

Team Intelligence Platform



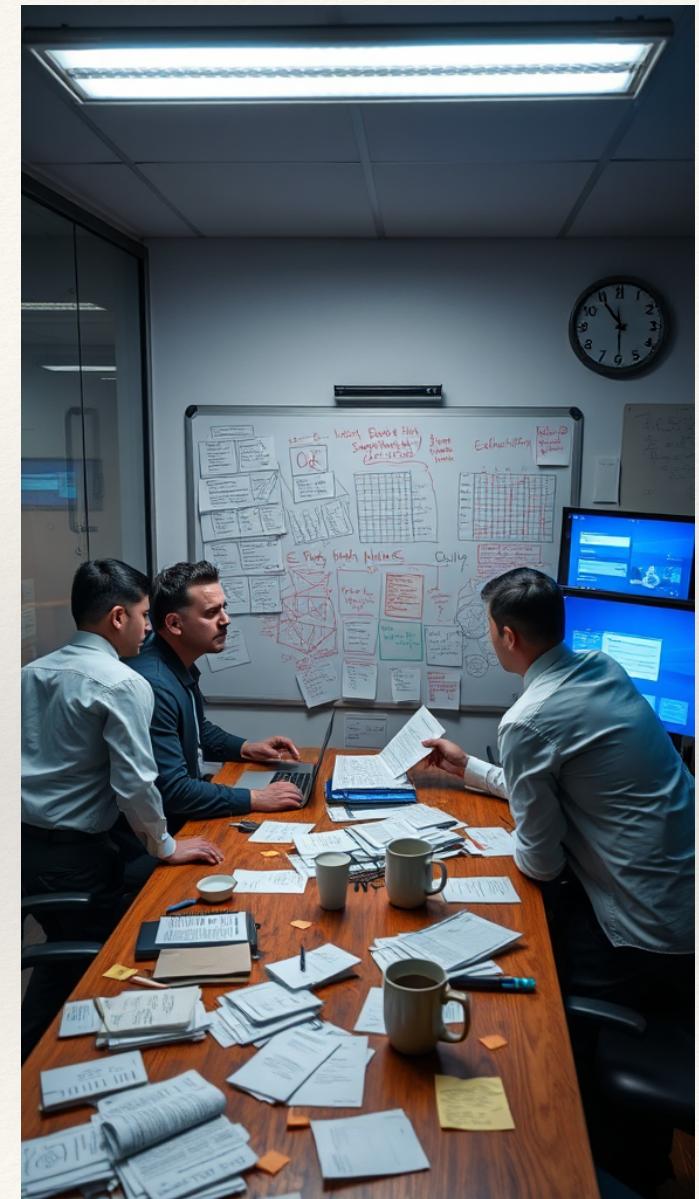
HORIZON PROTOCOL

**Introduction to AI-Co-Management
using the HORIZON Protocol
with the Team Intelligence Platform**

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The Modern Team Challenge

- ❖ Teams today juggle **information overload**: project plans, meeting notes, tasks scattered across apps.
- ❖ Critical knowledge gets **lost in inboxes or people's heads**, leading to repeated mistakes and onboarding woes.
- ❖ Members spend hours on **status reports, emails, and coordination** instead of creative or strategic work.
- ❖ Small teams feel these pains acutely – with limited time, **priorities slip and decisions delay** when the process is chaotic.



