report

Write the monthly people analytics report for the CEO. The report should cover: headcount (total, by department, by level, vs. plan), attrition (voluntary and involuntary, trailing 12-month rate, department breakdown), time-to-fill for open roles, internal mobility (promotions, lateral moves), engagement score trend (if surveyed), absenteeism rate, and cost per hire. For each metric, include the trend (improving/declining), the benchmark (industry or internal target), and a 1-sentence highlight on the most important people insight this month.

### #0691 — Competitive Intelligence Brief

Write the monthly competitive intelligence brief for the leadership team. Format: one page per major competitor. For each competitor, cover: recent news (funding, product launches, partnerships, executive changes), win/loss trends against them (based on CRM data), pricing changes (if known), key messages they are using in market (from sales calls and review sites), and our recommended response (messaging update, sales tactic, product priority). This month, cover your top 3 competitors. Make it specific and actionable — not a Wikipedia summary of what the companies do.

### #0692 — Sales Forecast Methodology

Write the sales forecast methodology document for the FP&A; team and sales leadership. The methodology should cover: the data inputs (Salesforce opportunity data, rep confidence scores, historical close rates by stage, deal size), the forecast model (weighted pipeline by stage x close rate vs. manager roll-up vs. AI-assisted forecast model), the forecast granularity (weekly update, monthly close, quarterly guidance), how upside and downside scenarios are calculated, how the forecast is used for hiring and capacity planning, and how forecast accuracy is measured over time (what is acceptable variance?).

### #0693 — ESG Metrics Reporting Framework

Write the ESG metrics reporting framework for the annual sustainability report. Environmental metrics: Scope 1, 2, and 3 emissions (with measurement methodology for each), energy consumption, renewable energy percentage, waste reduction targets. Social metrics: employee diversity (gender, ethnicity, by level), pay equity analysis, employee safety incidents, community investment. Governance metrics: board diversity, executive compensation ratio, ethics hotline usage, data privacy incidents, anti-corruption training completion. For each metric, specify: the measurement unit, the data source, the reporting frequency, the baseline year, and the 2025/2030 target.

### #0694 — Technology Performance Dashboard

Design the weekly technology performance dashboard for the CTO. Metrics to track: system uptime (vs. SLA), mean time to resolve incidents (by severity), deployment frequency and success rate, security vulnerability count (open by severity), infrastructure cost (vs. budget), on-call burden (incidents per engineer per month), engineering team velocity (story points per sprint), and AI system performance metrics (for each production AI system: accuracy, latency, cost per query, error rate). Include how each metric is calculated, the data source, and the target.

### #0695 — Customer Revenue Analytics Report

Write the monthly customer revenue analytics report for the board. Metrics to include: ARR waterfall (opening + new + expansion - churn - downgrades = closing), NRR and GRR by cohort and by segment, top 10 expansions this month and their story, top 5 churns this month with root cause, cohort retention curves (month 6, 12, 24 retention rates), LTV:CAC by acquisition channel, and payback period trend. Highlight the insight that matters most to the board — not just the numbers, but what the numbers mean for the company's long-term health.

### #0696 — Operational Metrics Framework

Write the operational metrics framework for a 200-person professional services firm. The firm delivers AI consulting engagements. Metrics to track: utilization rate (billable hours / available hours, target: 72%), average bill rate per level (target and actuals), project margin (revenue - direct costs, by project and in aggregate), client satisfaction score (post-project NPS), proposal win rate, revenue per employee, and employee development hours. For each metric, include the calculation methodology, the data source (timesheet system, CRM, finance system), the reporting frequency, and the action threshold.

### #0697 — Data Quality Report for AI Systems

Write the monthly data quality report for an AI product team. The report should cover: input data quality metrics (completeness, accuracy, consistency, timeliness for each data source feeding the AI models), model performance metrics (accuracy, precision, recall, F1 by model and by segment), drift indicators (feature drift, prediction drift — signals that model performance may be degrading), data pipeline health (latency, failure rate, volume anomalies), and the top 3 data quality issues from the past month with root cause and remediation status. This report is for the CAIO and AI ops team.

### #0698 — Financial Close Checklist

Write the end-of-month financial close checklist for the accounting team. The checklist should cover all key activities in sequential order: bank reconciliations, accounts receivable reconciliation (AR aging, bad debt provision), accounts payable reconciliation, payroll processing and reconciliation, intercompany eliminations (for multi-entity structures), revenue recognition review (ASC 606 compliance for SaaS), fixed asset depreciation run, tax provision calculation, variance analysis against budget, management accounts preparation, and CFO sign-off. Each item should include: who is responsible, the deadline (D+1, D+3, D+5 after month end), and the risk of missing the deadline.

### #0699 — Customer Lifetime Value Dashboard

Design the customer lifetime value (LTV) tracking dashboard for a CFO. Metrics: average LTV by acquisition cohort (monthly), LTV:CAC ratio trend, LTV by segment (enterprise vs. mid-market vs. SMB), payback period trend, LTV confidence interval (what is the statistical range of the LTV estimate?), and the assumptions driving the LTV model (churn rate assumption, expansion assumption, gross margin assumption). Include how each metric is calculated, the data refresh frequency, and what trends should trigger a CFO-level conversation about the business model.

### #0700 — Department Budget vs. Actuals Report

Design the standard monthly department budget vs. actuals report template. The report should show: budget, actuals, variance (in dollars and %), YTD budget, YTD actuals, YTD variance, and full-year forecast for each cost line. Include a variance explanation section where managers explain variances over 10% in a single sentence. Format: the template should be auto-populated from the ERP system with only the explanation column requiring manual input. Include traffic light formatting (Red > 10% overspend, Amber 5-10%, Green < 5%).

### #0701 — Revenue Bridge Analysis

Write the revenue bridge analysis format for communicating Q3 revenue performance to investors. A revenue bridge shows the drivers of change from one period to another. The bridge should decompose the revenue movement from Q2 to Q3 into: new logo revenue contribution, expansion revenue contribution, churn impact, pricing impact (if any pricing changes occurred), and foreign exchange impact (if international revenue). Each bar in the bridge chart should have a narrative annotation explaining the driver. Include the chart design specification and the narrative commentary.

### #0702 — Weekly Ops Email Template

Write the CEO's weekly ops email to the entire company. The email goes out every Friday at 5pm. Format: What moved this week (top 3 wins — specific and named), What we're still working on (honest about 1-2 ongoing challenges), Metric of the week (one number the company should know), Shoutout (recognize one person or team by name with specific reason), Looking ahead (1-2 things happening next week that affect the whole company). Max 300 words. Tone: direct, human, transparent — this is how the CEO communicates that they're paying attention.

### #0703 — SLA Reporting Dashboard

Design the customer-facing SLA reporting dashboard for an enterprise SaaS company. Metrics to display: system uptime (current month and trailing 12 months vs. SLA of 99.9%), P1 incident count (current month), average time to acknowledge P1 incidents (target < 15 minutes), average time to resolve P1 incidents (target < 4 hours), planned maintenance windows (upcoming and historical), and API response time trend (last 30 days). Design the dashboard to be accessible to customers directly — transparent SLA reporting builds trust and reduces support inquiries.

### #0704 — Strategic Initiative Status Report

Write the strategic initiative status report template for the CEO's monthly review. The report tracks the company's top 5 strategic initiatives. For each initiative, report: name and sponsor, status (On Track / At Risk / Off Track), summary of progress this month (3 bullet points), key milestone next 30 days, budget status (spend vs. plan), headcount status (actual vs. planned), risks and blockers (with owner and action), and the metric that will tell us if this initiative is succeeding. Format as a 1-page per initiative summary with consistent structure across all initiatives.

### #0705 — AI Performance Report for CAIO

Write the monthly AI performance report for the CAIO. The report covers all production AI systems. For each system, report: system name and purpose, total queries this month and trend, accuracy/quality score (from evaluation framework) and trend, cost per query and total monthly cost vs. budget, user adoption rate (active users / licensed users), top 3 user complaints or friction points, model updates deployed this month, and incidents or near-misses. The report should end with a RAG status summary across all systems and the top 3 CAIO-level actions required.

### #0706 — Talent Market Report

Write the talent market report for the CPO and CEO. The report should cover: hiring market conditions in the company's key talent markets (engineers, sales, AI specialists), competitive compensation intelligence (are our offers being accepted? at what rate? what are candidates citing when declining?), key talent metrics from the past month (offers extended, offers accepted, offers declined with reasons, time-to-fill by level), and the talent market outlook for the next quarter. The goal is to help the CEO and CFO make proactive decisions about comp budgets and hiring plans before problems emerge.

### #0707 — Enterprise KPI Dictionary

Write the KPI dictionary for a \$200M ARR enterprise SaaS company. For each of 20 key metrics, define: the metric name and definition (precise, not vague), the formula or calculation methodology, the data source (which system), the refresh frequency, the owner (who is responsible for the accuracy of this number?), the internal benchmark (what is 'good' for this company?), and the industry benchmark (what do peers report?). Metrics to include: ARR, MRR, NRR, GRR, churn rate, CAC, LTV, CAC payback, gross margin, EBITDA, headcount, time-to-fill, NPS, CSAT, product adoption rate, support ticket volume, P1 resolution time, security incidents, pipeline coverage, and win rate.

### #0708 — Investor Reporting Automation Strategy

Write the strategy for automating investor reporting. Currently, preparing the monthly investor update takes the CFO team 3 days of manual work — pulling data from 8 different systems and formatting it in slides. The automation strategy should: identify the data sources, the automation technology (a BI tool like Looker, a purpose-built investor reporting tool, or custom scripts), the workflow (automated data refresh → automated report generation → CFO review → distribution), the review and sign-off process (automation does not eliminate human judgment on narrative), and the time savings and quality improvement expected from automation.

### #0709 — Metrics Definition Dictionary

Write the company metrics definition dictionary. The problem this solves: different teams calculate the same metric differently, creating conflicting reports. For each of 15 key metrics (ARR, MRR, NRR, GRR, CAC, LTV, payback period, burn rate, runway, headcount, attrition, NPS, pipeline coverage, win rate, quota attainment), define: the exact formula, the data source, the business owner, the review frequency, and the edge cases (e.g., 'does a \$0 renewal count as churn?').

### #0710 — Monthly Business Review Template

Write the monthly business review (MBR) template for a 5-person executive team. The MBR should take 90 minutes and cover: financial performance (20 min), sales and pipeline (20 min), product and engineering (15 min), customer success (15 min), people metrics (10 min), and cross-functional issues requiring executive decision (10 min). Include: the preparation requirements for each section owner, the reporting format (no slide decks — the MBR uses a written pre-read), and the decision log to record actions taken during the meeting.

### #0711 — CEO Dashboard Design

Design the CEO's real-time dashboard. The CEO needs to answer 3 questions at any moment: Is the business growing? Is the business healthy? What needs my attention? The dashboard should have 3 sections: (1) Growth (ARR, MRR, new logo count — trailing 30 days and vs. plan), (2) Health (churn, gross margin, burn rate, runway), and (3) Alerts (any metric that has crossed a threshold requiring CEO attention). The dashboard refreshes daily. Write the metric definitions, the threshold triggers, and the visualization specification.

### #0712 — Sales Pipeline Review Format

Write the weekly sales pipeline review format for a VP of Sales and their team of 8 AEs. The review should be data-first (pull pipeline data before the meeting), use a deal-by-deal review only for deals in the final 2 stages (not every deal in the pipeline), focus on actions required (what needs to happen to move each deal forward?), and avoid the 'sandbag meeting' dynamic where AEs inflate confidence to avoid scrutiny. Duration: 60 minutes. Include the pre-read format, the deal card template, and the pipeline hygiene standards (what data is required for a deal to be 'pipeline worthy').

### #0713 — Investor Update Best Practices

Write the investor update best practices guide for founders. Frequency: monthly for seed/Series A, quarterly for Series B+. Format: lead with the headline number (ARR or revenue), share what went well with specifics, share what is not going well with specifics (investors who receive only good news lose trust faster), and end with the ask (do you need introductions? advice? specific help?). Length: 400 words maximum. Common mistakes: updating only when things are going well, not asking for help, burying bad news in the middle, and using too many slides.

### #0714 — Financial Forecast Methodology

Write the financial forecast methodology for a SaaS company. The forecast should be bottoms-up: start with customer-level ARR predictions (contract renewal dates, expansion plans, expected churn), roll up to total ARR, then add new bookings forecast (sales pipeline × stage-weighted close rate), and subtract expected churn (rolling 12-month churn rate applied to current ARR base). Compare the bottoms-up forecast to a top-down sanity check (management expectation, investor guidance). Show the forecast at 3 probability levels: Base, Upside (P90), and Downside (P10).

### #0715 — Operations Review Cadence

Write the operating cadence design for a 200-person company. Define the meetings at each frequency: Daily stand-ups (product engineering teams), Weekly meetings (leadership team business review, sales pipeline, CS renewal forecast), Monthly (full company all-hands, board operations committee), Quarterly (board meeting, OKR review, strategic planning), and Annually (board strategy session, all-hands planning, performance reviews). For each meeting, write the purpose, the attendees, the owner, the preparation required, and the expected output. Identify and eliminate the 3 most common unnecessary meeting types.

### #0716 — Data Quality Framework

Write the data quality framework for a company where reporting inaccuracies are causing leadership distrust of dashboards. Data quality dimensions: Accuracy (is the data correct?), Completeness (is the data missing values?), Consistency (does the same data give the same answer across systems?), Timeliness (is the data current?), and Validity (does the data conform to the right format and business rules?). For each dimension, define the measurement methodology, the acceptable threshold, and the remediation process when the threshold is violated. Assign data quality ownership by data domain.

### #0717 — Executive Reporting Automation

Write the technical requirements for automating executive reporting. Current state: the finance and analytics team spends 40 hours per week manually compiling reports from 6 systems. Automation requirements: (1) connect all data sources via APIs (ERP, CRM, product analytics, HRIS, support system, billing system), (2) build a data warehouse as the single source of truth, (3) automate the transformation and calculation logic (ARR calculations, cohort analysis, attrition rate), (4) build self-service dashboards in a BI tool (Looker, Metabase, or Tableau), (5) schedule automated report distribution to executives. Write the implementation plan and the tool selection criteria.

### #0718 — Competitive Intelligence Reporting

Design the competitive intelligence reporting program. Monthly: a 1-page competitive update for the executive team covering: new competitor product announcements, competitor customer wins/losses (from Gong and win/loss data), competitor pricing changes, and competitor funding or M&A activity. Quarterly: a competitive deep-dive on the top 3 competitors (product comparison, pricing, go-to-market, recent wins). Annual: a competitive landscape report for the board. Define the data collection methodology (G2, review sites, LinkedIn, press releases, customer conversations) and the distribution list.

### #0719 — Burn Rate and Runway Reporting

Write the burn rate and runway reporting framework for the board. Monthly reporting: gross burn (total cash spend), net burn (gross burn minus revenue), ending cash balance, and runway at current burn rate and at 120% burn rate (stress test). Red flag triggers: cash balance drops below 12 months of runway, burn rate increases by more than 20% quarter-over-quarter without a corresponding ARR increase, and projected runway drops below 18 months. Write the board reporting format, the trigger thresholds, and the CFO certification requirement for monthly cash reporting.

### #0720 — Product Analytics Framework

Write the product analytics framework for a SaaS product. The framework should define: activation metrics (what does a 'activated user' look like — first meaningful action in product), engagement metrics (DAU/MAU ratio, feature adoption rate, session depth), retention metrics (D1, D7, D30, D90 retention cohorts), and revenue metrics (expansion rate by product feature, correlation between feature usage and NRR). Write the tracking requirements (what events to instrument), the analysis cadence, and the product team reporting format. Include the 'North Star Metric' concept and how to choose one.

### #0721 — Annual Business Planning Template

Write the annual business planning template. The plan covers: the strategic context (where is the company, what is the opportunity, what are the risks?), the financial plan (P&L, headcount, capex — 3 scenarios: base, upside, downside), the operational plan by function (what does each function commit to delivering?), the capital plan (how much is available to invest and in what?), and the key metrics dashboard (what 10 numbers will tell us if this plan is on track?). Length: 20 pages maximum. Audience: board and executive team. Include the planning process and the timeline for building the plan.

### #0722 — Customer Revenue Analytics

Write the customer revenue analytics framework. The framework tracks: ARR by acquisition cohort (what ARR was added each quarter and how much of it is still alive?), ARR by customer segment (enterprise vs. mid-market — which segment has better NRR?), ARR movement waterfall (new bookings + expansion - contraction - churn = net new ARR), and the 'rule of 40' check (growth rate + profit margin — is it above 40?). For each analysis, write the calculation methodology, the visualization type, and the insight it generates for the CEO and board.

### #0723 — AI-Generated Report Quality Control

Write the quality control framework for AI-generated reports. As AI is used to generate financial analyses, market reports, and executive summaries, the risk of error increases. The QC framework should: specify the human review requirement for each report type (financial reports require CFO sign-off, AI-generated customer analyses require CSM review), define the fact-checking protocol (every statistic cited must be traceable to a primary source), require disclosure when AI is used in report generation (standard footer: 'This report was generated with AI assistance and reviewed by [name]'), and create an error tracking log.

### #0724 — Revenue Attribution Model

Write the revenue attribution model for a company with multiple marketing channels. The problem: marketing claims ARR influenced by paid ads, organic search, and events — but there is double-counting because prospects touch multiple channels. The model should compare: last-touch attribution (gives all credit to the last touchpoint — simple but unfair), first-touch attribution (gives all credit to the first touchpoint — better for awareness channels), linear attribution (equal credit to all touchpoints), and data-driven attribution (uses regression to assign credit based on conversion impact). Recommend data-driven attribution with a practical implementation plan.

### #0725 — Real-Time Alerting System

Design the real-time alerting system for the executive team. Alerts should fire when: ARR drops by more than 0.5% in a single day (contract termination?), a new customer deal closes above \$500K (celebrate + notify CEO), a customer with >\$100K ACV submits a support ticket escalated to P1, the company's uptime drops below 99.9%, an employee expense claim exceeds \$10K (approval required), or a key vendor's credit rating is downgraded. Write the alert triggers, the routing (who gets which alerts?), and the escalation if alerts are not acknowledged within 30 minutes.

### #0726 — Operating Leverage Dashboard

Design the operating leverage dashboard for the CFO. Operating leverage measures how efficiently the company scales: as revenue grows, do operating costs grow at a slower rate? The dashboard should show: revenue growth rate vs. opex growth rate (trend over 8 quarters), gross margin trend (as the product scales, does gross margin improve?), sales efficiency (revenue generated per dollar of sales and marketing spend), R&D efficiency (ARR per dollar of R&D spend), and the rule-of-40 score by quarter. Each metric should have a 2-year trend and a peer benchmark.

### #0727 — Weekly Metrics Email to Investors

Write the weekly metrics email format for keeping investors updated between formal board meetings. The email should be short (under 200 words), include 5 key numbers (ARR, new ARR this week, pipeline, burn, key win), be honest about challenges (never only good news), and end with a question or ask (investors should feel engaged, not just informed). Write the format and the 5 metrics — explain why each was chosen and what it tells an investor about business health.

### #0728 — Data Governance Framework

Write the data governance framework for a company experiencing data proliferation problems: too many dashboards, conflicting definitions, and no single source of truth. The framework should: establish a data governance council (CFO chair, with heads of finance, product, marketing, and engineering), define the official metrics and their calculations (the 'golden record'), create a new metric proposal process (any new metric must be approved by the data governance council), assign metric ownership (each metric has one owner responsible for accuracy), and set the data quality standards and audit process.

### #0729 — Strategic Metrics Scorecard

Write the strategic metrics scorecard for the board. The scorecard has 20 metrics divided into 4 perspectives: Growth (5 metrics: ARR, new logo count, NRR, pipeline, win rate), Efficiency (5 metrics: CAC payback, gross margin, burn multiple, headcount productivity, sales cycle length), Customer (5 metrics: NPS, GRR, time-to-value, product adoption, support SLA compliance), and People (5 metrics: engagement score, attrition, time-to-fill, promotion rate, training completion). For each metric, show current, prior quarter, prior year, and target. Format as a one-page dashboard for the board package.

### #0730 — Operational KPI Library

Write the operational KPI library for a 300-person company. The library documents 50 operational KPIs across all functions: Sales (10 KPIs), Marketing (8 KPIs), Product (8 KPIs), Engineering (6 KPIs), CS (8 KPIs), Finance (6 KPIs), and HR (4 KPIs). For each KPI: name, definition, formula, data source, owner, frequency, and benchmark. The library ensures that when a new leader joins the company, they immediately understand how performance is measured in their function and have access to historical benchmarks.

### #0731 — Pricing Analytics Dashboard

Design the pricing analytics dashboard for the VP of Product and CFO. The dashboard should track: average selling price by segment (is pricing consistent across deals?), discount rate by deal size and AE (who is giving too many discounts?), price realization rate (% of list price being collected), price increase acceptance rate (tracking the recent 10% price increase), ARR by price tier, and the correlation between price paid and NRR (do customers who pay less churn more?). Include the data sources and the refresh cadence.

### #0732 — Executive Report Narrative Framework

Write the executive report narrative framework. Numbers without context mislead. The framework should: require every data point to be accompanied by interpretation (not 'revenue was \$8.2M' but 'revenue was \$8.2M, 3% above plan, driven by strong enterprise performance'), distinguish between 'so what' (current state) and 'now what' (recommended action), use consistent language for performance levels (use 'significantly above,' 'above,' 'in line,' 'below,' 'significantly below' rather than ad-hoc language), and define the executive summary format (headline first, data second, recommendation third).

