

LEAN AI CO-MANAGEMENT



**Introduction to
Lean AI-Co-Management
with the Team Intelligence Platform**

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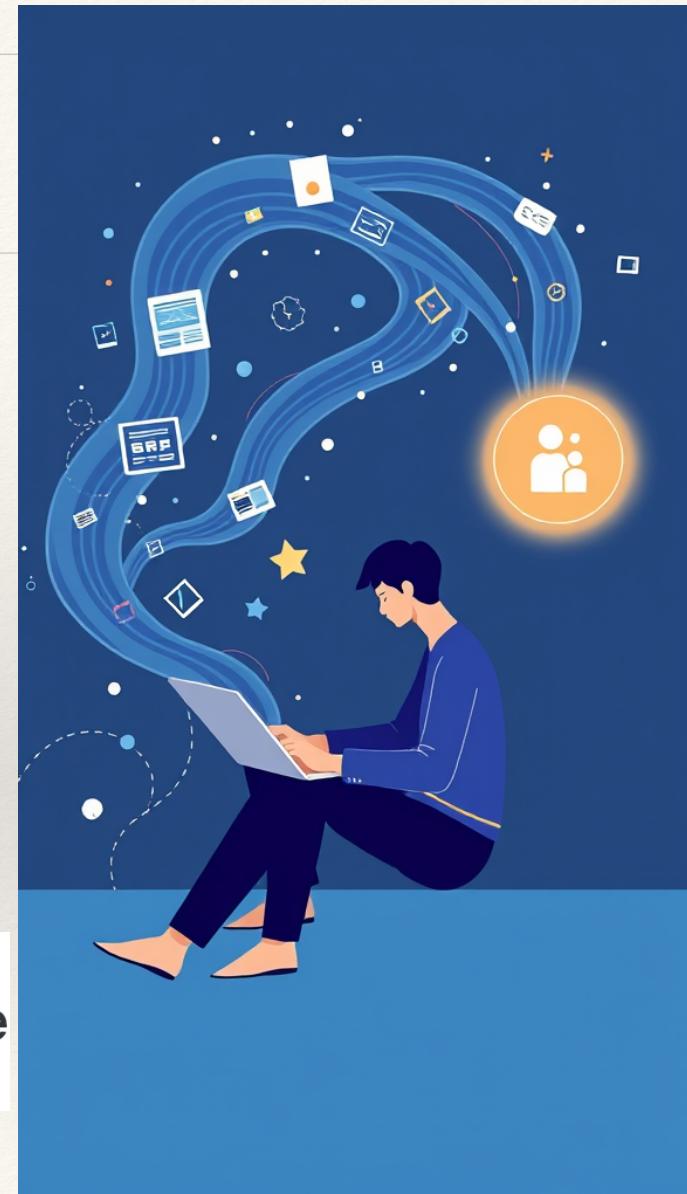
Introduction

Stop Drowning in Data, Start Collaborating with AI: Introducing Lean AI Co-Management (LACM) with the Team Intelligence Platform (TIP).

- ❖ Unlock the practical power of AI in your daily work.
- ❖ Turn information chaos into structured knowledge.
- ❖ Make AI your efficient, reliable, helpful colleague using the TIP.



Team
Intelligence
Platform



The Modern Work Challenge

- ❗ Information Overload & Untapped AI Potential
 - ❖ Struggling to keep up with news, emails, reports?
 - ❖ Is valuable knowledge lost in chat logs and scattered notes?
 - ❖ Using AI tools ad-hoc, but lacking a systematic approach?
 - ❖ Wish AI could **proactively** help manage your workflow?



Introducing LACM with TIP

What is Lean AI Co-Management (LACM) in TIP?

- ❖ LACM is a **Process Framework** implemented using the **Team Intelligence Platform (TIP)** software.
- ❖ It integrates AI (running locally in TIP for privacy) into your daily routines.
- ❖ Builds a **structured, version-controlled knowledge base** within TIP (using simple Markdown files).
- ❖ Focuses on **rapid value**, efficiency, and user control.
- ❖ Think of it as giving your team an AI-powered Chief of Staff within TIP.