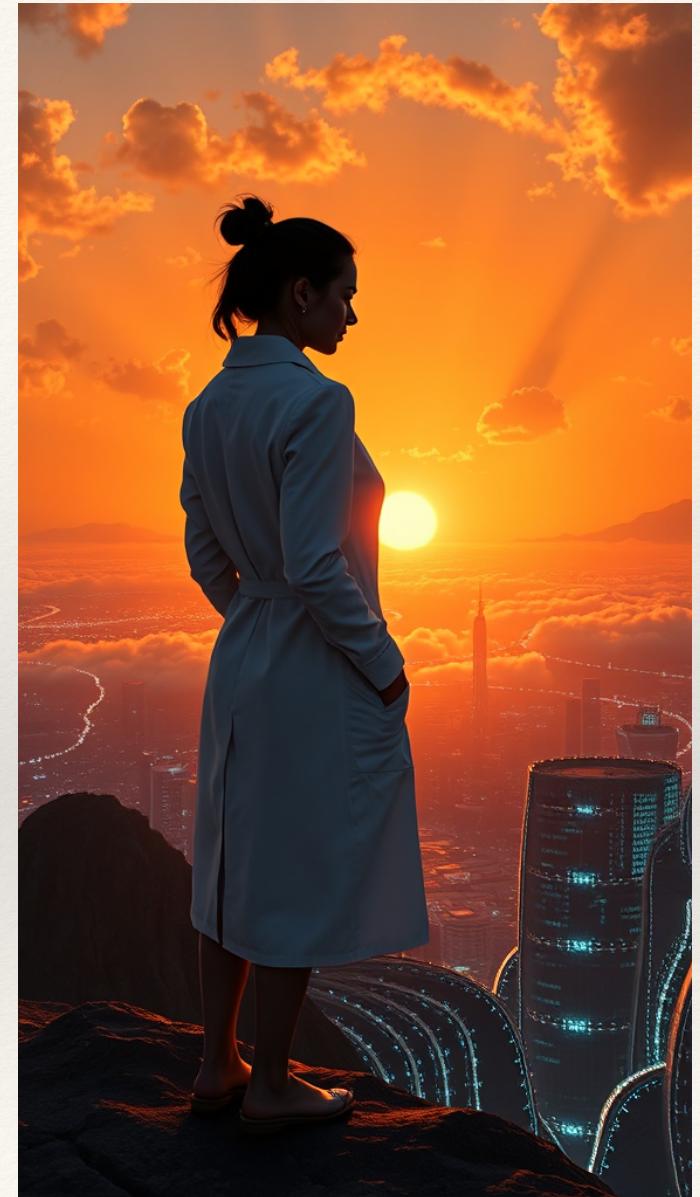
Enter AI Co-Management

- ❖ Imagine having a **24/7 intelligent assistant** on the team – not just a tool, but a team member handling routine drudgery.
- ❖ This AI tracks your team's memory: it **remembers decisions, tasks, and insights** so you don't have to.
- ❖ It helps plan each day, **summarize meetings, draft documents**, and even flags if you're off-course.
- ❖ AI Co-Management frees humans to do what they do best: innovate, connect, and make judgment calls.



Introducing the HORIZON Protocol

- ❖ **HORIZON** is a next-generation workflow that fuses AI into your daily operations seamlessly.
- ❖ Designed for teams of 1–9, it's **lightweight but powerful** – no heavy software or complex setup.
- ❖ Runs on a local LLM AI model (via Ollama), meaning **fast, private, and always available** – your data stays secure in-house.
- ❖ It's a structured process: using **templates, automated workflows, and regular rituals** to keep everything on track with minimal effort.



Key Benefits at a Glance

- ❖ **Strategic Memory:** Never lose important knowledge – team vision, notes, and decisions are captured and reused effortlessly.
- ❖ **Augmented Capacity:** The AI acts as a multiplier, **handling tasks** (summaries, first drafts, analyses) that would normally consume human hours.
- ❖ **Workflow Automation:** Routine processes (daily planning, weekly reporting, etc.) are partly or fully automated – “**build once, benefit daily.**”
- ❖ **Content Consistency:** Templates ensure every output (emails, plans, docs) follows your **brand voice and standards**, no more ad-hoc formatting.
- ❖ **Decision Support:** The AI cross-references your goals and data to provide **well-informed options and insights** for faster, better decisions.



High ROI – Only 30 Minutes a Day

- ❖ **Minimal time, Maximum output:** Each team member spends ≤ 30 min/day interacting with HORIZON, but saves much more time in return.
- ❖ Example: A daily AI-generated summary + plan (10 min review) can replace an hour of unguided morning email catch-up and coordination.
- ❖ By week's end, the team has comprehensive reports and plans with only ~ 3 hours total invested – **instead of 8–10 hours if done manually.**
- ❖ This reclaimed time can go into creative work, strategic thinking, or just ending the day on time. It's like adding a super-efficient team member who works for "free."
- ❖ **Outcome:** Less burnout, more focus on high-value tasks, and a feeling that the week is under control, not controlling you.