### #0733 — Variance Analysis Framework

Write the variance analysis framework for monthly financial reporting. When actuals differ from budget, the variance must be explained with root causes, not just described. Framework: (1) Calculate the variance in dollars and percent, (2) Classify the variance type (volume variance = sold more or less units; price variance = unit price higher or lower; mix variance = sold different products than planned; one-time items), (3) Assess whether the variance is likely to continue (structural) or is temporary, (4) State whether the variance changes the full-year forecast, and (5) Recommend a management response if the variance requires action.

### #0734 — AI Cost Reporting

Write the AI cost reporting framework for a company deploying multiple AI systems. AI costs are different from traditional software costs: they are variable, hard to attribute to a specific department, and difficult to benchmark. The framework should: track AI spend by model (OpenAI, Anthropic, Google), by application (customer service bot, internal copilot, product AI feature), by cost type (API calls, compute, storage, fine-tuning), by department (which department's usage is driving cost?), and report cost per query/interaction (the unit economics of AI). Include the budget allocation methodology and the cost anomaly detection threshold.

### #0735 — Portfolio Company Reporting Standard

Write the portfolio company reporting standard for a PE firm with 8 portfolio companies. Each portfolio company submits a monthly report within 5 business days of month end. The standard should define: the required financial metrics (P&L, balance sheet, cash flow, covenant compliance), the operational metrics (revenue by product, headcount, key customers), the risk and issues (top 3 risks with mitigation plans), and the format (Excel template for financial data, 1-page narrative). Describe the PE firm's review process, the escalation for companies with concerning trends, and the quarterly board presentation standard.

### #0736 — Competitive Win/Loss Reporting

Write the competitive win/loss reporting program. Every closed-won and closed-lost deal is analyzed for competitive intelligence. The program should: collect win/loss data from all AEs (standardized fields: competitor name, reason won/lost, key decision criteria, customer budget), conduct 20% of deals as in-depth interviews (30-minute call with the buyer), aggregate monthly insights for the sales and product teams, calculate win rates by competitor pair, and produce a quarterly competitive trend report for the executive team. Include the win/loss question set for the post-deal survey.

### #0737 — BI Tool Implementation Plan

Write the BI (Business Intelligence) tool implementation plan for a company migrating from spreadsheet-based reporting to a self-service analytics platform. The migration should: identify the 20 highest-value reports to migrate first (the ones the executive team uses most), build the data model in the BI tool (clean, documented, consistent), train 30 power users to build their own reports (reducing load on the analytics team), set governance requirements for published dashboards (reviewed by analytics team before sharing broadly), and measure success (target: 80% of executive reporting migrated within 6 months).

### #0738 — Employee Productivity Analytics

Write the employee productivity analytics framework for a knowledge worker organization. Important caveat: productivity is difficult to measure in knowledge work and surveillance-based metrics undermine trust. The right approach: measure team-level outcomes (OKR achievement, project delivery rate, quality metrics), not individual-level activity (keystrokes, login hours). The framework should: define what 'productive' means for each role type (engineer: code quality + delivery speed; salesperson: pipeline and revenue; CSM: NRR and NPS), collect productivity data from existing systems (not surveillance software), and use the data to remove blockers rather than to rank individuals.

### #0739 — AI Analytics Implementation

Write the implementation plan for an AI-powered analytics platform that will replace the current manual reporting process. The platform should: consolidate data from 8 source systems into a data warehouse (BigQuery or Snowflake), use AI to auto-generate narrative commentary on data trends (CFO-facing reports should have written interpretation, not just charts), build predictive analytics capabilities (revenue forecast model, churn prediction), and provide self-service access for business users who currently wait 2 days for a data request. Timeline: 12 months. Investment: \$800K. Write the phased implementation plan and the team required.

#### #0740 — OKR Progress Dashboard

Design the company-wide OKR progress dashboard. The dashboard should be visible to all employees and show: company OKRs with current progress (live confidence scores), team OKR aggregated view (% of teams on track), trend over time (is overall OKR achievement improving quarter-over-quarter?), and the risk indicator (how many KRs are currently below 5/10 confidence?). The dashboard refreshes weekly. Write the metrics, the visualization specification, and the access policy (who can edit vs. view only).

#### #0741 — Financial Model Documentation Standard

Write the financial model documentation standard for the finance team. Every financial model used for decision-making must have: a documentation cover sheet (model name, version, owner, last update date, purpose, key assumptions), assumption documentation (every input cell must have a comment explaining the source and rationale), output documentation (the key outputs are clearly labeled and the formula logic is explained), version history (a log of changes made in each version), and a model audit trail (who reviewed the model and when). Write the standard and provide a documentation template.

#### #0742 — Competitive Market Share Tracking

Design the competitive market share tracking system. The company does not have access to competitors' revenue data (they are private). Proxies for market share: G2 and Capterra review volume trends (proxy for install base growth), LinkedIn employee count trends (proxy for revenue growth), job posting data (what functions is each competitor hiring in?), web traffic data (SimilarWeb estimates), and customer win/loss data (which competitors are we winning and losing to most often?). Write the data collection methodology, the update frequency, and the competitive market share estimate model.

#### #0743 — Executive Onboarding Metrics Dashboard

Design the executive onboarding dashboard for new C-suite hires. The dashboard should track the new executive's first 90 days: onboarding checklist completion (% of Week 1-12 tasks completed), relationship building progress (how many key stakeholder meetings have been completed?), early win status (has the executive identified and completed at least one early win?), team assessment completion (has the executive completed their team capability assessment?), and the 90-day plan (has the 90-day plan been presented and approved by the CEO?). The dashboard is reviewed weekly by the CPO and the new executive.

#### #0744 — SaaS Metrics Benchmark Report

Write the SaaS metrics benchmark report for the company to compare itself against peers. The report should cover: ARR growth rate (the company is at 35% — what is the benchmark for comparable companies?), NRR (the company is at 112% — good but not great by enterprise SaaS standards: best-in-class is >120%), gross margin (the company is at 74% — below the 78-80% benchmark for pure SaaS — the gap is due to professional services revenue), CAC payback (the company is at 20 months — the benchmark is <18 months for best-in-class), and burn multiple (the company is at 1.8 — the benchmark is <1.5). Write the analysis and the improvement priorities.

#### #0745 — Revenue Forecasting Committee

Write the revenue forecasting committee charter. The committee meets monthly to produce the official revenue forecast. Members: CRO, CFO, VP Revenue Operations, VP Customer Success, and the Head of FP&A.; Process: (1) Sales pipeline-based forecast (CRO presents the bottoms-up pipeline-weighted forecast), (2) CS renewal forecast (VP CS presents the retention and expansion forecast), (3) Statistical model forecast (FP&A; presents the time-series model forecast), (4) Reconciliation (the committee reconciles the three approaches and sets the official forecast). Write the charter, the roles, and the meeting format.

#### #0746 — AI Cost per Unit Reporting

Write the AI cost per unit reporting framework. As the company deploys more AI features, the cost of delivering those features (token costs, inference compute) must be tracked as unit costs. The framework should: define the unit for each AI feature (cost per search query, cost per document summary, cost per customer support interaction), track the unit cost trend monthly (is AI getting cheaper as we optimize, or more expensive as usage grows?), compare unit cost to the value delivered (cost per query is \$0.002; the feature is included in a \$50/month product — is this sustainable?), and set cost reduction targets for each AI feature.

#### #0747 — Annual Report Preparation

Write the annual report preparation timeline and content guide for the board and management team. The annual report (investor letter + audited financials) should: tell a compelling story about the year (not just list accomplishments — tell the narrative of what we set out to do and what we achieved), present the audited financials in a readable format, address the company's key risks honestly, and give investors confidence in the management team and the strategic direction. Timeline: audit completion (Month 3), annual report draft (Month 4), CEO and board review (Month 4-5), distribution (Month 5). Write the content guide.

#### #0748 — Performance Attribution Report

Write the performance attribution report that connects business outcomes to their strategic drivers. The report answers: 'Why did ARR grow 35% this year?' Attribution model: of the \$20M net new ARR, how much came from: new logo acquisition vs. expansion of existing customers vs. pricing, which customer segments drove growth (enterprise grew 40%, mid-market grew 30%, SMB grew 20% — what does this tell us?), which marketing channels contributed, which product lines grew, and which geographies? The attribution report is the CEO's primary tool for understanding the business and communicating to investors.

#### #0749 — Reporting Automation ROI

Write the ROI analysis for reporting automation investments. Current state: the finance and analytics team spends 120 hours/month on manual reporting at an average fully-loaded cost of \$75/hour = \$9,000/month = \$108,000/year. Automation investment: \$150K in tooling + 6 months of implementation time. The automation should: reduce manual reporting time by 80% (saving \$86,400/year), improve data accuracy (fewer manual errors — estimate 15% reduction in error-related rework), improve data freshness (reports update daily instead of weekly), and give business users self-service access (reducing 40 hours/month of data requests from the analytics team). Write the full ROI model.

#### #0750 — Quarterly Earnings Preparation

Write the quarterly earnings preparation guide for a company considering a public offering. The guide should help the management team prepare for: the earnings press release (financial results, business highlights, guidance), the management letter to shareholders (the CEO's narrative of the quarter), the Q&A; preparation (the 20 questions analysts will ask), the financial data room (supplemental financial data that analysts want), and the rehearsal process (at least 2 full rehearsals before the earnings call). Write the timeline (preparation starts 3 weeks before the call) and the role assignments.

#### #0751 — Customer Revenue Retention Analysis

Write the customer revenue retention analysis methodology. Retention analysis answers: how much of last year's ARR is still with us? The analysis should calculate: gross revenue retention by cohort (what % of the ARR signed in each quarter is still active?), net revenue retention by cohort (including expansion, what is the ARR value of each cohort today vs. at signing?), churn concentration (which customer segments have the highest churn?), and the early warning signals for churn (which customer behaviors predict churn 90 days in advance?). Write the full methodology and the visualization format.

### #0752 — Reporting Layer Architecture

Write the reporting layer architecture for a company with fragmented data. The architecture should have 3 layers: (1) Source layer (data from CRM, billing, product, HR, and financial systems — ingested via API or batch extract), (2) Transformation layer (data warehouse where data is cleaned, joined, and modeled — the single source of truth), (3) Presentation layer (BI tool dashboards and self-service queries that connect to the transformation layer). Write the technology selection criteria for each layer, the data governance requirements, and the team required to build and maintain the architecture.

### #0753 — Strategic Metrics Cascade

Write the strategic metrics cascade — how company-level OKRs and strategic goals translate into the metrics tracked at each organizational level. The cascade should show: company level (3-5 metrics the CEO and board track), function level (each function head tracks 5-8 metrics aligned to their contribution to company goals), team level (each team tracks 3-5 metrics aligned to their function's goals), and individual level (ICs understand how their work connects to team metrics). Write the cascade for the Revenue function: company metric (ARR growth) → function metric (new bookings + NRR) → team metric (pipeline coverage, win rate, renewal forecast) → individual metric (quota attainment, account health).

### #0754 — Data Storytelling Workshop

Write the data storytelling workshop curriculum for the executive team. The workshop teaches executives how to present data persuasively — turning numbers into insights and insights into action. Topics: (1) The BLUF principle (bottom line up front — lead with the insight, not the data), (2) Chart selection (choosing the right visualization for the message), (3) Data annotation (adding narrative to charts so they communicate without a presenter), (4) The 'so what' discipline (every data point must answer 'so what?' before it makes the presentation), (5) Audience calibration (what does a board vs. a customer vs. an employee need from the same data?). Duration: 4 hours. Include 3 hands-on exercises.

### #0755 — Metrics Hygiene Standards

Write the metrics hygiene standards for the company. Metrics hygiene problems: metrics that measure the wrong thing (vanity metrics), metrics calculated differently by different teams (inconsistent definitions), metrics with no ownership (no one knows if the data is right), and metrics that are never questioned (stale metrics from 3 years ago that no longer reflect the business). The standards should: require every metric to have a formal definition, an owner, a data source, and a review date, establish a monthly 'metric health check' process, and create a sunset process for obsolete metrics.

### #0756 — KPI Tree Design

Write the KPI tree design for a \$100M ARR SaaS company. A KPI tree shows how high-level metrics decompose into underlying drivers. The top-level KPI (ARR growth) decomposes into: new logo ARR (driven by pipeline × win rate × average ACV) and net expansion ARR (driven by expansion rate – churn rate). Each driver decomposes further: pipeline is driven by marketing qualified leads × SQL conversion rate; win rate is driven by competitive win rate and deal qualification quality. Write the full KPI tree and the ownership assignment for each metric.

### #0757 — AI Dashboard Design Principles

Write the AI dashboard design principles for business intelligence tools that use AI to generate insights. Principles: (1) AI insights should be labeled as AI-generated (users must know when a narrative is AI-written), (2) Every AI insight should link to the underlying data (never trust an AI summary without seeing the source data), (3) AI confidence levels should be visible (is the AI 90% confident in this insight, or 60%?), (4) AI dashboards should surface anomalies, not just trends (AI's value is in catching what humans miss), and (5) AI dashboards should require review before distribution (no AI-generated report should go to a customer or investor without human review).

### #0758 — Reporting Latency Reduction

Write the reporting latency reduction plan. Current state: the weekly executive report is published every Monday morning with Friday's data — a 3-day lag. In a fast-moving business, 3-day-old data can mislead decisions. The reduction plan: identify which data sources cause the lag (usually manual processes and slow ERP queries), automate the data refresh for each source, reduce the report to a Tuesday morning (2-day lag) in Phase 1, then to a same-day refresh in Phase 2. Write the technical approach, the investment, and the timeline.

### #0759 — Strategic Cohort Analysis

Write the strategic cohort analysis framework. A cohort analysis tracks groups of customers acquired in the same period to understand retention and expansion patterns over time. The strategic insights from cohort analysis: are more recent acquisition cohorts retaining better or worse than older cohorts (improving product-market fit), do customers acquired from specific channels retain better, and at what tenure does expansion typically happen? Write the cohort analysis methodology, the visualization format (retention curves), and the strategic conclusions a CEO should draw from each pattern.

### #0760 — Data Team Operational Model

Write the data team operational model for a 6-person data team supporting a 300-person company. The team receives 200 data requests per month but can only fulfill 60 with high quality. The operational model should: categorize requests by type (self-service possible, simple analysis, complex analysis, data infrastructure), implement a self-service analytics layer (reduces the 100 simple requests that users could answer themselves), create a request prioritization framework (requests tied to company OKRs are prioritized), establish SLAs by request type (complex analyses: 5 business days; simple queries: 1 business day), and measure team efficiency (% of requests fulfilled, average cycle time).

### #0761 — NRR Decomposition Analysis

Write the NRR decomposition analysis methodology. NRR (Net Revenue Retention) is the most important metric in SaaS but is often reported as a single number without understanding its components. The decomposition should separate NRR into: gross retention contribution (what % of ARR was retained with no change in contract value?), expansion contribution (what % of ARR came from existing customers growing their contracts?), and contraction contribution (what % of ARR was lost to contract downsizing without full churn?). Write the decomposition methodology and the strategic conclusions from each pattern.

## SECTION 08

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85 unique prompts for senior executives

### #0762 — CEO All-Hands Preparation — CREATE Format

Context: You are the Chief of Staff preparing the CEO's all-hands meeting. The meeting is in 3 days, 500 employees attending (200 remote). This is the first all-hands since a difficult Q3 — revenue missed by 12%, 2 senior leaders departed, and AI uncertainty is affecting the team's confidence in their roles. The CEO wants to be honest, not defensive, and rebuild confidence in the direction. Request: Write the full all-hands agenda and the CEO's talking points for each section. The meeting is 60 minutes. Sections: welcome and acknowledgment of Q3 (honest, 5 min), what we got right (specific, 8 min), what we got wrong and why (no excuses, 8 min), the plan for Q4 and the year ahead (specific, 15 min), AI and your roles (address the fear directly, 10 min), Q&A; (15 min), close (3 min). Adjustments: The CEO is not a politician. The talking points should feel like a real human being speaking, not corporate communications. Include the actual language for the 'what we got wrong' section — this is where most CEOs hedge and lose credibility. Tone: Honest, direct, warm. The audience can tell when they are being managed.

### #0763 — Board Meeting Pre-Read — One-Shot

Write the pre-read preparation guide for an executive who is presenting at a board meeting for the first time. They are the VP of Product and they will present the product roadmap and strategy for 15 minutes. Example of effective board presentation preparation: 'The board has read your slides. Do not read them back at the board. Your job in 15 minutes is to: (1) bring the most important insight in the first 90 seconds, (2) give them the context to ask good questions, (3) make a clear ask or decision request. What boards notice: Do you know your numbers cold? Do you pause and think or do you guess? When challenged, do you get defensive or thoughtful? Can you simplify? Boards are worried by executives who can't simplify.' Write the full preparation guide covering: how to design the presentation (what to include, what to leave for appendix), how to prepare for tough questions (prepare 10 questions, have crisp answers), what to do in the first 60 seconds, and the most common first-time board presentation mistakes to avoid.

### #0764 — Decision Memo Framework — Few-Shot

Executives should replace long PowerPoint decks with decision memos for most operating decisions. Write the decision memo writing guide. Examples of strong decision memos: Amazon-style: 'Start with the conclusion. Use a 6-page maximum. Section headers: Background (1 paragraph), Decision Required (1 sentence), Options Considered (table format), Recommendation with Rationale (1-2 pages), Implementation Plan (1 page), Appendix (data, analysis). The document is read silently in the first 20 minutes of the meeting.' McKinsey-style: 'The SCQA format: Situation (what is happening), Complication (why status quo is unacceptable), Question (what decision is needed), Answer (the recommendation). Every sentence should either add new information or sharpen the argument. Cut sentences that just connect other sentences.' Write the decision memo writing guide for a company transitioning from PowerPoint-heavy culture to memo-driven decision making. Include: the template, the writing principles, training content for managers, and a worked example comparing a before (poorly written memo) and after (well-written memo) for the same decision.

### #0765 — AI-Powered Meeting Summary System — Chain-of-Thought

I want to design a meeting summary system that uses AI to transform raw meeting transcripts into actionable summaries. Walk me through how to design this properly. Step 1: What should a great meeting summary include that most meeting summaries miss? Step 2: How do I design the AI prompt that generates the summary? What instructions produce useful output vs. generic output? Step 3: How do I handle different meeting types (decision meeting vs. brainstorming vs. update vs. 1:1) — should they have different summary formats? Step 4: How do I ensure accuracy? Transcripts have errors, context is missing. What's the review process? Step 5: How do I distribute summaries and track action item completion? Step 6: What metrics tell me the system is working? Work through each step, then give me the complete prompt template to use with any meeting transcript.

### #0766 — Weekly Leadership Team Meeting Design — Role-Based

Act as an organizational effectiveness consultant who has redesigned leadership team operating models for 50+ companies. My 8-person leadership team meets weekly for 2 hours. The meetings are described by participants as 'a waste of time' — status updates that could be emails, no real decisions made, CEO dominates discussion. Attendance is declining. Redesign the meeting: 1. What is the purpose of a weekly leadership team meeting? (Define it precisely before designing.) 2. What should be in the meeting vs. sent as async updates vs. handled bilaterally? 3. What is the ideal meeting structure for a high-performing leadership team? 4. How do you prevent the CEO from dominating (without making it awkward)? 5. How do you make decisions actually happen in the meeting vs. being deferred? 6. What facilitation approaches make a difference? 7. Give me the redesigned 90-minute agenda with facilitation notes.

### #0767 — Deep Work Schedule Design

Design a 'deep work' schedule for a VP-level executive who is in meetings 70% of the time. The schedule should: protect at least 2 hours of uninterrupted thinking time daily, batch meetings on 2-3 days of the week, create a morning routine that enables focused work before meetings start, design an end-of-day shutdown ritual that actually allows cognitive disengagement, and handle the political reality that a VP cannot simply block calendar and ignore requests. Include the template schedule and the internal communication to set expectations with the team.

### #0768 — Board Pre-Read Preparation System

Design a system for preparing board meeting pre-reads on time, every time. The system should cover: the 8-week calendar working back from the board meeting date, the template for each board pack section, the review process (draft → CFO review → CEO review → legal review → distribution), how to handle sections that are consistently late, quality standards for what goes into the board pack, and how to brief directors who want additional context before the meeting. Include a pre-distribution checklist.

### #0769 — Executive Briefing Format

Write the standard format for executive briefings — the 1-2 page documents used to brief a CEO or board member before an external meeting, media appearance, or customer visit. The format should include: context (who is the meeting with, what do they care about), objective (what do we want to achieve in this meeting), background (what they need to know that they might not), key messages (3 points we want them to leave with), likely questions and prepared answers, talking points for the opening, and a brief on the individual (if a person — their priorities, relationship history, communication style). Include a worked example.

### #0770 — Strategic Planning Retreat Facilitation Guide

Write the facilitation guide for a 2-day executive team strategic planning retreat. Day 1: Environmental scan (market trends, competitive analysis, customer insights, internal strengths and gaps) — facilitated by external facilitator. Day 2: Strategic choices (where to play, how to win, priorities for next 12 months, resource allocation). Include: the preparation (what data is prepared in advance), the facilitation techniques for each session (not just agenda times), how to handle disagreement among the leadership team, how to ensure follow-through on commitments made in the retreat, and what to communicate to the company after.

### #0771 — Meeting-Free Wednesday Policy

Write the 'Meeting-Free Wednesday' policy for a 300-person company. The policy should cover: what the policy is and why (the research on deep work, the signal from high-performing companies like Amazon), what counts as a meeting exception (genuine crisis only), how to handle clients or external parties who request Wednesday meetings, how managers should use Wednesdays (model the behavior), what the company commits to in return (fewer total meetings, better prepared meetings on other days), and how to evaluate whether the policy is working. Include a communication plan for rolling it out company-wide.

### #0772 — CEO Communication Calendar

Design the CEO's annual communication calendar. The calendar should plan: (1) all-company communications (quarterly all-hands, year-end letter, milestone announcements), (2) external communications (investor letters, analyst briefings, media appearances, speaking engagements), (3) customer communications (strategic account visits, customer conference keynote, advisory board meetings), (4) employee communications (skip-level lunches, CEO office hours, new hire orientations), and (5) board and governance communications. For each type, note: the format, frequency, owner (CEO direct vs. comms team drafts, CEO edits), and the primary objective.

### #0773 — Decision Log System

Design the decision log system for a fast-moving company where decisions made in leadership meetings are being forgotten or re-litigated. The system should: define what types of decisions are logged (strategic and significant operational, not every tactical call), the decision log format (context, options considered, decision made, rationale, owner, date, review date), the tool to use (not a complex system — Notion or Confluence), who maintains the log, the monthly decision review process (how do you check if decisions are being executed?), and how the log prevents the common failure of 'decide, forget, redecide.'

### #0774 — Executive Preparation for Media Interview

Write the preparation guide for a CEO preparing for a live media interview with a financial journalist. The interview is about the company's recent AI product launch. The guide should cover: the 3 messages to hammer home regardless of the question asked, the bridging technique (how to answer the question that was asked while delivering the message you want to give), how to handle a hostile question (the AI ethics challenge question they are definitely going to ask), what NOT to say (the 5 phrases that create headlines for the wrong reasons), and how to practice (mock interview with a colleague playing adversarial journalist). Include sample Q&A; for 8 likely questions.

### #0775 — Strategic Planning Offsite Facilitation

Design the 2-day strategic planning offsite for a 12-person leadership team. Day 1 focus: where are we now (honest assessment) and where could we be (opportunity exploration). Day 2 focus: strategic choices and resource allocation. Key design principles: no PowerPoint on day 1 (conversation-based), diverse input methods (solo reflection, small group, full team), pre-work to reduce the time spent on context-setting during the offsite, and explicit decision points (what specific choices will be made by end of day 2?). Include: the pre-work package, the day-by-day agenda, facilitation techniques for key sessions, and the post-offsite follow-up process.

### #0776 — Crisis Communication Protocol

Write the crisis communication protocol for a company that has just experienced a significant data breach affecting 50,000 customer records. The protocol covers: the immediate response (first 4 hours — who does what), internal communication (what do employees need to know and when?), customer notification (legal requirements: GDPR notification within 72 hours, CCPA notification within 45 days), the public statement (what to say, what not to say), regulator notification requirements, media inquiry management, executive communication guidelines (who speaks, who does not), the 30-day post-crisis review process, and the insurance claim process.

### #0777 — Leadership Team Offsite Retrospective

Write the retrospective template for use at the end of a leadership team offsite. The retrospective should help the team reflect on: the quality of the strategic discussions (were the right questions asked?), the decisions made (are they specific enough to execute?), the team dynamics (did everyone's voice get heard? was any topic avoided?), what commitments were made (are they specific and owned?), and what follow-up the team is committing to in the next 30 days. The retrospective takes 45 minutes, is facilitated by one team member on rotation, and produces a 1-page close-out document circulated to all attendees.

#### #0778 — Executive Team Norms Document

Write the leadership team operating norms document. This document captures the explicit agreements the leadership team has made about how they work together. It should cover: decision-making norms (how are decisions made — consensus, consent, or CEO decides?), meeting norms (come prepared, phones away, speak your view, disagree directly), conflict resolution norms (address disagreements in the room, not in hallways), information sharing norms (what is shared with teams vs. held at leadership level), and accountability norms (we hold each other accountable, no sacred cows). This document is written by the team, for the team — not imposed from outside.

#### #0779 — Monthly Leadership Newsletter

Design the monthly leadership newsletter template for a VP-level audience. The newsletter should be written by the CEO or Chief of Staff and cover: one strategic insight from the month (what the CEO is thinking about), one thing the company did really well (specific, with names), one thing to improve (direct, not softened), one external reading recommendation (market insight, competitive intelligence, thought leadership), one metric the leadership team should internalize (and the story behind it), and one personal note from the CEO (makes it feel human). Max 500 words. Should take 3 minutes to read.

#### #0780 — Priorities Setting Session Design

Design the priorities setting session for the start of each quarter. The 90-minute session for the leadership team should: review and close out last quarter's priorities (what was done, what was not, what carries over), surface new priorities from the environment (market changes, customer feedback, internal issues), apply a prioritization filter (what is urgent + important vs. just urgent?), agree on the top 5 company priorities for the quarter, and cascade communication to all managers within 48 hours. Include the facilitation guide, the prioritization filter exercise, and the cascade communication template.

#### #0781 — Key Person Risk Mitigation

Write the key person risk mitigation plan for the CTO. The company's CTO is the sole architect of the entire technology platform — no one else fully understands the architecture. This is a material risk disclosed to investors. The mitigation plan should cover: knowledge transfer requirements (architecture documentation, system diagrams, decision logs), the engineering team development plan (which engineers to develop as successor candidates), the hiring plan (bring on a VP Engineering to create an organizational buffer), the retention strategy (equity refresh, title, scope expansion), and the emergency succession plan if the CTO leaves suddenly before mitigation is complete.

#### #0782 — 1:1 Meeting Design for Senior Leaders

Write the 1:1 meeting design guide for senior leaders (VP+). The guide should challenge the default 30-minute catch-up format. Instead, define: the purpose of a 1:1 (it's the direct report's meeting, not the manager's), the right frequency (weekly for early-tenure relationships, bi-weekly for settled relationships), the preparation required from both parties, the format that works best (standing agenda vs. flexible vs. walking meeting), how to use 1:1s for development conversations rather than status updates, and how to measure 1:1 effectiveness (does the direct report feel supported and challenged?).

#### #0783 — Crisis Scenario Tabletop Exercise

Write the crisis management tabletop exercise for the executive team. The scenario: a major AI system failure that causes incorrect outputs to be sent to 10,000 customers simultaneously. The exercise should: describe the scenario injection (what happens, when, how the company learns about it), the first 30-minute response phase (who does what?), the 2-hour decision phase (do you take the system down? how do you communicate?), the 24-hour recovery phase (customer communication, regulatory notification, root cause investigation), and the debrief questions (what worked, what failed, what would we do differently?). Duration: 3 hours.

### #0784 — Email Communication Policy

Write the email communication policy for a company that has a culture of excessive email. Symptoms: average employee receives 150+ emails/day, response time expectations are 24/7, executives are CCed on everything. The policy should: define appropriate email usage (vs. Slack for quick communication, vs. a decision memo for complex decisions), set response time norms by urgency level, establish norms on CC'ing (is the CEO's inbox a CC? No.), set expectations about weekend and evening email, and propose a 'no email Friday' experiment. Include how to roll out the policy and enforce it at the manager level.

### #0785 — Executive Coaching Program Design

Design the executive coaching program for VP-level leaders. The program should: match each executive with an external coach (criteria for coach selection), define the program structure (bi-weekly sessions, 6-month minimum commitment), establish the coaching agreement between executive, coach, and HR (what is confidential? what is not?), integrate coaching with 360 feedback (coaches review 360 results and use them as development input), and measure ROI (how do we know coaching is working?). Budget: \$15K per executive per year. Include the brief each executive completes before their first coaching session.

### #0786 — Meeting Effectiveness Audit

Write the meeting effectiveness audit process for a company where leadership believes too much time is spent in meetings. The audit should: collect data on meeting volume and type across the organization (calendar analysis, meeting purpose survey), categorize meetings by value (decision meetings, coordination meetings, information sharing meetings, unnecessary meetings), calculate the total cost of meetings (number of participants × average hourly rate × duration), identify the top 3 meeting types that should be eliminated or replaced, and design the experiment to test a meeting reduction initiative. Include the survey instrument and the analysis methodology.

### #0787 — Strategic Communication Planning

Write the strategic communication plan for a significant company change: moving from 100% US-based to a global company with 4 international offices opening simultaneously. The communication plan should cover: the audiences (all employees, leadership team, board, customers, media, regulators), the key messages for each audience, the communication timeline (announcement sequence — board first, then leadership, then all staff, then external), the communication channels (all-hands, manager cascades, press release, customer letter), the FAQ preparation, and the 30-day post-announcement communication plan (sustaining momentum, addressing concerns).

### #0788 — Decision Authority Matrix for Remote Teams

Write the decision authority matrix for a fully remote company to reduce decision bottlenecks. The current situation: everything requires the CEO's approval, creating a 48-hour decision queue that slows down the business. The matrix should: categorize decisions by type (operational, financial, strategic, people), define the right decision-maker at each level (individual contributors can decide X, managers can decide Y, VPs can decide Z, CEO decides W), establish the escalation criteria (when does a decision exceed authority?), and create the documentation requirement (what decisions need to be recorded in the decision log vs. just executed?).

### #0789 — Post-Acquisition Integration Meeting Framework

Write the meeting framework for the first 90 days of post-acquisition integration. Week 1: joint leadership team meeting (relationship building, integration governance established). Weeks 2-4: functional workstream kick-offs (HR integration, IT integration, customer communications, financial consolidation). Monthly: integration steering committee (status of all workstreams, issues requiring executive decision). Weekly: integration workstream leads (cross-workstream coordination, blocker removal). Include the agenda template for each meeting type, the decision-making authority, and the escalation path for integration issues that cannot be resolved at the workstream level.

### #0790 — Inbox Zero System for Executives

Write the inbox zero system for a C-suite executive who receives 300+ emails per day. The system should cover: the triage process (process email in 2 daily blocks, not continuously), the 4-action system (do, delegate, defer, delete), how to use filters and rules to pre-sort emails, the role of an EA in email management, how to communicate email management norms to the organization (it's ok to not respond immediately), and how to manage the transition from 'always on email' culture without creating the perception of disengagement. Include the week-1 implementation plan.

### #0791 — Leadership Communication During Uncertainty

Write the leader's communication guide for periods of significant uncertainty — an acquisition process, a restructuring, or a major strategic pivot. The guide should cover: what to communicate when you cannot share all the information (the 'transparent about uncertainty' approach), how to maintain team confidence without false positivity, the communication cadence (more frequent, shorter updates beat infrequent, longer ones), how to address the 'what does this mean for me?' question that every employee is asking, and how to manage your own anxiety so it doesn't transmit to the team. Include 3 example communication scripts for different stages of uncertainty.

### #0792 — Deep Work Scheduling Policy

Write the company deep work scheduling policy. Research: knowledge workers need 4-hour uninterrupted blocks for deep thinking. Current problem: the company's calendar culture has executives in meetings 6-8 hours/day with no time for strategic thinking. The policy should: block 2 hours daily as 'deep work' time (no meetings scheduled), create a 'meeting-light Tuesday' experiment for one team, set the maximum meetings per day at the VP level (no more than 4), and define what meeting types can be replaced with asynchronous communication. Include the change management plan and the opt-out process.

### #0793 — All-Hands Meeting Redesign

Write the redesign plan for the company all-hands meeting. Current state: monthly 2-hour all-hands, attendance declining, low engagement, dominated by presentation slides. Redesigned format: 45 minutes maximum, 3 sections: CEO update (10 min — 3 things that mattered this month), team spotlight (15 min — a cross-functional team shares a win or a learning), and Q&A; (20 min — pre-submitted + live questions, CEO answers honestly). Async pre-read replaces most of the presentation content. Measurement: attendance rate, engagement (questions submitted), and satisfaction survey score.

### #0794 — Briefing Document Standard

Write the briefing document standard for executive meetings. Every external meeting (customer, investor, partner, media) should have a 1-page briefing document prepared by a chief of staff or EA. The briefing should include: who you're meeting (name, role, recent company news), meeting objective (what do you want to achieve?), their context (what do they care about, recent interactions with the company), the 3 most important things to know, topics to avoid, and the recommended ask. Write the template and the 24-hour preparation requirement.

### #0795 — Strategic Planning Process Design

Write the annual strategic planning process for a 300-person company. The process should: start 4 months before the fiscal year (not 6 weeks before like most companies), use a bottom-up input phase (teams identify their key opportunities and constraints), be synthesized by a small strategy team (3-5 people, not 50 managers creating 50 slide decks), produce a 3-year strategic direction and a 1-year operating plan, and be approved by the board at the September board meeting. Write the process timeline, the roles and responsibilities, the workshop facilitation approach, and the planning outputs.

### #0796 — Executive Assistant Partnership Guide

Write the partnership guide for executives and their EAs. The EA is the executive's force multiplier. The guide should cover: the access the EA needs (calendar authority, email access, briefing documentation), the communication protocol (EA manages all scheduling, executive does not book their own meetings), the EA's role in information flow (EA is aware of all incoming requests and routes appropriately), the EA's role in meeting prep (briefing documents for all external meetings), and how to build the EA-executive relationship (regular 1:1, clear communication about priorities). Write the EA onboarding checklist.

### #0797 — Crisis Communication Template Library

Write the crisis communication template library. Pre-written templates speed response during a crisis (every minute spent writing under pressure increases error risk). Templates needed: (1) Customer notification: product outage, (2) Customer notification: data breach, (3) Employee notification: unexpected leadership departure, (4) Media statement: operational crisis, (5) Investor notification: material negative event, (6) Regulatory notification: compliance breach. Each template should have the structure pre-filled with guidance on what to include, with [PLACEHOLDER] text for situation-specific details. Include the decision tree for which template to use.

### #0798 — Leadership Team Charter

Write the leadership team charter. The charter defines how the executive team operates. Sections: Purpose (why does this team exist?), Membership (who is on the team and what role do they play?), Decision rights (what does this team decide collectively vs. individually?), Meeting structure (when and how do we meet?), Communication norms (how do we communicate between meetings?), Behavioral commitments (what behaviors make this team effective?), and Accountability (how do we hold each other accountable?). The charter should be a living document, reviewed annually and updated when the team membership changes.

### #0799 — Asynchronous Communication Guide

Write the asynchronous communication guide for a remote-first company. The guide should: define the communication principle ('write it down' culture), establish the right tool for each communication type (quick questions → Slack, complex decisions → written memo, sensitive conversations → video call), set response time expectations (urgent: 2 hours; standard: 24 hours; FYI: no response needed), create the meeting replacement toolkit (Loom for video updates, Notion for collaborative documents, surveys for group input), and address the common async failure mode: asynchronous communication creating more confusion than synchronous discussion would have.

### #0800 — Meeting Room Booking Policy

Write the meeting room booking policy for a hybrid office. Problems to solve: meeting rooms are booked but unoccupied (ghost meetings), small groups are booking large rooms, and remote participants are dialing into rooms without video equipment. Policy: rooms can be booked no more than 2 weeks in advance (prevents calendar squatting), unoccupied rooms are released after 10 minutes (via booking system sensor), rooms require video conferencing equipment for any meeting with remote participants, and meeting rooms are categorized by size (2-person booths, 4-person meeting rooms, 10-person conference rooms) with booking rules tied to expected attendance.

### #0801 — Knowledge Transfer Protocol

Write the knowledge transfer protocol for employees leaving the company. Standard offboarding focuses on access revocation; good offboarding includes knowledge transfer. The protocol should: require a 2-week knowledge transfer period for all departing employees (except in termination cases), identify the 5 knowledge areas the employee owns (systems access, vendor relationships, in-progress projects, undocumented processes, and stakeholder relationships), assign a knowledge recipient for each area, create documentation artifacts (process guides, contact lists, project status updates), and verify that the knowledge transfer is complete before the final day.

### #0802 — Presentation Communication Standards

Write the presentation communication standards for internal executive presentations. Common failures: too many slides, too much text, data without insight. Standards: maximum 10 slides for a 30-minute presentation, each slide makes one point (not 5), every data point must answer 'so what?' before inclusion, use the 'BLUF' format (Bottom Line Up Front — state the conclusion first, then support it), no reading slides aloud (slides are prompts, not scripts), and always end with a clear ask (decide, approve, support, or information only). Include the slide structure template and 3 before/after slide examples.

### #0803 — Executive Peer Learning Program

Design the executive peer learning program. External executive peer learning (CEO peer networks, YPO, industry councils) is valuable but expensive. The internal peer learning program creates similar value at lower cost. The program should: meet monthly for 2 hours (breakfast or lunch format), rotate facilitation among the 8 participants (C-suite and senior VPs), use a 3-part format: one participant presents a challenge they're facing, the group provides perspectives, and the presenter commits to one action, build trust through a confidentiality agreement (what's said in the group stays in the group), and measure impact through quarterly retrospectives.

### #0804 — Retreat Facilitation Guide

Write the retreat facilitation guide for an executive team offsite. The offsite has 2 goals: relationship building and strategic alignment. Day 1: relationship focus (team building activity, 'working styles' session where each executive shares how they work best, dinner with no agenda). Day 2: strategic focus (future scenarios workshop, key decisions that need the full executive team, and commitment to 3 shared priorities). Facilitation principles: the CEO should not dominate (coach them to ask questions, not give answers), create space for dissent (the best retreats surface real disagreements), and end with written commitments.

### #0805 — Decision Log System

Write the decision log system. Every major decision made by the leadership team should be recorded: the decision, the date, the decision-maker(s), the context and options considered, the rationale for the chosen option, the expected outcome, and the review date (when will this decision be evaluated?). The decision log serves 3 purposes: organizational memory (new team members understand why things are the way they are), accountability (decisions have owners), and learning (reviewing past decisions improves future decision quality). Write the decision log format, the storage location, and the review cadence.

### #0806 — Team Productivity Experiment

Write the 90-day team productivity experiment design for a VP who wants to improve her team's output without increasing headcount. The experiment should test 3 interventions: (1) Remove 2 recurring meetings from the weekly calendar (are those decisions made elsewhere?), (2) Introduce 'focus Fridays' (no internal meetings), (3) Implement a daily async standup in Slack (replace the 30-minute daily standup meeting). Measure before and after: project delivery rate, team satisfaction score, and manager's perception of decision quality. Write the hypothesis, the measurement plan, and the decision criteria for making the changes permanent.

### #0807 — Communication Audit Process

Write the communication audit process for a company that suspects information is not flowing effectively. Symptoms: employees say 'no one tells us anything,' managers say 'I don't know why my team doesn't understand our direction.' The audit should: survey employees on information access (do you get the information you need to do your job?), audit the communication channels (how many Slack channels exist and are they well-organized?), map the communication cascade (does important information from the CEO actually reach ICs?), and identify the specific information gaps (what information is missing?). The audit produces a communication improvement plan.

### #0808 — Executive Onboarding Program

Write the executive onboarding program for a newly hired Chief Revenue Officer. The first 90 days are critical: the CRO needs to learn the business deeply before making changes. The program should: Week 1 (listen and meet): meet all direct reports, all key customers, and the founding team; Week 2-4 (learn and diagnose): understand the sales process, pipeline, team capability, and competitive environment; Month 2 (assess and hypothesize): share initial observations with CEO, test hypotheses with data; Month 3 (plan and begin): present 6-month plan to CEO and board, begin implementing the 2-3 highest-priority changes. Include a reading list and the internal briefing documents the CRO should receive.

### #0809 — AI Meeting Productivity Tools

Write the AI meeting productivity toolkit guide. The toolkit should cover 4 tools: (1) Pre-meeting AI briefing generator (inputs: attendee names, meeting purpose → outputs: company research, talking points, questions to ask), (2) Real-time transcription and notes (Otter.ai, Fireflies — capture decisions and actions without a human notetaker), (3) Post-meeting AI summary (auto-generates meeting summary and action items from transcript), (4) Follow-up email generator (drafts the post-meeting email based on the summary and action items). Write the adoption guide, the privacy considerations for recording meetings, and the workflow that saves 2+ hours per executive per week.

### #0810 — Operating Norms for Hybrid Team

Write the operating norms for a hybrid team (5 in-office, 8 remote). The norms should address the most common hybrid team failure modes: remote employees feeling like second-class citizens, in-office employees forming a shadow communications channel, and meetings that are optimized for in-room participants. Norms: all meetings are run as if everyone is remote (cameras on, equal participation), all meeting artifacts (notes, decisions, recordings) are published asynchronously within 24 hours, no side conversations in the office that exclude remote team members on topics the remote team would want to know about, and the team uses a shared 'team room' Slack channel as the primary communication channel.

### #0811 — Conflict Resolution Protocol

Write the conflict resolution protocol for the executive team. Conflict between C-suite executives is common and often unresolved — it lingers and creates organizational confusion. The protocol: level 1 (direct conversation within 48 hours — the two executives talk privately before involving others), level 2 (structured mediation with CEO within 1 week if level 1 fails), level 3 (full executive team discussion if the conflict affects team effectiveness), and escalation (board chair involvement if the conflict cannot be resolved at the executive team level). Include the preparation guide for each level.

### #0812 — Information Security Communication Policy

Write the information security communication policy for executives. C-suite executives are the most common target of phishing and social engineering attacks. The policy should: define what constitutes sensitive information that should not be communicated via email (wire transfers, M&A; details, personal data, board information), specify which communication tools are approved for sensitive information (end-to-end encrypted tools: Signal for personal-sensitive, enterprise secure messaging for corporate-sensitive), set training requirements (annual security awareness training, quarterly phishing simulations), and define the reporting process for suspected social engineering attempts.