How HORIZON Works – Overview

- ❖ **Knowledge Base:** Central documents (vision, goals, backlog, etc.) store your team's knowledge in TIP. This is the AI's brain – it draws context from here.
- ❖ **Templates:** Pre-defined Markdown templates ensure every document (daily log, plan, review, etc.) has a consistent, easy-to-read format.
- ❖ **AI Workflows:** Automated processes use the local LLM to combine info and generate outputs (e.g., daily plan) following these templates.
- ❖ **Human-in-the-Loop:** Team members trigger workflows and lightly edit/approve outputs. AI does the heavy lifting, humans give the final OK.
- ❖ **Continuous Loop:** Each day's docs feed into weekly summaries, which feed into monthly reports... creating an ongoing loop of learning and context.



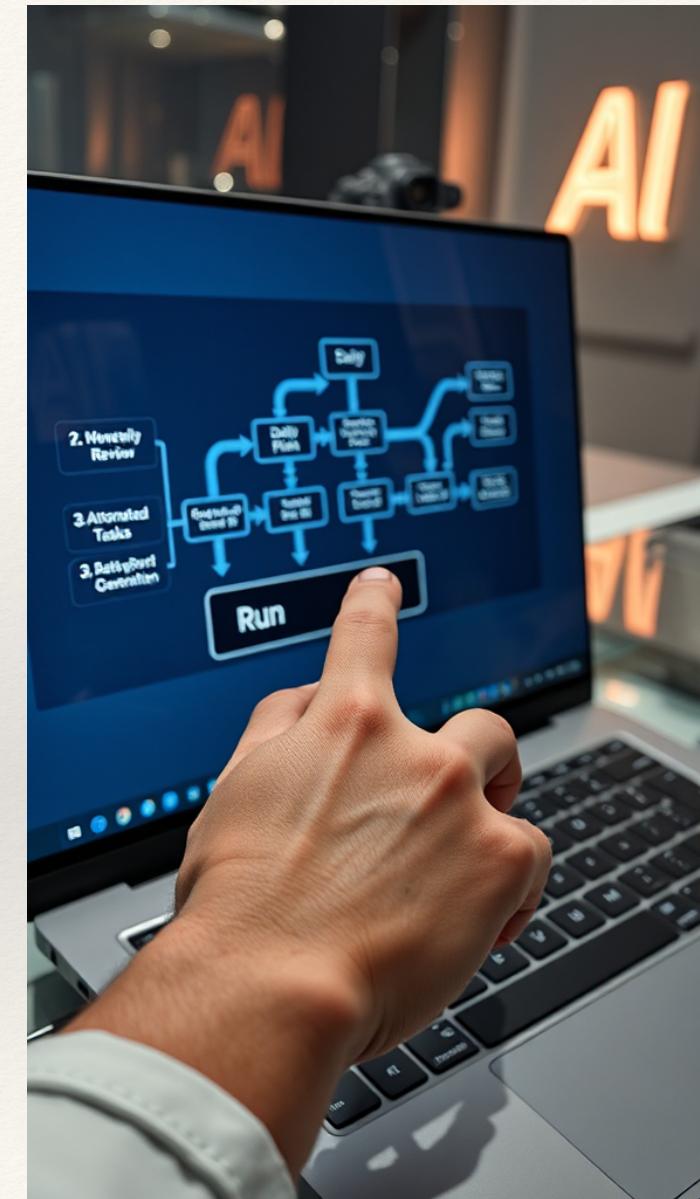
The Knowledge Base – Team Memory

- ❖ **North Star Charter:** Captures mission, vision, values, strategy pillars – the guiding light for all AI outputs to align with.
- ❖ **Quarterly OKRs:** Your goals and targets – the AI references these to prioritize tasks and measure progress.
- ❖ **Task Backlog:** A dynamic list of tasks/user stories – updated by the team, consumed by the AI for planning.
- ❖ **Logs & Records:** Daily Logs, Decision Log, Meeting Notes – a running history that the AI mines for context (so nothing is forgotten).
- ❖ **Single Source of Truth:** All in TIP, version-controlled. When someone updates a doc, the AI instantly has the latest info next run.
- ❖ **Result:** The team no longer has to remember “what was decided last month?” or “where’s the design doc?” – HORIZON surfaces it when needed.



Intelligent Workflows – Your Auto-Pilot

- ❖ **Daily Log Workflow:** Every morning, AI compiles yesterday's achievements and today's context into a brief summary – no more starting the day blind.
- ❖ **Daily Plan Workflow:** AI suggests the day's top priorities and schedule based on backlog and goals – you confirm or tweak and go execute.
- ❖ **Weekly Review Workflow:** On Friday, AI produces a recap of wins, challenges, and metrics – the team reviews lessons and heads into Monday prepared.
- ❖ **Monthly/Quarterly Reports:** AI aggregates weeks of data into strategic insights – great for management updates or planning next steps.
- ❖ **Ad-hoc workflows:** Need meeting minutes written up? A decision analyzed? The AI can do that too with appropriate templates.
- ❖ **Think of these as automated “plays” – you call the play, the AI runs it, you get the result with minimal effort.**



Team Roles – Everyone Plays a Part

- ❖ **Navigator (rotating):** The day's driver of HORIZON – kicks off workflows, feeds AI any needed info, and checks outputs. This role rotates so everyone gains skill and no one is overburdened.
- ❖ **Contributors:** All team members contribute updates – e.g., each person gives a quick status for the Daily Log or provides feedback on AI drafts. HORIZON is collaborative.
- ❖ **Metrics Steward (rotating):** Ensures key numbers (sales figures, user metrics) are up-to-date for the AI to include in reports. A small weekly duty, rotated among team analysts or leads.
- ❖ **Editor-in-Chief (rotating):** Final set of eyes for weekly/monthly outputs – polishes wording, ensures tone and quality, and helps maintain template consistency by feeding improvements back.
- ❖ **By dividing and rotating these roles, the load is light and knowledge of the system spreads across the team (no single point of failure). Plus, it's kind of fun to take turns “driving” the AI!**