### #0813 — Board Preparation Checklist

Write the board meeting preparation checklist for the management team. The checklist covers the 4 weeks before a board meeting: Week -4 (confirm agenda with board chair, identify which executives present each topic), Week -3 (collect data and draft the board package), Week -2 (CEO review and editing of the board package, legal review if required), Week -1 (distribute the board package, confirm logistics, prepare the executive team for board questions). Include the standard sections required in every board package and the format specifications (max 50 pages, 12pt font, no more than 5 appendices).

### #0814 — Pre-Mortem Workshop

Write the pre-mortem workshop format for major decisions. A pre-mortem inverts the retrospective: instead of asking 'what went wrong?' after a failure, it asks 'imagine it's 12 months from now and this project has failed — what went wrong?' The workshop format: 45 minutes, the team individually writes down every failure scenario they can imagine (10 minutes), groups share their scenarios without attribution (20 minutes), the team identifies the top 5 most likely failure modes, and the project plan is revised to address the top 3. Write the facilitation guide and the post-workshop documentation.

### #0815 — OKR Review Meeting Facilitation

Write the facilitation guide for the quarterly OKR review all-hands meeting. This is different from the OKR planning meeting — it reviews what happened. The meeting should: be honest (no defensive explanations of misses), be celebratory (genuine recognition for achievements), be forward-looking (what does this tell us about the next quarter?), and be concise (45 minutes maximum — the full OKR history is in the written report). Include the CEO's opening script, the structure for each functional team's OKR review, and the closing segment.

### #0816 — AI Policy Communication Guide

Write the communication guide for introducing the company's AI usage policy to all employees. The policy governs which AI tools employees can use, what data can be shared with AI tools, and how AI outputs should be disclosed. The communication should: not be a policy dump (employees tune out policy documents), use concrete examples of what is and isn't allowed, address the most common questions (Can I use ChatGPT? Can I put customer data into AI? Do I have to tell people when I use AI?), and create a resource for employees to check if a specific AI use is permitted. Include the FAQ document and the manager Q&A guide.

### #0817 — Leadership Development Budget Allocation

Write the leadership development budget allocation framework. The company has \$500K for leadership development. The framework should: allocate by level (executives: external coaching and leadership programs; managers: internal training + external workshops; high-potential ICs: development stretch assignments + courses), prioritize development that addresses the company's specific leadership capability gaps (identified from 360 feedback data), balance individual development with team-level development, and require ROI reporting (at year end, what leadership improvements can we attribute to this investment?). Write the allocation recommendation and the measurement framework.

### #0818 — Strategic Initiative Governance

Write the strategic initiative governance framework for a company running 7 simultaneous strategic initiatives. The problem: no one knows the status of all 7 initiatives, resources are being pulled in multiple directions, and some initiatives have no clear owner. The governance framework should: appoint an initiative portfolio owner (COO), establish a steering committee for initiatives above \$5M, create a monthly initiative review (status, resources, risks, decisions needed), define the initiative shutdown criteria (the courage to stop an initiative that isn't working), and publish a monthly initiative dashboard for the full leadership team.

### #0819 — Communication to Remote Workforce

Write the communication strategy for reaching a fully remote workforce of 400 employees across 15 countries. The challenges: different timezones, different languages (primary language is English but 30% are non-native speakers), low email open rates, and varying access to company tools. The strategy should: define the primary communication channel (company intranet or All-Hands communication platform), establish a communication schedule (no surprises — employees know when to expect company news), use multiple formats (text, video, visual summary), ensure critical communications are acknowledged (for policy changes: confirmation required), and measure communication effectiveness (open rate, comprehension survey).

### #0820 — Difficult Conversation Preparation Guide

Write the difficult conversation preparation guide for managers. The guide should cover 5 types of difficult conversations: performance improvement, compensation denial, role elimination, behavioral feedback, and career derailment. For each conversation type: the preparation required (what evidence do you need?), the opening sentence (specific, not vague — 'I want to talk about the last 3 months of performance' not 'I want to check in'), the conversation structure (say what you need to say before asking questions), how to handle emotional reactions, and what documentation is required after. Include the SBAR framework (Situation, Background, Assessment, Recommendation) for structuring the conversation.

### #0821 — Information Architecture for Executives

Write the information architecture for the executive team — a guide to where to find everything they need to know. The problem: information is spread across Slack, email, Notion, Google Drive, Salesforce, and tribal knowledge. The architecture should: define a single home for each type of information (board materials in one place, OKRs in one place, project status in one place), create the naming conventions and folder structure, establish the information lifecycle (what gets archived and when?), define who can create new top-level information spaces, and create the executive's 'daily information routine' (what to check every morning to stay current without being overwhelmed).

### #0822 — Stakeholder Management Guide

Write the stakeholder management guide for large cross-functional projects. The project stakeholder map should: identify all stakeholders (RACI: Responsible, Accountable, Consulted, Informed), assess their influence and interest levels, design a tailored communication approach for each stakeholder group, define the frequency and format of stakeholder updates, and create the escalation process for stakeholder resistance. Include the stakeholder map template, the communication planning worksheet, and the guide for managing a stakeholder who is actively blocking the project.

### #0823 — Executive Memo Writing Guide

Write the executive memo writing guide for senior leaders. A good executive memo is short, direct, and structured for decision-making. The guide should cover: the BLUF format (Bottom Line Up Front — state your conclusion in the first sentence), the one-page standard (if you cannot make your case in one page, you haven't thought clearly enough), the appendix approach (supporting data and detailed analysis in an appendix for those who want to go deeper), the recommendation structure (what are you asking the reader to do?), and common executive memo failures (burying the recommendation, excess jargon, failing to address the obvious counterargument). Include a before/after example.

### #0824 — Strategic Thinking Development Program

Write the strategic thinking development program for high-potential managers who are strong operators but need to develop strategic capability to move into senior roles. The program should develop: systems thinking (seeing the whole system, not just the local problem), scenario planning (imaging multiple futures and the strategic implications), competitive analysis (understanding the competitive dynamics of the industry), and narrative construction (building the story that connects today's actions to tomorrow's vision). Format: 6 two-hour workshops over 6 months, plus a strategic project that each participant presents to the executive team.

### #0825 — Meeting Note Standards

Write the meeting note standards for a company where important decisions are being made without documentation. Meeting notes should: capture decisions (not discussions — the decision and the decision-maker, not the full debate), action items (owner, deliverable, due date), dependencies and blockers raised, and the next meeting date. Meeting notes should NOT be: a full transcript, a list of everything said, or a retrospective essay. Write the standard, the template, and the 5-minute note-writing habit that produces notes this good.

### #0826 — Leadership Vision Communication

Write the guide for communicating a leadership vision to a team. A vision is not a mission statement — it is a vivid, specific description of what success looks like 3 years from now. The guide should: help leaders articulate their vision in concrete terms (not 'be the best customer success team' but 'every customer achieves their stated success outcome within 90 days, and 40% of customers publish a case study about the results they achieved'), test the vision for inspiring clarity (does the team understand what they need to do differently?), and design the communication approach (vision should be repeated in every team communication until it is internalized).

### #0827 — Feedback Culture Assessment

Write the feedback culture assessment tool. The assessment measures how well the company is building a culture of developmental feedback. Dimensions: frequency (how often are people giving and receiving feedback?), quality (is the feedback specific and actionable?), psychological safety (do people feel safe receiving feedback without defensive reactions?), cross-directional (is feedback flowing up, down, and sideways — not just from managers to reports?), and follow-through (when feedback is given, does behavior change?). Write the 15-question assessment, the scoring rubric, and the improvement actions for each dimension.

### #0828 — Agenda Design Best Practice

Write the agenda design best practice guide. Bad agendas are lists of topics. Good agendas are lists of outcomes. Every agenda item should answer: what decision or conclusion do we need by the end of this segment? The guide should: distinguish between decision meetings (a choice needs to be made), discussion meetings (perspectives need to be shared before a decision), and information meetings (updates are being shared — should this be async instead?), teach the agenda item format (Topic: [decision question]; Owner: [name]; Time: [X min]; Pre-read: [document]), and include a template for a 60-minute executive team meeting.

### #0829 — Leadership Team Retreat Facilitation

Write the annual leadership team retreat facilitation guide. The retreat should: assess the team's effectiveness as a leadership team (not just as function heads), address the interpersonal dynamics that are affecting collaboration (using a structured exercise), build shared strategic understanding (do all leaders have the same view of the company's key priorities?), and establish shared commitments for how the team will operate in the coming year. Use the Five Dysfunctions of a Team framework as a diagnostic tool. Write the 2-day agenda with facilitation instructions for each session.

### #0830 — Executive Communication Calibration

Write the guide for calibrating executive communication. Different audiences need different communication: the board needs strategic context and governance-relevant updates; the investor community needs financial performance and strategic confidence; employees need transparency and emotional connection; customers need reliability and value; and media needs a clear, defensible narrative. Write the calibration guide for each audience: what they care about, what they are worried about, what they need to hear from you, and what they should never hear from you (the specific things that undermine credibility with each audience).

### #0831 — Meeting Cost Calculator

Build the meeting cost calculator guide for a company that wants to reduce unnecessary meetings. The calculation: identify the loaded cost per hour for each attendee level (VP: \$120/hr, Director: \$80/hr, Manager: \$60/hr, IC: \$40/hr), multiply by the number of attendees and the duration, and present the total meeting cost as a concrete number. Example: a weekly 1-hour all-hands for 100 people (\$50 average/hr) costs \$260,000/year. Use this data to challenge the necessity of expensive recurring meetings. Write the methodology, the executive presentation format, and the questions to ask about each meeting type.

### #0832 — Executive Presence Development

Write the executive presence development program for high-potential employees who are technically excellent but need to develop executive presence to advance. Executive presence is: clarity of thought (can you explain a complex idea simply?), composure (do you stay calm and grounded in high-pressure situations?), conviction (do you hold a position under pressure, or do you collapse?), and audience connection (do you communicate to the specific person in front of you?). The program should: use 360 feedback to diagnose the specific gaps, provide 1:1 coaching (not classroom training — executive presence is developed through practice), create real opportunities for visibility (present to the board, lead a cross-functional project).

### #0833 — Company Communication Calendar

Write the company communication calendar for a year. The calendar should schedule: weekly CEO email to the whole company (Fridays), monthly all-hands meeting (last Thursday of the month), quarterly OKR review (all-company, end of each quarter), semi-annual manager briefing (before company-wide changes), annual strategy communication (start of fiscal year), and ad-hoc communications (M&A; announcements, leadership changes, significant product launches). Write the calendar with the communication owner, the audience, the format (email, meeting, video), and the preparation timeline for each communication type.

### #0834 — Thought Leadership Program

Design the executive thought leadership program. The CEO and 2-3 other executives should be recognized thought leaders in their domain. The program should: identify the thought leadership topic for each executive (authentic — based on their genuine expertise and perspective), build the content machine (a Chief of Staff or communications lead who helps translate the executive's thinking into content), select the channels (LinkedIn for most executives, conference speaking for technical leaders, media interviews for the CEO), set content cadence (2-3 posts per month minimum), and measure impact (follower growth, engagement rate, speaking invitations, media mentions). Write the 6-month plan for the CEO's thought leadership.

### #0835 — Change Communication Framework

Write the change communication framework for organizational changes. Change communication fails when: the 'why' is not explained (people resist change they don't understand), the information is given too late (rumors fill the vacuum), and the communication is one-way (people need to ask questions and have them answered). The framework should: establish the communication sequence (leadership first, then management cascade, then all-staff), define the key messages for each stakeholder group, create the Q&A; document before the announcement (prepare for 20 questions the team will ask), and design the listening mechanism (how will management hear and respond to employee reactions?).

### #0836 — Strategic Presentation Preparation

Write the strategic presentation preparation guide for executives presenting to the board of directors. The board wants: strategic insight, not operational detail; honest assessment of risks, not optimistic spin; clear choices, not a list of options with no recommendation; and confidence in the management team's judgment. The guide should: help the executive select the 3 most important things the board needs to understand (not everything — choose), test the presentation for strategic depth (is the board learning something they didn't know?), and prepare for the 10 most likely board questions. Write the preparation process, the rehearsal guide, and the question preparation methodology.

### #0837 — Knowledge Sharing Platform Design

Design the knowledge sharing platform for a 400-person company where valuable knowledge is trapped in individual experts' heads. The platform should enable: expert profiles (employees declare their expertise areas — other employees can find and consult them), knowledge articles (how-to guides and best practices, searchable), decision archive (records of past strategic decisions and the reasoning), lessons learned (post-project documentation of what worked and what didn't), and AI-powered search (natural language search across all knowledge artifacts). Write the governance model (who owns content quality?), the contribution incentives, and the adoption strategy.

### #0838 — Effective Skip-Level Conversations

Write the guide for skip-level conversations. A skip-level is when a manager's manager meets directly with the lower-level team (skipping the intermediate manager). Done well, skip-levels are one of the most powerful tools for senior leaders to understand organizational reality. Done poorly, they undermine the intermediate manager. The guide should: define the purpose (gathering organizational insight, building connection, not evaluating the intermediate manager), the preparation required (what do you want to learn?), the 10 questions to ask (open-ended, curiosity-driven, not leading), how to handle criticism of the intermediate manager (neutralize it, do not escalate it inappropriately), and how to close the loop.

### #0839 — AI Productivity Tools Adoption Guide

Write the AI productivity tools adoption guide for executives. The guide should cover the top 5 AI productivity tools and how each adds value for executives: (1) AI notetaker (join meetings, transcribe, extract action items — saves 1-2 hours/week), (2) AI email assistant (drafts responses, summarizes threads, flags urgent items — saves 45 min/day), (3) AI research assistant (summarizes long documents, answers questions about uploaded files — saves 3-4 hours/week), (4) AI writing assistant (first draft of memos, presentations, emails — saves 2-3 hours/week), (5) AI calendar optimizer (proposes meeting agendas, blocks focus time, schedules based on priorities — saves 30 min/day). Write the workflow for incorporating each tool.

### #0840 — Leadership Communication in Hybrid Work

Write the leadership communication guide for the hybrid work context. In hybrid work, communication inequities emerge: in-office employees have more informal access to leadership (hallway conversations, impromptu lunches) that remote employees miss. The guide should: establish the information equity principle (critical information reaches remote and in-office employees simultaneously), create the communication infrastructure for equity (team Slack channels, recorded all-hands, written decision logs), help leaders be conscious of informal communication bias, and design the hybrid check-in format that gives all employees equal voice.

### #0841 — Executive Storytelling Guide

Write the executive storytelling guide for leaders who need to inspire their teams. Data tells people what; stories tell people why. The guide should: explain the narrative structure that works for business contexts (situation-complication-resolution), help executives identify the stories from their own experience that illustrate the company's values and strategy, teach the specific techniques that make stories memorable (sensory detail, vulnerability, surprise), and provide 5 story frameworks for common leadership situations (celebrating a win, rallying the team after a setback, announcing a hard change, connecting daily work to purpose, welcoming a new team member).

### #0842 — One-on-One Meeting Effectiveness Audit

Write the 1:1 meeting effectiveness audit for a company where surveys show that employees do not find their 1:1s valuable. The audit should: survey employees on what they experience in their 1:1s (is it a status update? a coaching conversation? a rushed 15 minutes?), survey managers on what they believe they are doing in their 1:1s (often different from what employees experience), compare the two perspectives to identify the gap, identify the top 3 1:1 failure patterns, and design the intervention (1:1 training, a new template, or a norm-setting conversation at the leadership level).

### #0843 — Company Culture Measurement System

Design the company culture measurement system. Culture is often described qualitatively but rarely measured systematically. The measurement system should: define the 5-8 specific cultural values the company is trying to live (not aspirational values but observable behaviors), create measurable proxies for each value (psychological safety: team members speak up when they disagree; accountability: commitments are kept without reminders), integrate culture measurement into the quarterly engagement survey, report culture metrics to the board annually, and hold leadership accountable for culture metrics as part of their performance review.

#### #0844 — Agile Meeting Practices Guide

Write the agile meeting practices guide for non-engineering teams adopting agile principles. Agile meetings for business teams: the weekly standup (15 minutes, async alternative available, covers: what did I complete, what am I working on, what is blocking me?), the sprint planning (what will the team commit to completing this 2-week sprint?), the retrospective (what went well, what could improve, what will we change?), and the stakeholder review (what did the team complete this sprint, and does it meet the acceptance criteria?). Write the guide for each meeting type with timing, facilitation, and the remote-first adaptation.

#### #0845 — Manager Communication Norms

Write the manager communication norms policy. The policy should address: response time expectations (managers must respond to direct reports within 24 hours during business days), communication transparency (managers share information with their team as early as possible, even if incomplete), meeting frequency (managers must hold at least bi-weekly 1:1s with each direct report), after-hours communication (managers should not expect responses to non-urgent messages outside business hours), and the manager communication assessment (annual 360 question: 'Does your manager communicate clearly and transparently?').

#### #0846 — Town Hall Best Practices

Write the town hall best practices guide for quarterly company town halls. Town halls fail when: they are too long (over 60 minutes), dominated by executive presentations (with no time for employee voice), feel like a performance (scripted, defensive), and questions are pre-screened to remove difficult ones. Town halls succeed when: they are short (45-60 minutes maximum), CEO spends more time answering questions than presenting, questions are submitted anonymously in advance (real questions, not softballs), and the CEO answers difficult questions directly. Write the preparation guide, the format, and the CEO preparation tips.

## SECTION 09

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81 unique prompts for senior executives

#### #0847 — Budget Planning Season Guide — CREATE Format

Context: You are the CFO preparing the 2026 annual budget process for a \$180M revenue SaaS company. Last year's budget was done poorly — numbers were negotiated rather than derived from strategy, departmental budgets were padded by 15% on average, and the final budget was approved 3 weeks into the new year. The CEO has said 'fix the process.' Request: Design the 2026 budget process from scratch. Define: the process philosophy (top-down guidance + bottom-up build = final budget), the timeline (when does each step happen), the roles and responsibilities, the templates that departments fill out, the review and challenge process, the linkage between OKRs and budget, and the approval sequence. The process should end with a board-approved budget by December 1, 2025. Adjustments: Address the specific failure modes from last year: padding, disconnect from strategy, timeline slip. Include specific anti-padding mechanisms. Tone: This is an internal process document for the finance team and leadership, not a public document. Be direct and operational.

#### #0848 — CFO Investment Case for AI — One-Shot

The CTO wants \$4M to build the company's AI capability (2 ML engineers, cloud infrastructure, an AI platform license, and 6 months of implementation). You are the CFO. Your job is to evaluate and stress-test this business case before presenting it to the board. CFO review framework for technology investment cases: '1. Is the ROI real? — Decompose the claimed savings/revenue into specific line items. Can each be measured? Are the assumptions reasonable? 2. What is the fully-loaded cost? — Has the CTO included implementation labor, change management, ongoing maintenance, and the opportunity cost of the engineering team? 3. What happens if it fails? — Is the \$4M recoverable? What does a failure look like, and what is the downside? 4. Is the timing right? — Is the company at a stage where it can absorb the distraction of a \$4M AI implementation? 5. What are the alternatives? — Could we achieve 70% of the benefit for 30% of the cost by buying instead of building?' Apply this framework to the \$4M AI capability investment case. Then write the CFO's recommendation memo for the board.

#### #0849 — Variance Analysis Narrative — One-Shot

You are the FP&A Manager and you need to explain a \$2.4M negative revenue variance for Q3. Your CFO wants a narrative that explains the variance at the P&L; line level before the board meeting. Variance analysis narrative structure: 'Revenue Variance (\$2.4M unfavorable vs. plan): — New logo revenue: \$1.8M below plan. Driver: 3 enterprise deals slipped to Q4 (totaling \$2.1M). Offset by: 2 unplanned deals closed (\$0.3M). Probability of slipped deals closing in Q4: 85%. [CSAM names, deal names] — Expansion revenue: \$0.4M above plan. Driver: above-plan expansion in Financial Services vertical (+\$0.6M) offset by Healthcare segment lagging (-\$0.2M). — Churn: In line with plan. 2 customers churned (\$0.8M) vs. plan of \$0.7M. Net: Revenue miss driven primarily by Q3-to-Q4 timing, not demand loss. Q4 pipeline coverage is 2.8x after accounting for slipped deals.' Write the full variance analysis narrative for this scenario.

#### #0850 — Financial Model Review Checklist — Few-Shot

You are reviewing a financial model built by an analyst before it is used in a board presentation. Create a rigorous financial model review checklist. Examples of fatal model errors that have embarrassed CFOs: Example 1 — Sign error: 'The model was summing revenue and expenses with the same sign, making the P&L; look profitable when it was a loss. The error was caught the night before the board meeting.' Example 2 — Circular reference: 'A circular reference in the interest calculation was causing Excel to iterate to a wrong solution when circular reference calculation was turned off on some machines.' Example 3 — Hard-coded assumptions: 'The model used hard-coded growth rates in 12 cells instead of pulling from a central assumptions table, meaning assumption sensitivity analysis was impossible without manually changing 12 cells.' Example 4 — Base period error: 'The model's 'Year 1' was supposed to be 2025, but the historical data extended only through Q2 2024, creating a 6-month data gap that inflated the YoY growth rates.' Write the complete 40-point financial model review checklist covering: structure and navigation, formula integrity, assumption documentation, scenario analysis capability, output validation, and presentation readiness.

### #0851 — Working Capital Optimization — Chain-of-Thought

Our CFO wants to reduce Days Sales Outstanding (DSO) from 58 days to 38 days in 6 months without damaging customer relationships. Walk me through how to approach this. Step 1: Diagnose. What are the root causes of high DSO? What data do I need to analyze first? Step 2: Segment the analysis. Not all DSO is the same — how do I identify where the biggest opportunities are? Step 3: Quick wins. What changes can be made in the first 30 days that have no customer relationship risk? Step 4: Process changes. What billing and collections process improvements reduce DSO structurally? Step 5: Commercial policy changes. What contract terms should be renegotiated? What payment incentives work? Step 6: Escalation protocol. When does a DSO issue become a credit risk issue? Step 7: Measurement. How do I track progress weekly and hold the AR team accountable? Work through each step, then give me the 6-month DSO reduction plan.