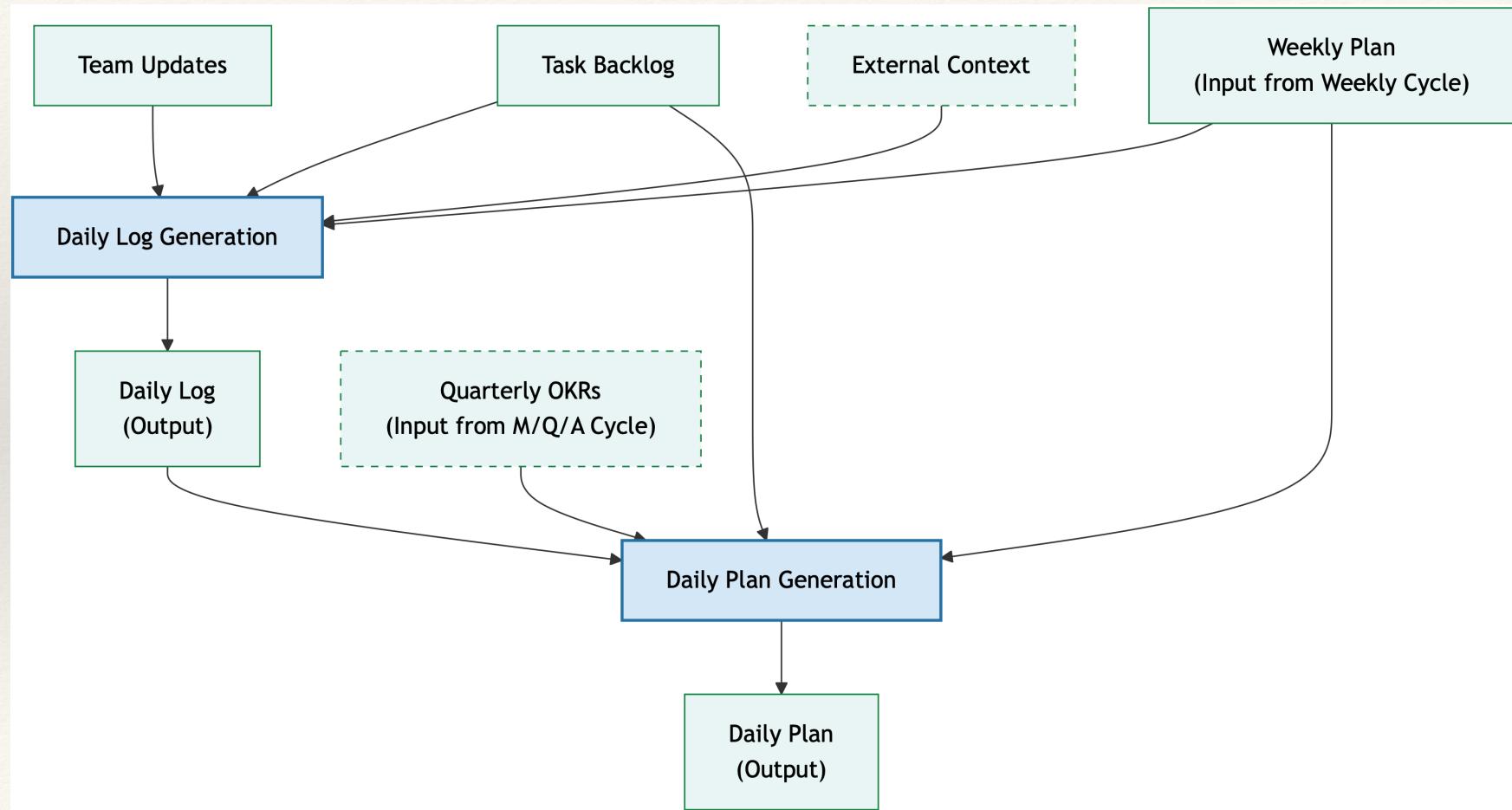


Daily & Weekly Rituals – Rhythm of Execution

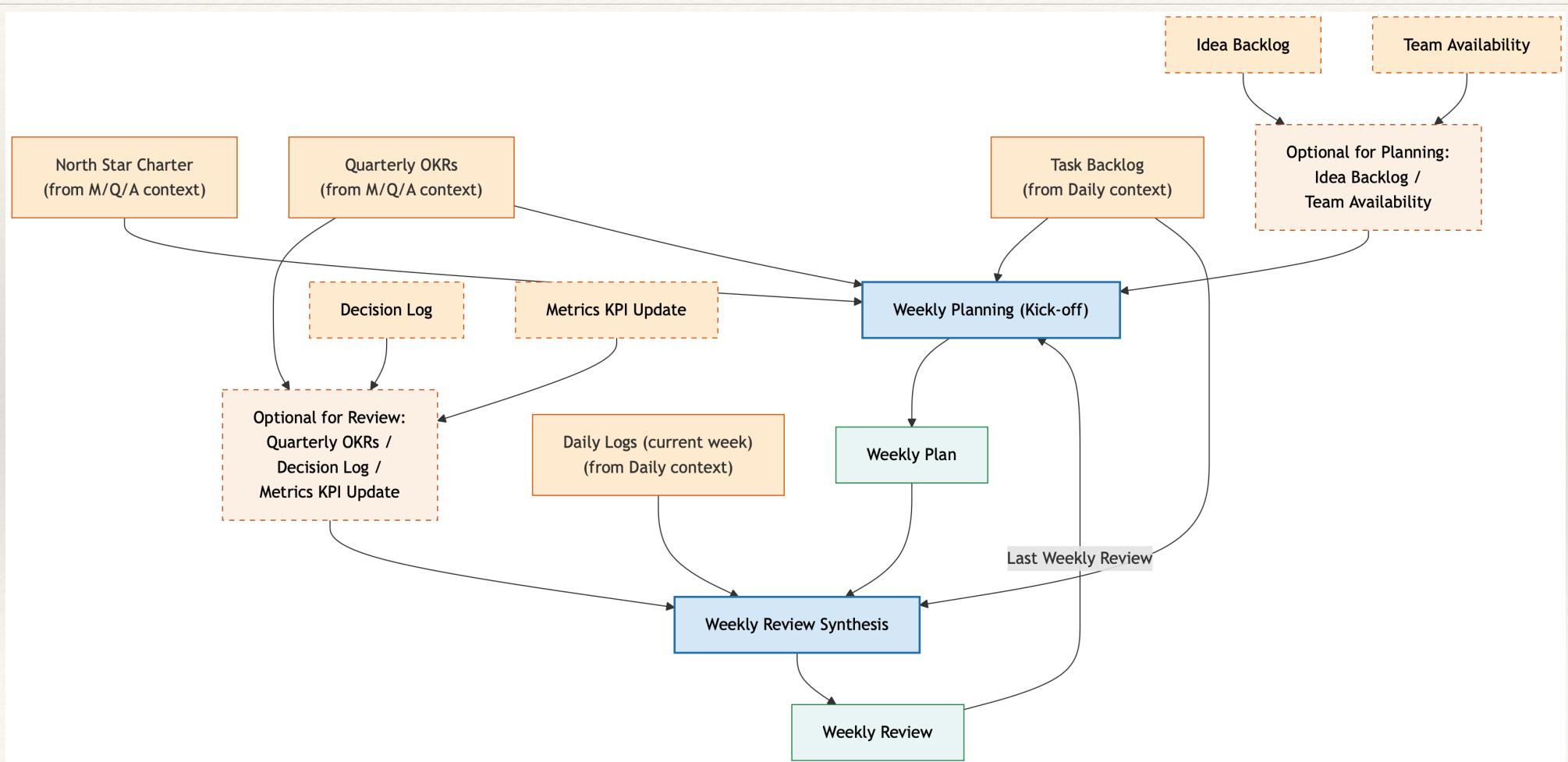
- ❖ **Morning Stand-up (daily, ~10 min):** Team shares what's done & what's next. The Navigator then has AI generate Daily Log + Plan – everyone leaves with a clear game plan by 9:30 AM.
- ❖ **Throughout the Day:** Team members update the Task Backlog as they progress. If something big happens (decision, blocker), just jot it down – it'll flow into tomorrow's log or weekly review.
- ❖ **Weekly Kick-off (Monday, ~20 min):** Review the AI-drafted Weekly Plan outlining goals/tasks for the week. Align on who's doing what. This sets focus and helps resist random mid-week detours.
- ❖ **Weekly Review (Friday, ~15 min):** Quick retrospective using AI's summary. Celebrate wins, note challenges. Team discusses any adjustments for next week while it's fresh. Then, unplug for the weekend knowing nothing is lost.
- ❖ **Consistency is key:** These checkpoints become a heartbeat that keeps the team synchronized. The AI ensures documentation is ready at each beat, the team ensures the insights are acted on.