### #0852 — Annual Financial Forecast Process

Design the quarterly financial forecasting process for a \$200M revenue company. The process should produce an updated annual forecast every quarter (replacing the outdated annual budget with a rolling view). Define: the inputs (actuals, pipeline data, market indicators), the methodology (driver-based vs. management judgment vs. bottom-up rollup), the timeline (when department heads submit, when FP&A consolidates, when CFO reviews, when board is updated), the output format (revised P&L, revised cash flow, sensitivity analysis), and how to communicate forecast changes to the board (what triggers a mid-quarter update vs. waiting for the quarterly review).

### #0853 — Cost Center Budget Defense Guide

Write the guide for department heads on how to defend their budget in the annual review session with the CFO. The guide should cover: how to present the budget as a business case (not just a list of costs), how to prioritize within the budget (what you will cut if forced to, what is mission-critical), how to present headcount requests (with productivity data and ROI), how to respond to CFO challenges without getting defensive, what data to have ready for common CFO questions, and the one mistake that kills budget credibility (not knowing your numbers cold).

### #0854 — Fundraising Memo for Series C — One-Shot

Write the CEO's narrative for a Series C fundraising memo. The company: \$28M ARR, growing 85% YoY, -35% EBITDA margin, raising \$80M to fund international expansion and product R&D.; The company is an AI-powered legal tech platform. Include: the company vision and why now, the market opportunity (TAM and why this company wins it), the business model and unit economics, progress to date (key milestones), the team (why this specific team), use of proceeds (\$80M allocated to: X, Y, Z), the financial model (ARR bridge to \$100M), and the ask (what the company is looking for in a Series C partner beyond capital). Example of a strong fundraising narrative opener: 'Every lawyer spends 60% of their time on work that software could do better. We have built the software. \$28M ARR growing 85% and 200 enterprise law firms agree. We are raising \$80M to make this the default operating system for legal teams globally.'

### #0855 — Financial Controls Self-Assessment

Write the annual financial controls self-assessment for department heads. The self-assessment covers: purchase order compliance (% of purchases with approved POs), expense policy compliance (% of expenses with receipts, within policy limits), budget variance explanations (all variances >10% documented), headcount reconciliation (actual headcount matches approved positions), software subscription management (all SaaS subscriptions approved and on the approved list), and data accuracy attestation (the data submitted to finance is accurate and complete). Include a sign-off mechanism.

### #0856 — CFO Communication for Earnings Miss

Write the CFO's script for communicating an earnings miss to the board. The company missed Q3 revenue guidance by \$3.2M (8%) and is reducing full-year guidance by \$8M. The primary reason: two large enterprise deals are delayed (not lost), but the miss will be visible to investors. The CFO needs to: present the facts clearly, explain the distinction between lost deals and delayed deals, provide updated guidance with credible assumptions, and address the board's likely concern about management's forecasting credibility. Include the script for the main presentation and the anticipated board questions with prepared responses.

### #0857 — Treasury Management Policy

Write the treasury management policy for a \$150M revenue company holding \$35M in cash. The policy should cover: cash investment guidelines (what vehicles are approved — money market funds, T-bills, short-duration bond funds — and the rationale for each), concentration limits (no more than X% with a single institution), the FX hedging policy (for companies with international revenue), the cash flow forecasting process, the approval authorities for cash movements above specified thresholds, and the quarterly treasury review process with the board audit committee. Reference the company's duty to preserve capital.

### #0858 — FP&A; Business Partner Guide

Write the guide for FP&A; business partners — finance professionals who are embedded with business units rather than sitting in central finance. The guide should cover: the FPABP's primary responsibilities (forward-looking analysis, not backward-looking reporting), how to build credibility with the business (don't just report what happened — explain what will happen), how to challenge business assumptions without creating adversarial relationships, the decision support frameworks FPABPs should be able to apply (ROI analysis, scenario modeling, make vs. buy), and the metrics the FPABP is accountable for (forecast accuracy, decision support quality as rated by the business).

### #0859 — Unit Economics Analysis

Write the unit economics analysis framework for a B2B SaaS company raising a Series B. The analysis should cover: Customer Acquisition Cost (CAC) calculation and by-channel breakdown, Customer Lifetime Value (LTV) calculation with assumptions on churn and expansion, LTV:CAC ratio with target (>3x is strong, <2x is concerning), CAC payback period with target (<18 months for enterprise SaaS), Gross Margin by product line, and Net Revenue Retention (NRR) as the single most important unit economics indicator. Show the math for each metric, note the benchmarks, and provide a qualitative interpretation of what the numbers mean for the investment thesis.

### #0860 — Capital Allocation Framework

Write the capital allocation framework for a profitable, cash-generative company (\$45M EBITDA) that is deciding how to allocate its capital among: organic growth investment (R&D, sales, marketing), M&A, share repurchases, and dividends. The framework should: define the company's capital allocation priorities in rank order, set the financial parameters for each category (minimum cash reserve, max leverage for M&A, return threshold for organic investment), describe the decision process for any capital allocation above a threshold, and specify the metrics that would trigger a reallocation (e.g., if organic investment ROIC falls below X%, shift capital to buybacks).

### #0861 — Revenue Recognition Policy

Write the revenue recognition policy for a SaaS company offering: subscription software (monthly and annual contracts), professional services (implementation, training, consulting), and marketplace transactions (company takes a commission on third-party transactions). The policy should: define the 5-step ASC 606 revenue recognition process as it applies to each revenue type, specify how multi-element arrangements are unbundled and allocated to performance obligations, define the criteria for recognizing services revenue (over time vs. at a point in time), address how to handle contract modifications, and specify the reconciliation process between recognized revenue and cash received. Include worked examples for complex arrangements.

### #0862 — Rolling Forecast Implementation Guide

Write the implementation guide for transitioning from annual budgeting to rolling forecasting. The company currently sets a fixed annual budget in October and measures against it for 12 months. The transition to 5-quarter rolling forecasts means re-forecasting every quarter. The guide should cover: the philosophical shift (forecasting is for decision-making, not for measurement), the new process design (when is the rolling forecast updated, who inputs data, how is it reviewed), the technology requirements, the change management plan for finance team and business unit leadership, and how to handle the residual use of the original annual budget for incentive compensation purposes during the transition.

### #0863 — CFO Dashboard Design

Design the CFO's personal dashboard — the view of the business they look at every morning. The dashboard should show: yesterday's cash position and MTD collections, yesterday's billings and MTD vs. plan, open AR aging (total, % over 60 days, top 5 overdue accounts), current month forecast accuracy (expected vs. plan), last 7-day headcount changes (hires, departures), and any alerts (accounts payable past due, budget line over threshold, cash balance below minimum). The dashboard is for the CFO's personal use — it should be actionable in 5 minutes, not comprehensive.

### #0864 — Financial Due Diligence Checklist

Write the financial due diligence checklist for the buyer side of an acquisition. The checklist should cover: revenue quality (ARR waterfall, revenue recognition policies, customer concentration, contract terms), gross margin analysis (true fully-loaded margin vs. non-GAAP margin), SG&A; normalization (one-time items, founder compensation above market), capex requirements (what ongoing investment is required to maintain revenue?), working capital profile (cash conversion cycle, AR quality), off-balance sheet liabilities (operating leases, contingent liabilities, litigation), and tax compliance. Each item should note what documents to request and what red flags to look for.

### #0865 — Headcount ROI Model

Build the headcount ROI model for justifying a new hire to the CFO. The model should capture: the fully-loaded cost of the hire (salary, benefits, equity, equipment, training — typically 1.25-1.4x base salary), the expected contribution (direct revenue, cost savings, or productivity multiplier on the team), the time-to-productivity (when does the hire become net positive?), the break-even analysis (how long until the ROI becomes positive?), the sensitivity analysis (what if productivity ramp takes 2x as long?), and the cost of NOT hiring (opportunity cost of work not done, overtime on current team). Make the model reusable for any hire.

### #0866 — Scenario Financial Modeling Guide

Write the guide for building scenario financial models that actually inform decisions (vs. elaborate spreadsheets that nobody uses). The guide should cover: how to define scenarios (not just 'optimistic/base/pessimistic' — define the specific assumptions that differ between scenarios), how to structure the model (one input sheet, one calculation sheet, scenario toggle), the 5 most important scenario levers for a SaaS business (churn rate, growth rate, gross margin, CAC, burn rate), how to communicate scenario outputs to non-financial executives (the 'bridge chart' technique), and what to do when actual results fall outside all three scenarios.

### #0867 — AI-Assisted Financial Modeling Guide

Write the guide for using AI to accelerate financial modeling. Cover the specific tasks where AI adds the most value: (1) writing formulas and model logic in plain English ('write an Excel formula that calculates rolling 12-month NRR given a customer table with ARR start, expansions, contractions, and churn'), (2) explaining models ('explain this financial model to a non-financial executive'), (3) drafting CFO commentary ('write the CFO commentary for these Q3 financials — highlight the 3 most important insights'), (4) stress-testing assumptions ('what assumptions in this model are most sensitive to error?'). Include 5 specific prompt examples with before/after comparisons.

### #0868 — Financial Restatement Communication Plan

Write the communication plan for a financial restatement. The company discovered that revenue for the past 3 years was overstated due to a revenue recognition error. The restatement will reduce cumulative revenue by \$12M (4% of cumulative reported revenue). The plan covers: SEC disclosure timing and requirements (8-K filing), audit committee notification (before public disclosure), investor communication (conference call, written Q&A;), employee communication (what employees need to know, what they don't), customer communication (is restatement customer-relevant?), and media management (hold statement, FAQ for press inquiries). This is a crisis with legal, regulatory, and reputational dimensions.

### #0869 — Cash Flow Forecasting Model

Write the cash flow forecasting methodology for a SaaS company. The methodology should cover: the 13-week rolling cash flow forecast structure (receipts from customers, payroll and benefits, vendor payments, debt service, capex), the key assumptions (what % of invoices are collected in <30 days vs. 30-60 days vs. 60+ days?), the weekly refresh process (who inputs data, who reviews, when is the CFO alerted to a potential shortfall?), the 'minimum cash balance' policy (below what cash level does management escalate to the board?), and the integration between the AR aging report and the cash receipt forecast. Include the template.

### #0870 — Equity Dilution Analysis for Employees

Write the employee-facing equity dilution explainer for a company about to raise a Series C with significant new share issuance. Employees with early stock options are worried about dilution. The explainer should: explain dilution in plain English (more shares doesn't mean your shares are worth less, it depends on the valuation), give a worked example with numbers, explain the anti-dilution provisions in the SAFE notes (if applicable), explain the difference between pre-money and post-money valuation, and help employees understand how to think about their options' potential value at exit. This is a sensitive communication — employees are worried about their financial futures.

### #0871 — Tax Strategy Memo for CFO

Write the annual tax strategy memo for the CFO. The memo should cover: the effective tax rate for the current year vs. plan, the key drivers of variance (R&D; tax credits, international tax structuring, timing of deductions), the 3 largest tax risks (transfer pricing, state nexus issues, changes in tax law), the tax planning opportunities for the coming year (\$X reduction in effective tax rate achievable through [specific actions]), and the tax reserves adequacy assessment. Include the relationship with external tax counsel and any IRS correspondence updates. This is a CFO-level document for internal use.

### #0872 — Financial Literacy Training for Non-Finance Leaders

Design the financial literacy program for VP-level leaders who do not have a finance background. The program should cover 4 modules: Module 1 (2 hours): Reading the financial statements — P&L, balance sheet, cash flow; Module 2 (2 hours): Understanding SaaS unit economics — ARR, NRR, LTV:CAC, gross margin; Module 3 (2 hours): Budget management — how to read your department P&L, what variance analysis means, how to manage headcount; Module 4 (2 hours): Business case building — how to justify an investment to the CFO. For each module, include a worked example using the company's own numbers (with appropriate confidentiality).

### #0873 — Debt Facility Negotiation Strategy

Write the debt facility negotiation strategy for a company seeking a \$30M revolving credit facility. The company is \$80M ARR, growing 30%, with \$5M EBITDA. The strategy should: identify the right lenders to approach (venture debt lenders vs. traditional banks vs. ABL lenders for SaaS), the key terms to negotiate (interest rate, financial covenants, borrowing base, prepayment penalties, information covenants), the covenants to avoid if possible (minimum revenue covenant vs. maximum leverage covenant — understand which gives more flexibility), the comparison of term sheets received, and the recommendation. Include the pro-forma financial impact of drawing the facility.

### #0874 — Accounts Receivable Aging Analysis

Write the methodology for the monthly accounts receivable aging analysis review. The review should: analyze the AR aging report (current, 30-60 days, 60-90 days, 90+ days), identify the top 10 overdue accounts by dollar value and develop collection plans for each, assess the adequacy of the bad debt reserve (is the reserve calibrated to actual historical write-offs?), flag any accounts where overdue AR signals customer health risk (coordinated with CS team), and present findings to the CFO with specific recommended actions. Include the template for the CFO presentation and the AR manager action plan.

#### #0875 — Finance Team AI Readiness Assessment

Write the AI readiness assessment for a finance team considering deploying AI tools. The assessment should evaluate: data quality (are financial records clean enough for AI to work with?), process documentation (are current processes documented so AI can replicate them?), staff readiness (are finance team members ready to work with AI tools — do they understand prompt engineering?), technology infrastructure (can our ERP and BI tools integrate with AI?), and governance readiness (do we have policies for AI use in financial reporting?). Score each dimension and recommend the top 3 improvements needed before deploying AI in finance.

#### #0876 — Cost Per Acquisition Channel Analysis

Write the cost per acquisition (CPA) analysis by marketing channel for the board. The analysis should compare: paid search, organic search (SEO), paid social, content marketing, events, partner referrals, and sales-driven outbound. For each channel, calculate: total spend, total leads generated, MQL to SQL conversion rate, SQL to close rate, average ACV of deals from this channel, total customers acquired, CAC (total channel cost / customers acquired), and LTV:CAC ratio. The analysis should identify the 2-3 channels with the best unit economics and recommend the budget reallocation. Present as a channel ranking table with narrative commentary.

#### #0877 — SaaS Financial Model Template

Write the SaaS financial model template for a company planning its Series B fundraise. The model should include: the ARR build (beginning ARR + new bookings + expansion - churn = ending ARR), the income statement (revenue recognition methodology for annual vs. multi-year contracts, COGS including hosting and CS costs, gross margin calculation, operating expense by function, EBITDA), the cash flow statement (accounts receivable, deferred revenue, accounts payable timing), and the key SaaS metrics dashboard (NRR, GRR, LTV:CAC, CAC payback, burn multiple). Include formulas and model structure — not just descriptions.

#### #0878 — Working Capital Optimization

Write the working capital optimization plan for a \$50M ARR company with \$8M tied up in working capital inefficiencies. The analysis should: calculate the current cash conversion cycle (DPO, DSO, DIO), identify the biggest working capital driver (accounts receivable: invoices going unpaid for an average of 58 days), and propose specific actions for each driver. For AR: implement automated dunning, offer early payment discounts to large customers, hire an AR specialist. Target: reduce DSO from 58 to 42 days (releases \$2.5M cash). Write the implementation plan and the financial impact model.

#### #0879 — Revenue Recognition Policy

Write the revenue recognition policy under ASC 606 for a SaaS company. The policy should cover: performance obligation identification (software access, implementation services, and support are separate obligations), standalone selling price determination (how is SSP calculated for each obligation?), transaction price allocation (how is the total deal price allocated to each obligation?), recognition timing (SaaS subscription recognized ratably; implementation recognized at completion or percentage of completion), and the impact of contract modifications (what happens when a customer adds seats mid-term?). Include worked examples for a 3-year contract with implementation services.

#### #0880 — Budget Process Efficiency

Write the budget process efficiency improvement plan. Current state: annual budget process takes 12 weeks, involves 50 managers, produces 800 lines in a spreadsheet, and changes 3 times before being approved by the board. Target: 6-week process, 15 key budget owners, principle-based guidelines (not bottom-up line item building), and scenario modeling built in. The improvement plan should: streamline the number of budget participants, shift from bottom-up to top-down + bottom-up hybrid, automate the consolidation process, and design the scenario modeling framework. Include the revised budget calendar.

### #0881 — Cap Table Modeling

Write the cap table modeling guide for a growth-stage company preparing for a Series C. The cap table should model: current fully diluted shares outstanding (common, preferred, options, warrants, SAFEs if any), the Series C raise (new shares issued at a specific pre-money valuation), the post-money cap table, the impact of the employee option pool refresh (adding 10% of post-money shares to the option pool), and the waterfall analysis (at different exit valuations, how much does each shareholder class receive?). Write the model structure and the sensitivity tables.

### #0882 — Finance Automation Roadmap

Write the 18-month finance automation roadmap. Processes to automate: (1) month-end close (from 12 days to 7 days — automate bank reconciliation, intercompany reconciliation, and accruals processing), (2) accounts payable (automated invoice processing and PO matching), (3) accounts receivable (automated invoicing and collections), (4) expense management (AI-powered expense coding and policy compliance checking), (5) financial reporting (automated data consolidation from ERP and BI tools). For each process, write the automation technology, the investment required, the time savings, and the error reduction expected.

### #0883 — CFO First 90 Days Plan

Write the CFO's first 90-day plan for a new CFO joining a Series D company. Month 1: Listen and assess (meet all direct reports, the CEO, board, top 5 investors, and key business unit leaders; understand the accounting close process; review all existing financial models and reports; assess the finance team's capability). Month 2: Diagnose and plan (identify top 3 financial risks; assess accounting and reporting quality; evaluate finance team structure vs. needs). Month 3: Communicate and act (present findings to CEO and board; implement 2-3 quick wins; set the finance team's 6-month priorities). Include the 50 questions a new CFO should ask in the first 30 days.

### #0884 — Fundraising Dataroom Checklist

Write the investor due diligence dataroom checklist for a Series B fundraise. The dataroom should include: Corporate (certificate of incorporation, cap table, board minutes, shareholder agreements), Financial (audited financials, management accounts, financial model with assumptions, bank statements), Commercial (customer contracts, ARR and NRR detail, top customer cohort analysis, sales pipeline), People (organization chart, executive team bios, equity summary by employee), Legal (IP ownership documentation, outstanding litigation, material contracts), and Technology (architecture overview, security audit, GDPR compliance documentation). Write the document list, the format requirements, and the access control protocol.

### #0885 — Financial Risk Register

Write the financial risk register for a \$100M ARR SaaS company. Risk categories: Market risk (customer concentration, competitive pricing pressure, macroeconomic downturns), Credit risk (customer credit quality, collections risk), Liquidity risk (cash runway, debt covenant compliance), Interest rate risk (floating rate debt exposure), Foreign exchange risk (international revenue in non-USD currencies), and Operational risk (internal controls weaknesses, fraud risk, key person dependencies in finance). For each risk, rate the likelihood and impact, describe the current controls, and propose additional mitigation if the residual risk exceeds tolerance.

### #0886 — Financial Modeling Best Practices

Write the financial modeling best practices guide for the finance team. Best practices: (1) Structure (separate inputs, calculations, and outputs — never hardcode a number in a formula), (2) Auditability (every number must trace to a source — no unexplained assumptions), (3) Error checking (build in integrity checks — revenue reconciliation, balance sheet balance checks), (4) Documentation (annotate every key assumption), (5) Version control (track model versions and the reason for each change), (6) Presentation (the outputs section should look like a report, not a spreadsheet), and (7) Scenario analysis (every model should have a Base, Upside, and Downside case built in).

### #0887 — Tax Provision Process

Write the quarterly tax provision process for a multinational SaaS company. The tax provision calculates the income tax expense and the deferred tax asset/liability balance. The process should: estimate current year taxable income by jurisdiction, calculate current tax expense by jurisdiction, assess and adjust the deferred tax asset/liability (net operating loss carryforwards, timing differences), record any uncertain tax positions (FIN 48 reserves), and reconcile the effective tax rate to the statutory rate (the rate reconciliation required in financial statement disclosures). Write the process timeline, the responsibilities, and the review requirements.

### #0888 — Acquisition Financial Due Diligence

Write the financial due diligence framework for acquiring a \$15M ARR company. The due diligence should: verify the revenue (are the contracts real? are the ARR numbers accurate?), assess the quality of earnings (are there one-time items inflating EBITDA?), analyze the customer base (concentration, churn, contract terms), review the balance sheet (hidden liabilities: deferred revenue, uncapitalized leases, pending litigation?), assess the working capital requirement (how much working capital will the business need post-acquisition?), and model the post-acquisition financial performance (base case, synergy case, downside case). Write the due diligence checklist and the findings memo format.

### #0889 — Investor Relations Communication Strategy

Write the investor relations communication strategy for a public company's CFO. The strategy should cover: the quarterly earnings call (preparation timeline, Q&A; preparation, message discipline), the investor day (annual event, strategic update for institutional investors), the non-deal roadshow (quarterly meetings with top 20 institutional shareholders), the sell-side analyst relationship management (how often to meet, what to share and what not to), the retail investor communication (how to engage the growing retail shareholder base), and the guidance philosophy (give guidance or no guidance — if giving, what to guide on and how to set it conservatively). Include the communication calendar.