Daily Cycle Overview



Weekly Cycle Overview

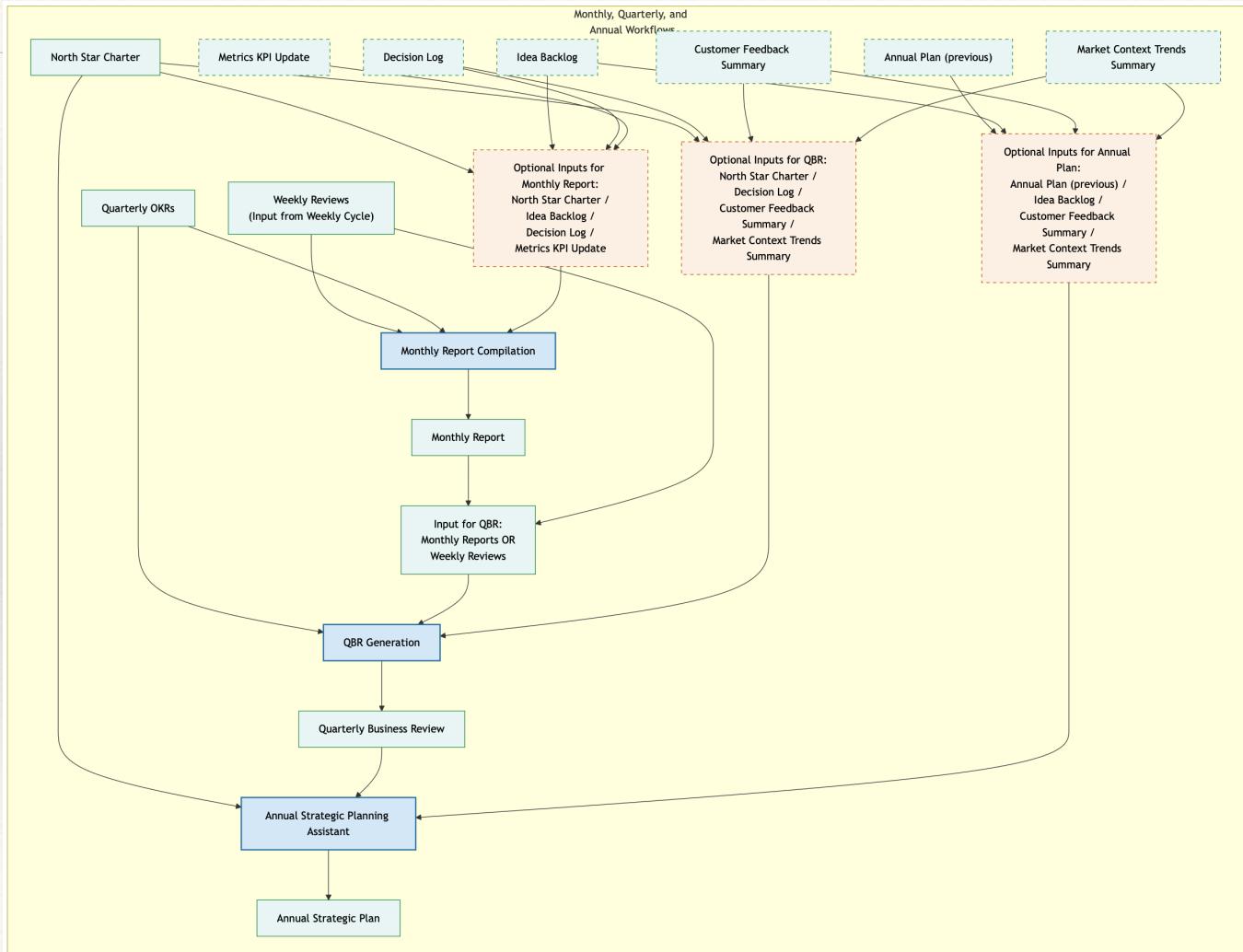


Monthly, Quarterly, Annual – Adapting & Aligning

- ❖ **Monthly Review (end of month):** The AI provides a higher-level report: how are we tracking toward quarterly goals? Any trend emerging? A short team huddle can solidify any course corrections or resource shifts for the new month.
- ❖ **Quarterly Business Review:** At quarter's end, a more comprehensive look. The AI-generated QBR doc surfaces overall performance, objective outcomes, and lessons. The team (and perhaps stakeholders) meet to strategize for the next quarter. This often feeds into updating the North Star Charter or setting the next OKRs – aligning strategy to reality.
- ❖ **Annual Planning:** Using QBRs and stored knowledge, the AI helps draft an annual strategic plan. In an annual retreat, leadership refines vision, sets big yearly objectives, and allocates budgets. HORIZON ensures all the rich context of the year is at their fingertips during this big-picture thinking.
- ❖ **Continuous Alignment:** These longer-term rituals prevent strategic drift. Because the AI keeps history, each review builds on real data and documented decisions. The team is always moving forward with context, not starting from scratch each quarter or year.