### #0890 — Finance Business Partner Model

Write the finance business partner (FBP) operating model. FBPs are embedded finance professionals who support business units. Unlike the traditional finance function (backward-looking reporting), FBPs are forward-looking business advisors. The model should: define the FBP's responsibilities (financial planning support, business case development, cost optimization, and performance analysis), the FBP-to-business-unit staffing ratio (typically 1 FBP per \$50M of business unit revenue), the FBP competency profile (finance plus business judgment plus communication), the governance model (FBPs report to CFO but serve the business unit heads), and the success metrics.

### #0891 — Subscription Revenue Forecasting

Write the subscription revenue forecasting methodology. Subscription revenue is predictable — if you know your retention rates, you can forecast ARR accurately. The methodology: (1) Calculate the gross retention rate by cohort (what % of ARR from each acquisition cohort is still active 12 months later?), (2) Apply the gross retention rate to the current ARR base to forecast retained revenue, (3) Apply the expansion rate (what % of retained ARR expands?) to forecast expansion revenue, (4) Add new logo bookings forecast to get total ARR. Show the sensitivity of the forecast to 1% changes in the retention rate. This is the most important sensitivity in a SaaS business.

### #0892 — Cash Management Policy

Write the cash management policy for a company with \$35M in cash. The policy should cover: bank concentration risk (do not hold more than \$250K per bank without FDIC coverage — use sweep accounts or Treasury products for balances above this level), investment policy (where can excess cash be invested — money market funds, T-Bills, commercial paper, and credit quality requirements), foreign currency management (do not leave more than 3 months of operating expenses in non-functional currencies), and the cash approval authority matrix (who can approve which types of cash movements?). Include the policy rationale in the context of recent bank failures.

### #0893 — Unit Economics Deep Dive

Write the unit economics deep dive analysis for a B2B SaaS company. Unit economics measure the profitability of each customer. The analysis should: calculate the fully-loaded CAC (include all sales and marketing costs, including the cost of lost deals), calculate the gross margin per customer ( $ARR \times \text{gross margin \%}$  — do not use company-wide gross margin; use customer-level gross margin including dedicated CS, hosting, and support costs), calculate the LTV ( $LTV = \text{gross margin per customer} / \text{churn rate}$ ), the LTV:CAC ratio, and the payback period. Segment by acquisition channel and customer tier to identify which segments have the best unit economics.

### #0894 — Financial Audit Preparation

Write the financial audit preparation guide for a company going through its first external audit. The audit is required by an investor as a condition of a Series B closing. First audit challenges: chart of accounts may not meet GAAP requirements, revenue recognition may need to be restated, equity compensation accounting (ASC 718) may be incomplete, and the company may not have an adequate close process. The guide should: map the audit requirements to current processes, identify the top 5 areas of likely audit challenge, set the timeline (audits take 4-6 months for a first audit), brief the team on what to expect, and identify the external audit firm selection criteria.

### #0895 — Business Case Template for CFO Review

Write the business case template for investment proposals reviewed by the CFO. Every investment above \$250K requires a business case. The template should include: executive summary (1 page — problem, proposed solution, cost, expected return), problem statement (what is broken and what is the cost of doing nothing?), solution options (minimum 3 options evaluated: do nothing, minimum viable solution, full solution), financial analysis (NPV, IRR, payback period — with assumptions documented), risk assessment (what could go wrong and what is the financial impact?), and implementation plan (who owns this and what are the key milestones?). Include the financial model structure.

### #0896 — Metrics for SaaS Valuation

Write the guide to the 10 metrics that most influence a SaaS company's valuation multiple. In order of importance: (1) Revenue growth rate (the most important single factor), (2) Net Revenue Retention (>120% is outstanding), (3) Gross margin (>75% for software, >60% for tech-enabled services), (4) CAC payback period (<18 months is good; <12 months is great), (5) Burn multiple (net burn / net new ARR — below 1.5 is good), (6) Customer concentration (largest customer <15% of ARR), (7) Sales efficiency (magic number — above 0.75), (8) Product retention (D30, D90 retention), (9) TAM size, and (10) Team quality. For each metric, write the current benchmark for Series B/C companies.

### #0897 — Cost Center vs. Profit Center Framework

Write the framework for transitioning functions from cost centers to profit centers. A cost center is measured on cost efficiency. A profit center is measured on revenue contribution. Some functions can become profit centers: customer success (measured on NRR, not just retention cost), data (can generate external revenue from data products), and training (can sell training to customers externally). The framework should: assess whether each function has the characteristics of a profit center (can it generate external revenue?), calculate the investment required to make the transition, and model the financial impact. Not every function should become a profit center — some are best kept as cost centers and optimized for efficiency.

### #0898 — FP&A; Talent Development

Write the FP&A; (Financial Planning and Analysis) talent development plan. FP&A; professionals need 4 competency areas: technical (Excel, SQL, financial modeling), business judgment (understanding the business well enough to interpret financial data), communication (presenting financial insights to non-financial executives), and strategic thinking (connecting financial analysis to business strategy). The development plan should: assess each team member on these 4 dimensions, design role-specific development paths, invest in the tools and training for each area (Excel advanced training, SQL bootcamp, presentation skills coaching, executive access for business immersion), and define the career path from FP&A; Analyst to Director.

### #0899 — Finance for Non-Finance Leaders

Write the finance training module for the VP of Engineering who does not have a finance background. The module should cover: how to read a P&L; for your department (what is in the R&D; line?), headcount planning and the cost of a hire (loaded cost is 1.3-1.5x salary), the difference between budget and forecast (budget is approved at year start; forecast is updated monthly), how to write a business case that will get CFO approval, and what the CFO cares about (gross margin, burn rate, payback period — not the engineering metrics you track). Duration: 2 hours. Use engineering-relevant examples throughout.

### #0900 — Insurance Program Review

Write the annual insurance program review methodology. The company's insurance program should be reviewed annually against: changes in the business (new products, new geographies, new risks), claims history (what has the company actually claimed in the past 3 years?), market conditions (are insurance premiums increasing — and why?), coverage gaps (are there risks that are not insured?), and coverage adequacy (are the policy limits sufficient for the current business size?). Coverage types to review: D&O; E&O; cyber, general liability, employment practices, product liability, and key person. Include the insurance broker RFP process.

### #0901 — Fraud Risk Assessment

Write the fraud risk assessment for a fast-growing company with weak internal controls. Fraud risk is highest in high-growth companies because: controls don't scale as fast as the business, new employees are not vetted as thoroughly, and management is focused on growth, not governance. The assessment should: identify the top 10 fraud scenarios (expense fraud, vendor fraud, payroll fraud, revenue fraud, customer payment fraud, data theft for competitive purposes, IP theft, inventory theft, procurement fraud, financial statement fraud), assess the likelihood and impact of each, and design specific controls to mitigate the highest-risk scenarios.

### #0902 — International Expansion Financial Model

Write the financial model for a company's first international expansion into the UK and Germany. The model should include: revenue projection by country (top-down: TAM x market share; bottom-up: sales capacity x average ACV), cost structure by country (local headcount costs at UK and Germany market rates, office costs, legal and compliance costs, foreign exchange hedging costs), the year 1-3 P&L; by country, and the consolidated impact on the parent company financials. Key question: is the international investment break-even by year 3? If not, is the strategic rationale (market position, customer demand) strong enough to justify the loss?

### #0903 — Deferred Revenue Management

Write the deferred revenue management guide. Deferred revenue (the liability created when a customer pays before the service is delivered) is a source of frequent confusion in SaaS companies. The guide should: explain what deferred revenue is and why it grows as a company scales, how deferred revenue appears on the balance sheet vs. the income statement, the impact of deferred revenue on cash flow analysis (deferred revenue growth is a source of cash), how to calculate ARR vs. recognized revenue (they are different), the accounting treatment for contract modifications that affect deferred revenue, and the investor perception of deferred revenue (it is a positive — it represents future revenue already sold).

### #0904 — Finance Talent Acquisition Strategy

Write the finance talent acquisition strategy for a CFO scaling the finance team from 5 to 12 people over 18 months. The strategy should: define the hiring sequence (FP&A; first — the company needs better forecasting; then Controller — accounting needs to scale; then Treasury — as the company raises more debt), write the job descriptions for each hire, define the compensation benchmarks, identify the recruiting channels (Big 4 alumni networks, finance LinkedIn communities, specialized finance recruiters), and design the finance team culture (high-performance, intellectually curious, business-partnership-oriented). Include the interview process for each role.

### #0905 — Financial Close Acceleration

Write the financial close acceleration plan to reduce close from 12 days to 7 days. Key bottlenecks: accruals process (manual, takes 3 days), intercompany reconciliations (manual, takes 2 days), consolidation (manual in Excel, takes 2 days), and report preparation (manual, takes 3 days). Acceleration actions: automate accruals using ERP AI features (saves 1.5 days), build intercompany reconciliation templates (saves 1 day), implement consolidation software (saves 1.5 days), and automate report generation (saves 2 days). Total: 6-day improvement. Write the implementation plan, the investment, and the timeline.

### #0906 — Investor Pitch Financial Model Review

Write the investor pitch financial model review checklist. Before pitching Series C investors, the financial model must be: defensible (every assumption can be justified with data or comparable company evidence), internally consistent (ARR, headcount, and opex assumptions must align — you cannot grow 50% with no new hires), presentation-ready (the model structure tells the story investors care about), stress-tested (the model should have been run under 3 scenarios — what happens if churn doubles?), and audited for errors (3-statement model must balance, ratios must be in reasonable ranges). Write the review checklist with 25 items.

### #0907 — Treasury Management Policy

Write the treasury management policy for a company with \$25M in cash. The policy should: establish the cash investment guidelines (minimum 80% in FDIC-insured or equivalent instruments, maximum 20% in money market funds, no equities), define the cash flow forecasting requirement (13-week rolling forecast, updated weekly), set the banking relationship policy (primary bank for operations, 2 secondary banks for risk diversification), establish the foreign exchange policy (hedge exposures above \$1M for currencies with more than 5% historical volatility), and define the treasury committee (CFO + CEO + Board Finance Committee chair for decisions above \$5M).

### #0908 — Financial Model Scenario Planning

Write the financial model scenario planning methodology for a company facing significant uncertainty. The methodology should: define the key uncertainty variables (revenue growth rate, gross margin, and burn rate are the most sensitive), build a scenario matrix (3x3: 3 revenue outcomes x 3 expense outcomes = 9 scenarios), identify the 'break glass' scenarios (the situations that would require immediate strategic response), calculate the cash runway under each scenario, and determine the decision triggers (at what cash balance do we need to raise capital or cut costs?). Write the full methodology and the scenario naming convention.

### #0909 — SaaS Revenue Reconciliation

Write the SaaS revenue reconciliation process — the monthly process that ensures the revenue recognized in the financial statements is accurate. The reconciliation should: start with the beginning ARR balance, add new bookings (verified against signed contracts), add expansions (verified against amendment documentation), subtract contractions, subtract churns (verified against cancellation documentation), arrive at ending ARR, and reconcile to the recognized revenue ( $ARR \div 12 =$  monthly recognized revenue). Write the reconciliation template and the variance investigation process (what triggers a deeper investigation?).

### #0910 — Financial Due Diligence Response

Write the financial due diligence response guide for a company going through an acquisition by a strategic buyer. The buyer's financial due diligence team will examine every aspect of the financial records. The guide should: organize the finance team's response (assign each DD workstream to a specific team member), set the document room standards (how are documents labeled, organized, and versioned?), prepare the management team for DD interviews (what questions will the buyer ask?), establish the issue identification protocol (what do we disclose proactively vs. wait to be asked?), and define the legal review requirement for financial DD responses.

### #0911 — Board Finance Committee Charter

Write the finance committee charter for the board of directors. The finance committee oversees: the annual budget approval, the capital allocation decisions above \$5M, the debt facility compliance, the treasury policy, the acquisition and divestiture financial evaluation, and the annual financial planning assumptions. The committee meets quarterly (in addition to the audit committee, which oversees financial reporting). Write the charter, the committee composition (minimum 3 directors with financial expertise, including 1 who qualifies as an audit committee financial expert), and the management reporting requirements.

### #0912 — Accounts Payable Efficiency Program

Write the accounts payable efficiency program. Current state: 1,200 invoices per month, 15% exception rate (invoices requiring manual intervention), average processing cost of \$12 per invoice (industry average: \$8). The efficiency program should: implement a purchase order match rate target (80% of invoices should match a PO automatically), introduce an electronic invoicing requirement for vendors above \$50K spend, automate the 3-way match process (PO + receipt + invoice), implement a supplier self-service portal (vendors can check payment status, reducing AP team inbound calls by 40%), and reduce the exception rate to 8%. Write the implementation plan and the cost reduction model.

### #0913 — R&D; Capitalization Policy

Write the R&D; capitalization policy under ASC 350-40 (internal-use software) and ASC 730 (R&D; expenses). The policy must: define the 3 stages of internal-use software development (preliminary project stage — expense; application development stage — capitalize; post-implementation stage — expense), establish the threshold for capitalization (\$50K minimum project cost to justify capitalization), define the asset useful life for each category of internal-use software (core product: 3 years; internal tools: 2 years; infrastructure: 5 years), and set the impairment review process. Write the accounting policy, the journal entry examples, and the disclosure requirement.

### #0914 — CFO Investor Communication Preparation

Write the CFO investor communication preparation guide for quarterly investor calls. The CFO's role: provide financial credibility to the CEO's strategic narrative. Preparation should cover: the financial highlights the CFO will present (3-4 key metrics with year-over-year comparisons), the guidance range and the assumptions behind it (be conservative — underpromising and overdelivering is better than the reverse), the 15 financial questions investors will ask (prepare specific answers with data), and the red flags to avoid (never say 'I'll get back to you' on financial data — CFOs must know their numbers cold).

### #0915 — Finance OKRs

Write the annual OKRs for the finance function. The finance function's value is not just in reporting the past — it is in enabling better decisions and ensuring financial health. 3 Objectives: (1) Build the company's planning capability (KRs: reduce close time to day 7, launch rolling 12-month forecast with 90% accuracy), (2) Protect and optimize financial performance (KRs: reduce burn multiple to 1.5, close compensation equity gaps for 95% of identified employees), (3) Enable data-driven decision-making (KRs: launch executive self-service analytics for all VPs, automate 3 manual reporting processes). Write each KR with baseline, target, data source, and owner.

### #0916 — ARR Waterfall Analysis

Write the ARR waterfall analysis methodology. The ARR waterfall decomposes the change in ARR from one period to another into its components. Components: Beginning ARR, + New Logo ARR (new customers signed this period), + Expansion ARR (existing customers growing their contract value), - Contraction ARR (existing customers reducing their contract value), - Churn ARR (customers who cancelled), = Ending ARR. The analysis should: calculate each component for the current quarter and compare to the prior quarter and the prior year same quarter, identify the most significant driver of ARR movement, and project the next quarter's ending ARR based on the pipeline and renewal forecast.

### #0917 — Finance Technology Stack Review

Write the annual finance technology stack review. The finance tech stack for a \$100M ARR company typically includes: ERP (financial system of record), billing system, expense management, payroll, equity management, and FP&A; tool. The review should: assess each tool's performance against its purpose (are we getting the value we expected?), evaluate integration quality (how much manual work bridges the gaps between systems?), identify the biggest technology gap (what is the most painful manual process?), model the cost and benefit of addressing the gap, and produce a technology roadmap for the next 2 years. Write the review process and the evaluation criteria.

### #0918 — Fraud Risk Management Annual Report

Write the fraud risk management annual report for the audit committee. The report should cover: the fraud risk assessment conducted this year (methodology and findings), the fraud control framework (key preventive and detective controls in place), any fraud incidents or near-misses in the year (summarized without identifying individuals), the results of fraud awareness training, the whistleblower hotline activity (report volume, categories, and resolution status), and the improvements planned for the coming year. Write the report in audit committee format.

### #0919 — FP&A; Business Partner Enablement

Write the FP&A; business partner enablement guide. Finance business partners who support non-finance leaders need to translate financial concepts into the language of the business. The guide should: help FBPs understand the business unit they support (what are their KPIs? what decisions do they face?), translate financial jargon into business language (instead of 'EBITDA' say 'operating cash generation'), build the business leader's financial literacy over time (not just answer their questions, but teach them to ask better financial questions), and create a monthly briefing format that business leaders actually read and use. Include the monthly FBP briefing template.

### #0920 — Cash Preservation Playbook

Write the cash preservation playbook for a company that has identified a runway risk: at current burn, the company has 15 months of runway and needs to either raise capital or reduce burn. The playbook should: identify the actions available at each urgency level (15 months runway: optimize but don't panic; 12 months runway: reduce discretionary spend; 9 months runway: strategic restructuring), calculate the cash impact of each action (defer 20% of capex = \$1.5M; freeze hiring = \$3M; reduce professional services = \$800K), identify the actions that reduce cash burn without impairing the business's growth capacity, and set the governance trigger for escalating from Level 1 to Level 2 to Level 3 actions.

### #0921 — Finance Function Strategy

Write the finance function strategy for the next 3 years. The finance function should evolve from: Year 1 (Build the foundation — close automation, finance business partner model launch, data warehouse for self-service analytics), Year 2 (Drive insight — predictive analytics for revenue and cash, AI-assisted financial analysis, strategic finance partnership with all business units), Year 3 (Enable growth — M&A; financial advisory capability, international treasury management, CFO as strategic co-pilot). Write the strategy, the investment required, and the capability transformation plan.

### #0922 — Monthly Close Checklist

Write the monthly financial close checklist for a SaaS company's finance team. The checklist should cover: revenue (subscription revenue recognized ratably, contract modifications processed, deferred revenue reconciled), accounts receivable (invoices sent, collections followed up, AR aging reviewed), accounts payable (invoices processed, accruals for received-not-invoiced, prepaid expenses amortized), equity compensation (stock-based compensation expense calculated, ASC 718 compliant), cash (bank reconciliations complete, restricted cash reviewed), intercompany (intercompany transactions eliminated), and financial statements (P&L, balance sheet, cash flow complete and reviewed by CFO). Write the full checklist with owners and due dates.

### #0923 — Cost Reduction Program Design

Write the cost reduction program design for a company targeting \$5M in annualized cost savings. The program should: identify savings opportunities across all cost categories (headcount is last resort — start with discretionary spend), calculate the savings potential and implementation time for each opportunity, prioritize by impact and speed (quick wins vs. structural changes), establish the governance (CFO-led cost reduction taskforce, weekly tracking), communicate to the organization with transparency about the goal without creating fear, and measure and report savings monthly to the board. Write the program design, the savings categories, and the governance model.

### #0924 — FP&A; Annual Report Card

Write the FP&A; annual report card — a self-assessment of the finance function's effectiveness. Dimensions: forecast accuracy (what was our average quarterly revenue forecast error?), business partner satisfaction (how did business unit leaders rate FP&A; support?), close timeliness (did we close on Day 7 as committed?), analytics delivery (how many analytics requests were fulfilled on time?), data quality (what was our data error rate in published reports?), and innovation (what new analytics capabilities did we introduce this year?). Write the self-assessment rubric, the scoring scale, and the improvement priorities for the coming year.

### #0925 — Financial Modeling Interview Assessment

Write the financial modeling interview assessment for a Senior Financial Analyst hire. The assessment should test: Excel proficiency (build a 3-statement financial model from a set of assumptions in 90 minutes), analytical judgment (identify the 3 most important insights in a given financial dataset), communication (present your model findings to the 'CFO' — the interviewer — in 10 minutes), and problem-solving (answer a market sizing question for an adjacent business). Write the assessment instructions, the evaluation rubric, and the passing threshold for each section.

### #0926 — Finance Communication Style Guide

Write the finance communication style guide. Finance professionals often communicate in ways that lose non-finance audiences (too many numbers, too much jargon, no narrative). The style guide should: require every financial document to lead with the key insight (not the methodology), translate every financial term into business language (EBITDA → operating profit before non-cash charges), use charts that communicate (choose the chart type that makes the insight obvious, not the one that shows the most data), write the 'so what' sentence for every data point, and calibrate the level of detail to the audience (board: high-level; CFO: full detail; business partner: functional perspective only). Include 5 before/after examples.

### #0927 — Investment Committee Charter

Write the investment committee charter for a company that wants a disciplined process for evaluating internal investment decisions. The committee approves: capital expenditures above \$500K, new headcount above approved plan, technology investments above \$250K, and M&A; targets above \$5M. Committee composition: CFO (chair), COO, CEO, and the relevant business unit VP. Meeting frequency: monthly. Quorum: 3 of 4 members. Decision standard: projects must have a payback period below 24 months or a strategic rationale approved by the CEO and board. Write the charter, the submission requirements, and the decision record format.

## SECTION 10

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76 unique prompts for senior executives

### #0928 — AI Use Case Prioritization — CREATE Format

Context: You are the Chief AI Officer presenting to the executive team. The company has received 47 AI use case suggestions from across the organization over the past quarter. The executive team wants to prioritize 5 use cases for immediate investment. You have a total AI investment budget of \$3M. Request: Design and apply a use case prioritization framework. The framework should score each use case on: strategic alignment (1-5), ROI potential (1-5), feasibility with current data and technology (1-5), time to value (1-5), and risk level (1-5, inverse — higher score = lower risk). Apply the framework to the 10 most-promising use cases from your list and produce a ranked shortlist with investment recommendations. Adjustments: Include a 'deal breaker' category — use cases that score high on ROI but cannot move forward due to regulatory constraints, data privacy issues, or technical impossibility. These should be parked, not ranked. The 10 use cases to evaluate: AI contract review (legal), AI-assisted hiring screening (HR), predictive maintenance (operations), AI customer service chatbot (support), automated financial close (finance), AI sales forecasting (sales), generative AI for marketing copy (marketing), AI-powered code review (engineering), AI meeting summarization (all teams), AI-driven dynamic pricing (product). Tone: Analytical and decisive. The executive team needs a recommendation, not a framework overview.

### #0929 — AI Governance Framework — One-Shot

Write the company AI governance framework. The company is a \$300M insurance company that has just deployed 3 AI systems: an AI underwriting assistant, an AI fraud detection system, and an AI customer service chatbot. The EU AI Act classifies the underwriting and fraud systems as high-risk. Use this governance framework structure: '1. AI Governance Principles (5-6 principles the company will always uphold) 2. AI Risk Classification (how we classify new AI systems — High/Medium/Limited/Minimal) 3. Pre-Deployment Review Process (what must be completed before an AI system goes live) 4. AI Oversight Structure (who is responsible for what — CAIO, legal, business units) 5. Ongoing Monitoring Requirements (what is monitored, how often, by whom, escalation process) 6. AI Incident Response (what triggers an incident, who is notified, how it is managed) 7. Human Oversight Requirements (where humans must remain in the loop) 8. Annual Review Process (how the framework is updated)' Write the full governance framework for the insurance company described above.

### #0930 — AI Upskilling Program Design — Few-Shot

Design a company-wide AI upskilling program for a 2,000-person financial services company. 70% of the workforce has limited AI exposure. The program has a \$500K budget and 18 months to show measurable results. Examples of AI upskilling programs that succeeded vs. failed: Successful example (Goldman Sachs-style): 'Mandatory AI fluency training for all 38,000 employees, with role-based tracks (executives get strategy track, analysts get tools track, tech gets implementation track). Completion is tied to annual performance review. Result: 85% completion in year 1, measurable increase in AI tool adoption.' Failed example: 'Optional lunch-and-learn series, good content but no mandate, no measurement, no tie to performance. After 6 months, only 8% of employees had attended a session. Program quietly cancelled.' Successful example (Accenture model): 'Created internal AI Champions — 500 employees who went through intensive training and then became the internal evangelists and first-call support for their departments. Champions had 10% protected time for AI work. Result: AI adoption rate 4x higher in departments with Champions.' Design the full program using these learnings. Include: the curriculum (by role level), the delivery model, the measurement approach, the incentive structure, and the 18-month implementation plan.

### #0931 — AI Safety Policy for Enterprise — Chain-of-Thought

My company is deploying Claude (by Anthropic) as an internal knowledge management and productivity tool for 1,500 employees. I need to write the AI safety and acceptable use policy. Walk me through how to write an effective policy step by step. Step 1: What are the actual risks I am trying to mitigate? List them specifically for an enterprise AI deployment. Step 2: What behaviors do I need to prohibit? How specific should the prohibition language be? Step 3: What behaviors do I need to require? (Not just 'don't do bad things' — what must employees DO to use AI responsibly?) Step 4: How do I handle the data classification issue? Which employee data, customer data, and confidential company data can and cannot be entered into the AI tool? Step 5: What are the consequences for policy violations? Step 6: How do I write the policy so it is actually read and followed, not filed and ignored? Work through each step, then write the complete policy.

### #0932 — AI ROI Calculation Framework — Role-Based

Act as a management consultant who specializes in technology ROI measurement. My company has invested \$2.5M in AI over the past 18 months across 6 initiatives. The CFO wants to know if it was worth it. The problem: nobody measured ROI before the investments were made, so we have no baselines. Help me build a retrospective ROI framework: 1. For each of the 6 use case types below, explain how to establish a retrospective baseline (what data exists that shows what 'before AI' looked like) 2. Explain how to measure current-state performance 3. Show how to attribute the improvement to AI vs. other factors 4. Build a simple ROI calculation The 6 use cases: (1) Customer service AI chatbot, (2) AI-powered contract review, (3) AI meeting summaries, (4) AI-assisted code review, (5) AI financial close automation, (6) AI sales forecasting Give me both the framework and a worked example for use case #1.

### #0933 — AI Vendor Evaluation for LLM Platform

Write the 20-criteria evaluation framework for selecting an enterprise LLM platform. The company is evaluating OpenAI Enterprise, Anthropic Claude for Enterprise, Google Gemini Enterprise, and Azure OpenAI. Criteria should cover: security and data privacy (does our data train their models?), model performance on our specific use cases (not generic benchmarks), context window length, integration with existing tools, enterprise SLA and uptime, pricing model and cost predictability, regulatory compliance (EU AI Act, GDPR), audit trail and logging capability, rate limits and throughput, model versioning and stability, support quality, and vendor stability (financial health, roadmap credibility). Include a scoring rubric and decision matrix.

### #0934 — Generative AI Acceptable Use Policy

Write the generative AI acceptable use policy for a 500-person law firm. The firm handles sensitive client matters and is subject to attorney-client privilege, bar association rules on confidentiality, and data protection regulations. The policy must cover: which AI tools are approved for which use cases, what client information can be entered into AI systems (hint: very limited), how AI-generated content must be reviewed before use with clients, the disclosure requirements (when must clients be told AI was used?), prohibited uses (generating legal advice without attorney review), and the consequences for violations. Reference Model Rules of Professional Conduct.

### #0935 — AI Model Risk Management Policy

Write the model risk management policy for an AI system that makes loan underwriting decisions. The policy should cover: model development standards, validation requirements before deployment (who validates, what is tested, what performance thresholds are required), ongoing monitoring (model drift detection, performance degradation thresholds, retraining triggers), human oversight requirements (what decisions require human review), bias testing (which protected characteristics, what metrics, what intervention thresholds), documentation requirements, and the annual review process. Reference OCC/Fed model risk management guidance (SR 11-7).

### #0936 — AI Innovation Challenge Design

Design an internal AI innovation challenge for a 3,000-person manufacturing company. The challenge should: invite employees to submit AI use case ideas, evaluate them through a transparent process (criteria: ROI potential, feasibility, strategic alignment), select 5 finalists to prototype with a \$10K budget each, present to a leadership panel, and fund the winner with a \$200K implementation budget. Design: the submission process, the evaluation criteria and panel, the prototype phase (what support is provided), the final presentation event, and the recognition and rewards for participants and winners. Include the launch communication and a submission template.

### #0937 — Responsible AI Culture Program

Write the responsible AI culture program for a company that wants to go beyond policy compliance to actually build AI-ethical behavior into how employees work. The program should cover: the core responsible AI values the company stands for (not generic — specific and meaningful), the training curriculum (not just 'here are the rules' — case-based learning), the reporting mechanism for AI ethics concerns (with psychological safety protections), the recognition program for responsible AI behavior, how leaders are expected to model AI ethics in their own work, and how the program is measured and improved annually. Make it feel like a culture program, not a compliance program.

### #0938 — AI Strategy Presentation for Non-Technical Board

Write the 20-minute AI strategy presentation for a board of directors who are not technical. The board has 7 members: 3 financial backgrounds, 2 operations backgrounds, 1 legal, 1 marketing. They understand AI exists and know competitors are investing, but they are skeptical of AI hype and worried about risk. The presentation should: build a shared understanding of what AI can actually do (vs. what headlines say), explain the company's current AI maturity honestly, present 3 strategic options (conservative, moderate, aggressive investment), make a recommendation with the specific board decision needed, and address the top 3 risk concerns without dismissing them. Do not use jargon. Do not oversell.

### #0939 — AI Center of Excellence Charter

Write the AI Center of Excellence (COE) charter for a large enterprise. The COE's mandate: accelerate AI adoption, maintain governance standards, and build internal AI capability. Charter should cover: mission and vision, governance structure (who leads, steering committee composition, reporting line), service model (what does the COE do for business units: consulting, training, shared tools, project oversight), funding model (central budget vs. chargeback to business units), staffing model (dedicated team vs. rotating assignments from business units), success metrics (# of AI initiatives supported, business value generated, AI literacy scores, AI governance compliance rate), and the 12-month roadmap from launch.

### #0940 — AI Literacy Curriculum Design

Design the AI literacy curriculum for a 5,000-person organization. The curriculum has 4 levels: (1) AI Awareness (2 hours, all employees) — what AI is, how it affects their work, responsible use; (2) AI User (8 hours, all knowledge workers) — hands-on prompt engineering, AI tools for their function, how to evaluate AI outputs; (3) AI Champion (20 hours, 5% of employees) — advanced prompting, use case identification, change management for AI adoption; (4) AI Leader (40 hours, VP+ and CAIO track) — AI strategy, ROI measurement, governance, ethical leadership. For each level, define the format (e-learning, workshop, hands-on), assessment method, and how completion is tracked.

### #0941 — AI Project Post-Mortem Template

Write the AI project post-mortem template for use after any AI initiative (successful or failed). Sections: Project Summary (goal, timeline, investment, outcome), Technical Assessment (model performance vs. target, data quality issues, infrastructure challenges), Business Impact (actual ROI vs. projected, adoption rate, user feedback), Process Assessment (what went well in the development process, what were the bottlenecks), Governance Assessment (were ethics reviews completed on time? were stakeholders adequately consulted?), Lessons Learned (top 5 lessons — specific enough to change future behavior), Recommendations (changes to the AI development process based on this project), and Sign-off (CAIO, business sponsor, engineering lead).

### #0942 — Machine Learning Model Documentation Standard

Write the model documentation standard for all production ML models. Documentation requirements: (1) Model Card — model purpose, training data summary, performance metrics by segment, known limitations and failure modes, intended use and out-of-scope uses; (2) Data Lineage — data sources, transformation steps, data quality metrics; (3) Deployment Documentation — infrastructure, monitoring setup, alert thresholds; (4) Governance Record — pre-deployment review approvals, bias testing results, regulatory classification, review date. The standard should specify: who is responsible for maintaining each section, the minimum documentation required before a model can go to production, and the annual documentation review requirement.

### #0943 — AI Prompt Engineering Standard

Write the enterprise prompt engineering standard for a company that has 200+ prompts in production (in customer service, legal review, sales automation, and finance). The standard should cover: prompt versioning (how prompts are versioned, tested, and approved before going live), prompt testing requirements (what tests are run before a prompt is approved — accuracy on golden dataset, edge case testing, adversarial testing), change management (who approves prompt changes? what is the deployment process?), documentation requirements (what context, rationale, and performance data must be documented for each prompt), and the review cycle (how often are production prompts reviewed for drift and performance?).

#### #0944 — AI Use Case Business Case Template

Write the standardized AI use case business case template. All AI use case proposals must complete this template before receiving investment approval. Sections: Executive Summary (problem statement, proposed solution, investment ask, expected ROI), Problem Statement (current state, pain points, quantified impact of the problem), Proposed Solution (AI approach, build vs. buy vs. partner recommendation, technical requirements), Financial Model (investment: one-time and ongoing costs; benefits: cost savings, revenue uplift, risk reduction; ROI and payback period), Implementation Plan (phases, milestones, team requirements), Risk Assessment (technical, business, ethical risks with mitigations), Governance Requirements (risk classification, ethics review, compliance requirements), and Success Metrics (how will we know it worked?).

#### #0945 — AI Operations Runbook Template

Write the AI operations runbook template for a production AI system. The runbook covers: system overview (purpose, architecture, dependencies, SLA), monitoring (what is monitored, alert thresholds, monitoring dashboard links), incident response (P1 definition and response: who is paged, what is done first; P2/P3 response), common failure modes (symptom → likely cause → resolution steps — 10 specific scenarios), model degradation playbook (how to detect that model quality is degrading, what triggers retraining, who approves model updates), rollback procedure (how to roll back to a prior model version), and contact list (engineer on-call, vendor support, CAIO escalation). This is a living document — updated after every incident.

#### #0946 — Generative AI Use Case Library

Write the generative AI use case library for a professional services firm. Organize by function: (1) Client Delivery — first draft of deliverables, research synthesis, data analysis narrative, presentation creation; (2) Business Development — proposal drafts, RFP responses, case study writing, LinkedIn outreach personalization; (3) Finance & Operations — report writing, policy drafting, budget commentary; (4) Talent — job descriptions, interview guides, onboarding content, learning materials; (5) Knowledge Management — meeting summaries, knowledge base articles, best practice documentation. For each use case, include: the recommended AI tool, the optimal prompt structure (short example), the quality check required before delivery, and the expected time saving.

#### #0947 — AI Workforce Planning Study

Write the workforce planning study framework for assessing the impact of AI on headcount requirements over the next 5 years. The study should: inventory the tasks performed by each job family, assess the AI automation potential of each task category (using OECD/McKinsey task-automation research as a reference), model three automation scenarios (conservative 20%, moderate 40%, aggressive 60% task automation), project the headcount implications under each scenario, identify the roles most at risk (high task-automation potential + low uniquely human skills), identify the roles that will grow (AI oversight, AI training, higher-complexity work), and recommend the upskilling investments and hiring strategy to manage the transition responsibly.

#### #0948 — Vendor AI Claims Evaluation Guide

Write the guide for evaluating AI vendor claims. In 2025, every software vendor claims their product uses AI. The guide should help procurement and technology leaders distinguish genuine AI capability from AI-washing. Cover: what questions to ask (not 'do you use AI?' but 'show me the model performance on a benchmark'), how to evaluate AI performance claims (what benchmarks are relevant for your use case?), the red flags for AI-washing (AI used only in marketing, no technical documentation available, can't explain how the model works), how to request a proof-of-concept before committing, and the AI-specific contractual protections to require (model performance guarantees, notification of model changes, data protection addendum).

### #0949 — AI Change Management Plan

Write the change management plan for deploying an AI-powered customer service chatbot that will handle 40% of tier-1 support inquiries previously handled by human agents. The plan must address: the customer service team's fear of job displacement (40 agents, some with 8+ years at the company), how to redeploy agents to higher-value work (complex cases, proactive outreach), the retraining program (from ticket resolution to AI supervision and complex case management), the customer communication (some customers will reject AI service), the quality monitoring process during transition, and the success metrics. Be honest: 15% of agents may not be able to make the transition and the plan should address this reality.

### #0950 — AI Literacy Assessment Tool

Write the AI literacy assessment tool for screening new hires and benchmarking existing employees. The assessment should test: understanding of AI basics (what LLMs can and cannot do), practical prompt engineering skills (given a task, write a prompt), critical evaluation (identify flaws in an AI-generated document), responsible AI judgment (identify when AI use is inappropriate), and tool proficiency (can they use the company's approved AI tools efficiently?). Design a 20-question assessment with 3 difficulty levels. Include the scoring rubric and the development recommendations for each score band.

### #0951 — AI Product Roadmap Communication

Write the external AI product roadmap communication for enterprise customers. The communication should: explain the company's AI product vision clearly, commit to specific features with approximate timelines (be honest about uncertainty — don't over-promise), address the security and privacy questions that enterprise customers always ask, explain how customers can influence the AI roadmap, and set realistic expectations about AI capabilities (avoid the hype trap). This is a delicate communication — customers want to believe in the AI vision, but over-promising and under-delivering damages trust permanently.

### #0952 — Responsible AI Annual Report

Write the template for a Responsible AI Annual Report. Sections: AI governance overview (governance structure, policies in place), AI deployments summary (number of AI systems, risk classification, compliance status), Ethics and fairness (bias testing results, remediation actions, notable cases), Transparency (how we explain AI to affected individuals), Environmental impact (compute energy consumption and offset), Human oversight (where humans remain in the loop), Incidents and near-misses (what went wrong, what we learned), Looking ahead (planned improvements to responsible AI practice). Each section should combine narrative and data.

### #0953 — AI Skill Credentialing Framework

Write the internal AI skill credentialing framework. Employees who complete the AI training program earn credentials that appear in their HR profile and influence internal opportunity matching and compensation reviews. Credentials: AI Practitioner (basic prompting, approved tool use, responsible AI principles — all employees), AI Power User (advanced prompting, use case design, AI output evaluation — knowledge workers), AI Champion (facilitating AI adoption in teams, training peers, identifying AI opportunities — 5% of workforce), AI Product Builder (creating AI-powered tools and workflows — technical roles), AI Leader (developing AI strategy, governance, and organizational capability — VP+ and CAIO track). For each credential, define the assessment, the maintenance requirement, and the benefit.

### #0954 — AI Ethics Training Curriculum

Write the AI ethics training curriculum for a company deploying AI in HR, finance, and customer service. The curriculum should be practical, not philosophical — each module should end with a specific behavioral change. Module 1 (1 hour): What can go wrong — real AI failures and what they mean for our company. Module 2 (1 hour): Responsible AI principles — from theory to daily decisions. Module 3 (1 hour): Working with AI outputs — verification, attribution, and the human judgment requirement. Module 4 (1 hour): Escalation and reporting — when to raise an AI ethics concern and how. Assessment: a scenario-based quiz where employees make decisions in 5 AI ethics situations.

### #0955 — AI Build vs. API vs. Fine-Tune Guide

Write the decision guide for AI product leaders choosing between: (1) building a custom model from scratch, (2) calling a foundation model API with prompt engineering, or (3) fine-tuning an existing model on proprietary data. For each option, describe: the use cases it is right for, the cost implications, the time to production, the maintenance requirements, the performance trade-offs, and the data requirements. Include a decision matrix with 8 criteria. Most products should start with option 2 — explain why and under what conditions options 1 and 3 become appropriate.

### #0956 — AI Model Retirement Policy

Write the AI model retirement policy. AI models are not like traditional software — they can degrade over time (data drift) and there is no standard 'end of life' process. The policy should cover: the signals that trigger a retirement review (accuracy below threshold, vendor deprecation, regulatory non-compliance), the review process (who decides, what data is required), the transition period (how long does the model stay available for fallback?), the data archiving requirements (preserve training data and evaluation records for regulatory audit), and the communication requirements (who is notified when a model is retired — users, customers, regulators). This policy is for internal AI models and third-party LLMs used in production.

### #0957 — AI Spending Governance

Write the AI spending governance framework. AI spending is different from traditional IT spending: costs can scale unexpectedly (token costs per API call are variable, not fixed), the business value is harder to measure, and individual employees can make commitments through tool sign-ups. The framework should cover: the approved AI tools list and budget allocation, the cost monitoring process (who watches the API cost dashboard?), the threshold for escalation (when a project's AI cost exceeds estimate by more than 20%), the process for approving new AI tools (standard procurement + AI governance review), and the annual AI spend audit (review all AI costs vs. business value delivered).

### #0958 — AI Strategy Presentation Q&A; Preparation

Write the Q&A; preparation guide for an executive presenting the AI strategy to the board. The guide should prepare the executive for the 15 most likely tough questions from a board that includes both AI enthusiasts and AI skeptics. Questions to prepare for: 'How is our AI strategy different from our competitors' AI strategy?', 'What happens if OpenAI/Anthropic/Google raises prices significantly?', 'How are we measuring ROI — real numbers?', 'What is our data privacy liability if an AI system makes a wrong decision?', 'Are we building for AI or are we using AI as a marketing story?', 'What do our customers think of our AI features — have we asked them?', 'Where could AI create an unacceptable risk for the company?', 'Who is accountable when an AI system fails?' For each question, provide the honest and confident answer.

### #0959 — AI Governance Charter

Write the AI governance charter for a company establishing its first AI governance council. The charter should define: the council's composition (CTO, CPO, General Counsel, CHRO, and CFO — these are the key stakeholders for AI risk), the council's scope (all AI systems in production and all new AI systems before deployment), the council's decision rights (what can the council approve vs. what requires board approval?), the meeting cadence (monthly operational review, quarterly strategic review), and the secretariat function (who manages the council's agenda and records?).

### #0960 — AI Vendor Due Diligence

Write the AI vendor due diligence framework for evaluating large language model providers. Evaluation dimensions: (1) Model performance on our specific use cases (benchmark results on our tasks, not general benchmarks), (2) Data privacy (does the vendor train on our data? where is our data processed? what is the data retention policy?), (3) Security (SOC 2 certification, penetration test results, access controls), (4) Reliability (API uptime SLA, incident history, latency SLA), (5) Pricing (token-based pricing volatility — what is the maximum price increase provision?), (6) Vendor viability (financial health, investment backing, key person concentration). Write the evaluation scorecard.

### #0961 — AI Pilot Program Design

Design the AI pilot program framework for evaluating a new AI tool before company-wide deployment. The pilot should: have a clear hypothesis ('we believe this AI tool will reduce time-spent-on-task X by 30% for the pilot group'), select a representative pilot group (20-30 users who are typical of the deployment population — not early adopters only), define the measurement methodology (pre-pilot baseline, post-pilot measurement, control group if feasible), run for 8 weeks (long enough to get past the novelty effect), and produce a go/no-go recommendation based on pre-defined success criteria. Write the pilot design template.

### #0962 — Generative AI Policy for Legal Team

Write the generative AI usage policy for the legal team. The legal context creates specific risks: (1) AI hallucinations in legal documents can create liability, (2) client confidentiality means no client data into public AI tools, (3) professional responsibility rules vary by jurisdiction on the use of AI in legal work. The policy should: prohibit the use of any non-approved AI tool for legal work, require human review of all AI-generated legal text before use, require disclosure of AI use in external documents where required by bar association rules, and specify the approved AI tools (enterprise AI tools with confidentiality protections).

### #0963 — AI Use Case Prioritization Matrix

Write the AI use case prioritization matrix for a company with 15 proposed AI use cases. The matrix should score each use case on: Business impact (revenue impact, cost savings, or risk reduction), Feasibility (data availability, technical complexity, integration requirements), Time to value (can this be deployed in 90 days?), Risk level (regulatory, ethical, reputational risk), and Strategic alignment (does this support the company's 3-year strategy?). Calculate a weighted score for each use case. The top 3 use cases by score become the company's AI priorities for the next 6 months.