Monthly / Quarterly / Annual Cycle Overview



Getting Started – Setting Up HORIZON

- ❖ **Import Templates:** Load the provided HORIZON templates into your TIP workspace. These cover all document types you'll need.
- ❖ **Create Core Docs:** Draft your North Star Charter (mission, values, strategy) and list current quarter OKRs, backlog tasks, etc. Don't worry about perfection – even a rough draft gives the AI something to work with.
- ❖ **Configure Workflows:** In TIP's workflow manager, set up the HORIZON processes (Daily Log, Plan, Weekly, etc.) per instructions. It's mostly selecting which docs go in and which come out, using the templates.
- ❖ **Assign Roles & Schedule:** Decide who will be Navigator on Day 1, who keeps an eye on metrics, etc. Put the daily stand-up and weekly meetings on everyone's calendar with clear times.
- ❖ **Trial Run:** Do a “practice day”. For example, run the Daily Log workflow using yesterday's info to see the output, and adjust any prompt if needed (maybe you want a different tone – tweak the template). This dry run helps the team trust the system when it goes live.
- ❖ **Onboard the Team:** Walk everyone through the process (could even use these slides!). Address concerns and emphasize that it's okay to make adjustments – HORIZON will adapt with you.



Best Practices for Smooth Sailing

- ❖ **Keep Info Updated:** Treat the knowledge base as living documents. A quick update today saves the AI (and everyone) from bad info tomorrow. If you close a task or decide something, log it.
- ❖ **Review AI Outputs, then Trust Them:** Always give outputs a quick sanity check, but over time you'll find they're mostly on point. Rely on them to avoid rework – edit a bit rather than writing from scratch.
- ❖ **Be Specific with AI Instructions:** If you need something nuanced, don't hesitate to tweak a prompt or add a one-liner note for the AI (e.g., "Client X is very important, highlight their project in the report"). The local LLM is good, but clarity helps it shine.
- ❖ **Timebox and Iterate:** Set a limit (say 5 min) for editing an AI-generated doc. If it's not perfect by then, save it and move on – you can refine in the next cycle. It's better to have a "good enough" version now than a perfect version too late.
- ❖ **Continuously Improve:** Make the Prompt Workshop a regular habit (bi-weekly or monthly). Little tweaks to templates or workflows (like adding an example, or a new rule) can gradually boost quality and team satisfaction. It's like sharpening the axe.
- ❖ **Stay Open to Feedback:** Encourage team members to speak up if something feels off – maybe a workflow is too frequent or a template section isn't useful. HORIZON is flexible; you can turn knobs to suit your unique team culture.



FAQ – Making HORIZON Yours

- ❖ “**What if the AI says something wrong?**” – Built-in human oversight means you’ll catch it. Fix the output and refine the prompt if needed. Over time, these cases dwindle. The system learns from corrections.
- ❖ “**Can we modify the templates?**” – Absolutely! They’re a starting point. Add your company’s sections (e.g., a safety tip of the day), or change wording to fit your lingo. Just keep the structure clear for the AI.
- ❖ “**Do we have to use every part of HORIZON?**” – Not at all. Start with the pieces that solve your biggest pain. Maybe that’s just daily planning and weekly recaps. You can always add the rest later once you’re comfortable.
- ❖ “**Is our data safe?**” – Yes, everything runs locally in your environment. The AI isn’t calling external APIs. Plus, TIP’s versioning means you have an audit trail of changes.
- ❖ “**What if we already use Tool X?**” – HORIZON can complement existing tools. For instance, if you use JIRA for tasks, you might still use HORIZON for higher-level planning and let the AI read summaries from JIRA exports. It’s flexible – integrate where it makes sense, but many teams find they rely less on other tools as HORIZON covers their needs in one place.
- ❖ In short: **make it work for you.** HORIZON is a framework, not a rigid mandate. Experiment and tailor it to amplify your team’s strengths and workflows.



Achieve More – Your Team at its Best

- ❖ With HORIZON Protocol, your small team can **punch above its weight** – working smarter, not harder.
- ❖ No more scrambling for status updates or forgetting important follow-ups: the AI co-manager has it covered.
- ❖ Expect to see **clearer communication, faster decisions, and a calmer, more controlled workflow** day-to-day.
- ❖ The ultimate goal: **free your humans to be human** – creative, strategic, empathetic – while the AI takes care of the grind and the memory.
- ❖ As you adopt HORIZON, you're not just implementing a tool, you're embracing a culture of continuous improvement and collaboration with AI.
- ❖ **Welcome to the future of teamwork** – where your team's potential extends far beyond the horizon.



Supplemental Workflows Overview