### #0964 — Machine Learning Deployment Checklist

Write the machine learning model deployment checklist. Before any ML model goes to production: (1) Performance validation (accuracy, precision, recall, or other task-specific metrics meet threshold), (2) Bias audit (the model's outputs are not systematically biased against any protected group), (3) Data privacy review (training data compliance with applicable privacy laws), (4) Security review (model cannot be used for adversarial attacks, data poisoning risks assessed), (5) Explainability documentation (model card written), (6) Monitoring plan (how will model drift be detected?), (7) Rollback plan (how do we revert if the model fails in production?), (8) Human oversight procedure (for high-stakes decisions, how is human review incorporated?).

### #0965 — AI Upskilling Program for Technical Teams

Design the AI upskilling program for a 50-person engineering team. The program should develop 3 capability tiers: (1) AI-Aware (all engineers — understand AI capabilities and limitations, prompt engineering basics, AI tool integration), (2) AI-Practitioner (25 engineers — ML model evaluation, AI API integration, AI feature development), (3) AI-Builder (10 engineers — ML model development, fine-tuning, AI architecture design). For each tier: the learning curriculum, the assessment methodology, the time investment required, and the certification credential. Total program duration: 12 months. Investment: \$150K in tools, courses, and instructor time.

### #0966 — AI in Customer Service: Implementation Guide

Write the implementation guide for deploying an AI chatbot for tier-1 customer support. The implementation should cover: use case scope (the AI handles password resets, billing questions, and standard feature questions — it escalates anything requiring judgment), training data requirements (what historical ticket data is needed?), the escalation protocol (how does the AI know when to hand off to a human agent?), the human agent transition experience (the agent receives the conversation history and context), the quality monitoring process (weekly review of AI responses for accuracy and tone), the customer disclosure (customers know they are talking to an AI), and the success metrics (ticket deflection rate, CSAT for AI-handled tickets, agent satisfaction).

### #0967 — AI Regulatory Compliance Map

Write the AI regulatory compliance map for a company operating in the US, EU, and UK. Regulations: (1) EU AI Act (applicable if the company sells AI products in the EU — risk categorization, transparency, human oversight requirements), (2) UK Algorithmic Transparency Standard (applies to public sector — note if the company sells to UK government), (3) US Executive Order on AI (federal procurement requirements if selling to US government), (4) GDPR/UK GDPR (AI decisions about individuals require a legal basis, transparency, and rights), and (5) Sector-specific regulations (financial services AI regulations, healthcare AI regulations). For each regulation, state the applicability, the key requirements, and the compliance status.

### #0968 — AI Model Card Template

Write the AI model card template for documenting internally developed AI models. A model card documents: Model details (name, version, intended use, out-of-scope uses), Training data (data sources, data quality, any known biases in the training data), Evaluation results (performance metrics, disaggregated performance by demographic group), Ethical considerations (fairness assessment, potential harms and how they are mitigated), Limitations (known failure modes, conditions under which the model performs poorly), and Recommendations (how to use this model responsibly, what human oversight is required). Write the complete template with guidance for each section.

### #0969 — AI Partnership Evaluation Guide

Write the evaluation guide for AI technology partnerships. The company is considering a strategic partnership with an AI provider. Evaluation dimensions: Technology (is their AI genuinely best-in-class for our use case, or is it commoditized?), Data access (what data do they need from us? what are we giving up?), Exclusivity risks (are we creating a dependency on a single AI provider?), Economic terms (revenue share, API cost structure, pricing increase protections), Strategic alignment (does their product roadmap align with our customer needs?), and Competitive risk (could they become a direct competitor?). Write the evaluation scorecard and the negotiation priorities.

### #0970 — AI Incident Severity Classification

Write the AI incident severity classification system. Not all AI failures are equal. The classification system should define 4 severity levels: P1 (Critical: AI system causes harm to customers or employees, regulatory violation, or material financial loss — immediate shutdown required), P2 (High: AI system producing systematically incorrect outputs that are being acted on — requires fix within 24 hours), P3 (Medium: AI system degraded performance, below SLA but not causing active harm — fix within 72 hours), P4 (Low: Minor issues, cosmetic errors, single-instance problems — fix in next sprint). Write the escalation matrix and the communication requirement for each level.

### #0971 — AI Center of Excellence Launch Plan

Write the launch plan for an AI Center of Excellence (COE). The COE is a centralized team that accelerates AI adoption across the company. The launch plan should cover: team composition (AI engineers, data scientists, a product manager, a responsible AI lead, and a change management lead — 6-8 people initially), the COE's mandate (build shared AI infrastructure, evaluate new AI tools, support business units in deploying AI, maintain the AI governance framework), the COE's engagement model (consulting model: business units bring use cases to the COE), the first 90-day priorities, and the success metrics at 6 months and 12 months.

### #0972 — AI Skills Taxonomy for the Organization

Write the AI skills taxonomy for a 500-person non-technical company. The taxonomy should define the AI skills required at each job level: Individual Contributors (AI tool proficiency — use approved AI tools effectively, evaluate AI outputs critically, understand privacy requirements), Managers (AI workflow design — identify AI opportunities in their team's work, manage AI-assisted processes, evaluate AI quality), Directors (AI strategy — develop AI adoption plans for their function, build business cases for AI investments), and Executives (AI leadership — define AI strategy, govern AI risk, build AI culture). For each level, map specific skills and knowledge areas.

### #0973 — Responsible AI Framework

Write the responsible AI framework for a company deploying AI in HR, finance, and customer-facing products. The framework should have 5 pillars: (1) Fairness (AI systems are tested for bias and do not discriminate against protected groups), (2) Transparency (affected individuals know when AI is being used in decisions that affect them), (3) Accountability (every AI system has a named owner accountable for its performance and compliance), (4) Safety (AI systems are monitored for harmful outputs and have shutdown protocols), and (5) Privacy (AI systems handle personal data in compliance with applicable privacy laws). For each pillar, write the specific policy requirements, the monitoring requirements, and the audit process.

### #0974 — AI Investment Evaluation Framework

Write the AI investment evaluation framework for the CEO and CFO. AI investments are different from traditional software investments: costs are variable (scale with usage), benefits are often indirect (productivity gains, not revenue lines), and the technology is evolving rapidly (investments can become obsolete quickly). The framework should: require all AI investments above \$500K to have a business case with a quantified ROI hypothesis (not 'AI will improve efficiency' but 'AI will reduce time spent on task X by 40%, saving 200 hours/month at \$75/hour = \$180K/year'), a maximum payback period (24 months), and a sunset review trigger (if the AI investment does not show ROI after 12 months, the investment is reviewed for continuation or discontinuation).

### #0975 — AI Procurement Governance

Write the AI procurement governance policy. AI tools require different procurement governance than traditional software because: (1) AI tools often process sensitive data that must not leave the company's security perimeter, (2) AI tool quality degrades over time without maintenance and monitoring, (3) AI tools can introduce regulatory risk if not properly assessed. The policy should: require all AI tools to go through an enhanced procurement review (standard procurement review + AI risk assessment), prohibit any AI tool that trains on company data without explicit consent, require a security review before any AI tool is approved for use with customer data, and create an approved AI tools list that is reviewed quarterly.

### #0976 — AI Progress Report for Board

Write the quarterly AI progress report for the board. The report should cover: AI systems in production (number of systems, their status, key performance metrics), AI investments deployed vs. budget (are we on track?), AI ROI realization (quantified benefits from AI investments — what productivity savings and revenue impacts have been measured?), AI risk incidents (any safety incidents, bias findings, or regulatory issues?), AI talent and capability progress (headcount, training completion, skill assessment scores), and the AI strategy milestones for the next quarter. Format: 4-6 slides, data-heavy, narrative concise.

### #0977 — AI Documentation Standards

Write the AI documentation standards for the company's AI deployments. Every AI system in production requires 4 documentation artifacts: (1) Technical specification (model architecture, training data, evaluation results), (2) Model card (see earlier template — intended use, limitations, ethics), (3) Operational runbook (how to monitor, how to handle incidents, how to update), and (4) User guide (for the humans who work with or alongside the AI system). Documentation must be maintained and reviewed at least annually. Assign documentation ownership to the AI system owner. Audit documentation completeness quarterly.

### #0978 — AI Ethics Committee Charter

Write the charter for the company's AI Ethics Committee. The committee reviews AI systems that have significant ethical implications: AI in hiring, AI in performance management, AI in credit decisions, and AI in content moderation. Charter elements: composition (external ethics advisor, internal legal, HR, product, and data science representatives), scope (all AI applications that affect individuals in high-stakes decisions), review process (AI system submission → committee review within 30 days → approval, conditional approval, or rejection), authority (the committee can block deployment of any AI system), and reporting (quarterly report to the board on AI ethics reviews conducted).

### #0979 — AI Learning Path for Business Leaders

Write the AI learning path for business leaders (non-technical executives) who need to understand AI well enough to make good decisions about AI investments and governance. The learning path should have 3 levels: Foundation (2 hours: what AI is, what it can and cannot do, the business impact of AI — required for all executives), Practitioner (4 hours: understanding AI products, evaluating AI vendors, governing AI risk, ROI measurement — required for VPs and above), and Expert (8 hours: AI strategy development, building AI organizations, responsible AI leadership, industry-specific AI applications — optional for C-suite). Write the curriculum for each level.

### #0980 — AI Prompt Standards Library

Write the AI prompt standards library for the company. Different teams use AI for different tasks, and without standards, output quality is inconsistent. The library should document standard prompts for: (1) Executive communication drafting (the system prompt that produces the company's voice and tone), (2) Customer communication (the guardrails and context that must be included in all customer-facing AI communication), (3) Financial analysis (the calculation check requirements and disclaimer requirements), (4) Legal document review (the scope and limitation prompts that prevent over-reliance on AI for legal decisions), and (5) Research and analysis (the citation and source requirement prompts). Include the prompt quality checklist.

### #0981 — AI Governance Maturity Assessment

Write the AI governance maturity assessment tool. The assessment measures where the company is on the AI governance maturity curve. 5 levels: Level 1 (Ad hoc — no AI governance structure), Level 2 (Developing — some policies exist but inconsistently applied), Level 3 (Defined — policies in place, applied to major AI systems), Level 4 (Managed — systematic governance with measurement and audit), Level 5 (Optimized — continuous improvement of AI governance based on incident data and evolving regulation). For each level, define the criteria across 6 dimensions: Policy, Process, Organization, Technology, Data, and Culture. Include the assessment scorecard and the improvement roadmap.

### #0982 — AI Strategy One-Page

Write the one-page AI strategy document for a company that wants to communicate its AI direction clearly to the board, employees, and customers. The one-pager should cover: the AI vision (what does this company look like in 3 years if AI works as hoped?), the AI priorities (the 3 most important AI initiatives), the AI principles (how will this company use AI responsibly?), and the AI progress milestones (the 3 milestones that demonstrate AI strategy is working). Tone: ambitious but honest — this is not marketing; it is a strategic commitment.

### #0983 — AI Model Evaluation Framework

Write the evaluation framework for comparing large language model providers (OpenAI, Anthropic, Google Gemini, Meta Llama). Evaluation dimensions: performance on the company's specific tasks (document summarization accuracy, code generation quality, structured data extraction), total cost of ownership (per-token pricing × expected volume), privacy and data governance (does the model train on our data?), reliability (API uptime, latency SLAs), fine-tuning capability, and enterprise support quality. Write the evaluation scorecard with scoring guidance for each dimension.

### #0984 — AI Risk Heat Map

Build the AI risk heat map for a company deploying 8 AI systems across different business functions. For each AI system, assess 5 risk dimensions: accuracy risk (what happens if the AI is wrong?), fairness risk (could the AI disadvantage protected groups?), privacy risk (what personal data is processed?), security risk (how could the system be manipulated?), and operational risk (what happens if the system fails?). Plot each system on a 2×2 risk map (probability × impact). The top-right quadrant systems require immediate risk mitigation investment.

### #0985 — AI in Regulated Industries Guide

Write the guide for using AI in highly regulated industries (financial services, healthcare, legal). The guide should: explain the regulatory constraints on AI use in each industry (financial services: model risk management requirements; healthcare: FDA AI guidance; legal: professional responsibility rules), describe the documentation and validation requirements for AI models used in regulated contexts, and propose a compliance-first AI adoption approach that enables innovation while managing regulatory risk. Include a 'safe AI use cases' list and a 'high-risk AI use cases' list for each industry.

### #0986 — AI Product Differentiation Strategy

Write the AI product differentiation strategy. As AI becomes a commodity feature (every competitor adds 'AI-powered' to their marketing), differentiation requires more than AI features. True AI differentiation comes from: proprietary data (your AI improves because it learns from data competitors don't have), workflow integration (your AI is embedded in the workflow, not bolted on), network effects (your AI improves because more users make it smarter), and vertical specialization (your AI is trained on domain-specific knowledge that general AI lacks). Write the differentiation strategy for each approach and the investment required.

### #0987 — AI Ethics Review Board Design

Write the design for an external AI ethics review board. The external ethics review board provides independent oversight of the company's most sensitive AI deployments. Composition: 3-5 external members (AI ethics researchers, civil society representatives, domain experts), rotating chair, 2-year terms. Scope: review all AI systems classified as high-risk or critical, provide binding recommendations on AI systems affecting protected groups, publish an annual transparency report on review activity. Governance: the board operates independently from management — they are appointed by the board of directors, not the CEO.

### #0988 — AI Capability Sourcing Strategy

Write the AI capability sourcing strategy. The company needs 5 AI capabilities: natural language processing, computer vision, predictive analytics, recommendation systems, and AI agents. For each capability, the sourcing decision: build (use open-source models and build in-house expertise), buy (purchase a commercial AI service), or partner (strategic relationship with an AI company). Write the sourcing decision for each capability with the rationale, the investment required, and the build-buy-partner criteria.

### #0989 — AI Communication Strategy for Customers

Write the AI communication strategy for telling customers how AI is used in the product. Customers increasingly want to know: what AI is being used in the product, what data is used to train the AI, whether the AI learns from their data, how AI decisions can be explained, and what human oversight exists. The communication strategy should: create a transparent AI disclosure page, train the CS team on customer AI questions, design a proactive AI update for customers when significant AI changes are made, and handle the media-driven fears about AI (customer concerns are often driven by AI news coverage, not by the actual product).

### #0990 — AI and Intellectual Property

Write the AI and intellectual property guide for product leaders. Key questions: (1) Who owns the copyright to AI-generated content? (current law: output created autonomously by AI is likely not copyrightable in the US — what does this mean for your product?), (2) Is training data that includes copyrighted material a copyright violation? (currently unsettled — what is your legal risk exposure?), (3) How do you protect proprietary AI models? (trade secret law is currently the strongest protection — what documentation is required?), (4) What are the IP implications of using open-source AI models? (licenses vary — some are commercially restrictive). Write the policy recommendations for each question.

### #0991 — AI Transformation Program

Write the 3-year AI transformation program for a company that is currently an AI follower (no AI in production) and wants to be an AI leader in its sector. Year 1: Foundation (data infrastructure, AI governance, pilot deployments, team capability building). Year 2: Scale (AI in 3+ core product areas, 50% of knowledge workers using AI tools, first AI-native process redesign). Year 3: Lead (AI-first product strategy, external AI brand, first AI product generating standalone revenue, recognized as sector AI leader). Write the investment, the organizational changes, the cultural enablers, and the success metrics for each year.

### #0992 — AI Regulatory Affairs Program

Write the AI regulatory affairs program for a company whose AI products are attracting regulatory attention. The program should: establish a dedicated regulatory AI function (reporting to the General Counsel), build relationships with relevant regulators before they come to the company, monitor the EU AI Act, US AI EO, and UK AI regulations for compliance implications, develop the company's regulatory AI public policy positions, and prepare the legal and technical documentation required for regulatory inquiries. Include the regulatory landscape map and the compliance gap assessment.

### #0993 — AI Supplier Assessment

Write the AI supplier assessment framework for evaluating AI component suppliers and model providers. The assessment should: evaluate the supplier's security certifications (SOC 2, ISO 27001), their data privacy practices (what data do they retain? what do they use for model training?), their AI safety practices (do they red-team their models? do they have safety teams?), their business continuity (what happens to our AI deployment if they are acquired or shut down?), their pricing stability (what pricing protection is available?), and their alignment with our responsible AI standards. Score each dimension and make a tiering recommendation.

### #0994 — AI-Ready Culture Assessment

Write the AI-ready culture assessment tool. Some organizations are culturally ready for AI (they learn fast, experiment comfortably, and trust data-driven decisions) and some are not (they are risk-averse, change-resistant, and politics-driven). The assessment should measure: learning agility (how quickly does the organization adopt new tools?), experimentation tolerance (is it safe to try something that might fail?), data-driven decision-making (are decisions made with data or with HiPPO — highest-paid person's opinion?), collaboration across functions (AI projects require cross-functional teams — does that work here?), and technology adoption rate (do employees adopt new tools enthusiastically or reluctantly?). Write the 20-question assessment and the scoring rubric.

### #0995 — AI Principles Articulation

Write the company's AI principles. The principles should go beyond generic statements ('we use AI responsibly') to specific commitments ('we will not use AI to make autonomous hiring decisions without human review'). Principles to cover: human oversight (where humans must remain in the loop), transparency (what we disclose about AI use), fairness (how we test for and address bias), privacy (how AI interacts with personal data), safety (the conditions under which we shut down AI systems), and accountability (who is responsible when AI causes harm). Write each principle as a specific, testable commitment — not a value statement.

### #0996 — AI Program Retrospective

Write the annual AI program retrospective for the CAIO to present to the board. The retrospective should honestly assess: what AI initiatives delivered their intended ROI, what AI initiatives failed or underperformed (and why), what the organization learned about deploying AI at scale, what the competitive AI landscape looked like at year start vs. year end, what the organization's AI capability looks like now vs. year start, and what the top 3 priorities are for the coming year based on the year's learnings. This is an honest document — boards respect leaders who can assess their own program critically.

### #0997 — AI Organizational Design

Write the organizational design guide for a company building an AI-first organization. The design decisions: Should AI capability be centralized (AI team supports all business units) or decentralized (each business unit has embedded AI talent)? The answer depends on the company's AI maturity stage. Early stage: centralize (build shared capability first). Scaling stage: hybrid (central AI platform team + embedded AI product managers). Mature stage: decentralized with a center of excellence. Write the design for each stage with the org chart, the roles, and the transition plan from one model to the next.

### #0998 — AI Value Measurement Framework

Write the AI value measurement framework. AI investments are difficult to value because benefits are often diffuse and hard to attribute. The framework should: define value categories for AI investments (productivity gains, cost reduction, revenue enablement, risk mitigation, competitive positioning), for each category define the measurement methodology (productivity gains: time-tracking before and after AI implementation; revenue enablement: A/B test conversion rates with and without AI), establish the attribution standard (minimum 3-month measurement period to control for novelty effect), and create the AI ROI dashboard for the board.

### #0999 — AI in Product Review Process

Write the AI in product review process. Before any AI feature is shipped to customers, the feature must pass a review covering: accuracy (what is the false positive and false negative rate on real customer data?), explainability (can a user understand why the AI made a recommendation?), bias (has the feature been tested on diverse user groups?), privacy (what data is used, how is it protected?), security (can the feature be manipulated or adversarially attacked?), and fallback behavior (what happens when the AI is uncertain — does it say 'I don't know' or does it hallucinate confidently?). Write the review checklist and the approval process.

### #1000 — AI Talent Retention Strategy

Write the AI talent retention strategy. AI talent is among the most mobile in the workforce — top AI researchers and engineers receive 5-10 unsolicited recruiting approaches per month. The retention strategy should: understand why AI talent leaves (compensation is the stated reason, but access to data and compute, quality of AI problems, publication rights, and management quality are the real drivers), design the retention package (competitive cash and equity, plus a 'technical vision' that makes the problems worth staying for), create an AI career track that rewards technical depth rather than requiring management to advance, and offer meaningful publication rights and conference presence.

### #1001 — AI Ecosystem Strategy

Write the AI ecosystem strategy. The company's AI systems do not stand alone — they operate within a broader AI ecosystem of model providers (Anthropic, OpenAI, Google), infrastructure providers (AWS, Azure, GCP), AI tool vendors (AI code assistants, AI analytics tools, AI writing tools), and AI research institutions. The ecosystem strategy should: map the company's AI dependencies, assess the concentration risk (what happens if a key provider changes its API, raises prices, or goes out of business?), develop a multi-provider strategy for critical AI capabilities, and define the company's participation in the broader AI ecosystem (are they a consumer, a contributor to open source, or a platform other companies build on?).

### #1002 — AI Product Metrics Framework

Write the AI product metrics framework. AI products require different metrics than traditional software products. For each AI product, track: accuracy metrics (precision, recall, or task-specific quality scores), usage metrics (active users, queries per user, feature adoption), trust metrics (how often do users accept AI recommendations vs. override them?), efficiency metrics (time saved vs. without AI — measured via A/B test), and safety metrics (how often does the AI produce harmful, incorrect, or inappropriate outputs?). Write the framework with the measurement methodology, the benchmarks, and the alert thresholds for each metric type.

### #1003 — AI Learning Agenda

Write the AI learning agenda for the leadership team. The leadership team needs to stay current on AI developments that affect the company's strategy, competitive position, and operations. The learning agenda: monthly 30-minute AI briefing at the leadership team meeting (rotating presentation by the CAIO or an AI team member), quarterly half-day AI immersion (deep dive on one AI topic per quarter: Q1 — AI product strategy; Q2 — AI risk and regulation; Q3 — AI competitive landscape; Q4 — AI talent and capability), annual external AI advisory session (3-hour session with 2-3 top AI experts), and personal AI experimentation expectation (all executives should be power users of company AI tools and at least 2 external AI tools). Write the full agenda and the facilitation guide.