Core Principles of LACM in TIP

How LACM in TIP Works: The Foundations

- ❖ **Collective Context:** AI works from your shared knowledge base in TIP (your notes!).
- ❖ **Explicit AI Roles:** AI performs defined tasks (Analyze, Summarize, Plan Draft) via TIP Workflows.
- ❖ **Integrated Routines:** AI steps are built into daily/weekly cycles within TIP.
- ❖ **Human Evaluation:** YOU review and approve AI outputs in TIP – you're in control.
- ❖ **Continuous Learning:** The system and your use of it improve over time.
- ❖ **Markdown Standard:** Simple text files (`.md`) are the backbone of TIP documents.



The LACM Process in TIP: Daily Cycle ☀️

Your Day, Supercharged: The Daily Cycle in TIP

- ❖ **AI News Analysis:** Start your day with relevant news, analyzed for your context. (AI Role: Analyst 🕵️)
- ❖ **AI Context Capture:** Quickly log yesterday's progress & issues; AI structures it. (AI Role: Documenter 📝)
- ❖ **AI Daily Planning:** Get a draft plan for today, aligned with weekly goals & capacity. (AI Role: Planning Assistant 📅)
- ❖ **You:** Review, refine, approve AI outputs within the TIP interface.
- ❖ **Result:** Focused execution, captured knowledge, less morning scramble. (Benefit: ⏳ Focus)

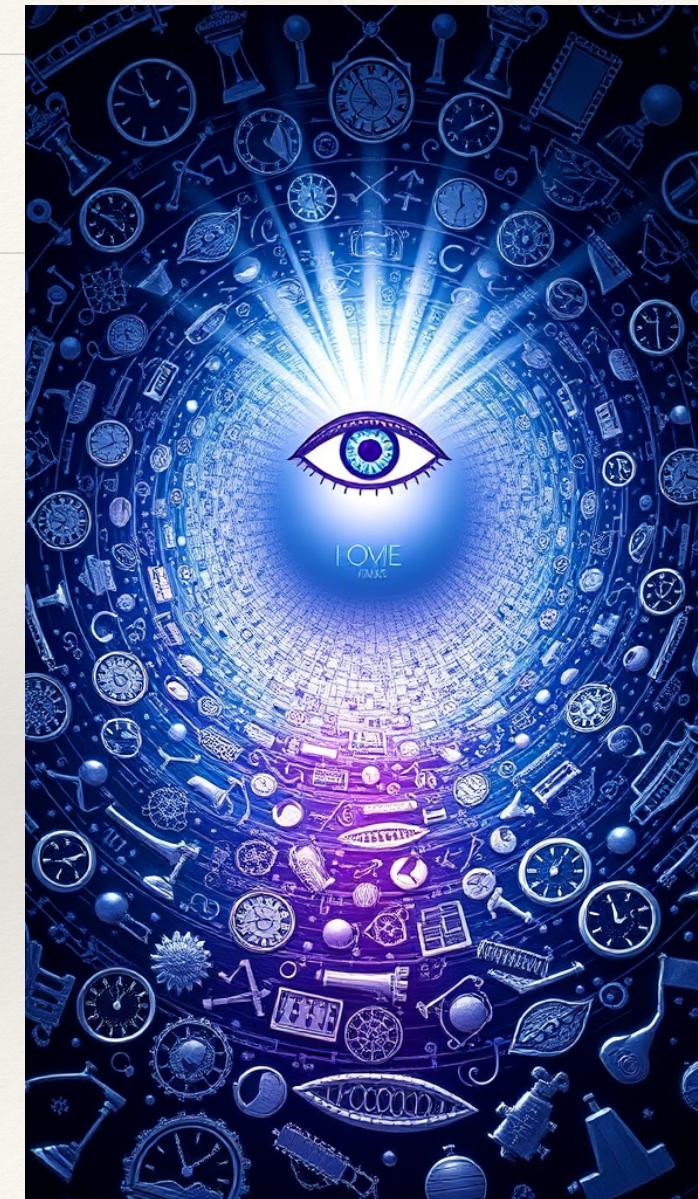


The LACM Process in TIP: Weekly Cycle



Zooming Out: The Weekly Cycle in TIP

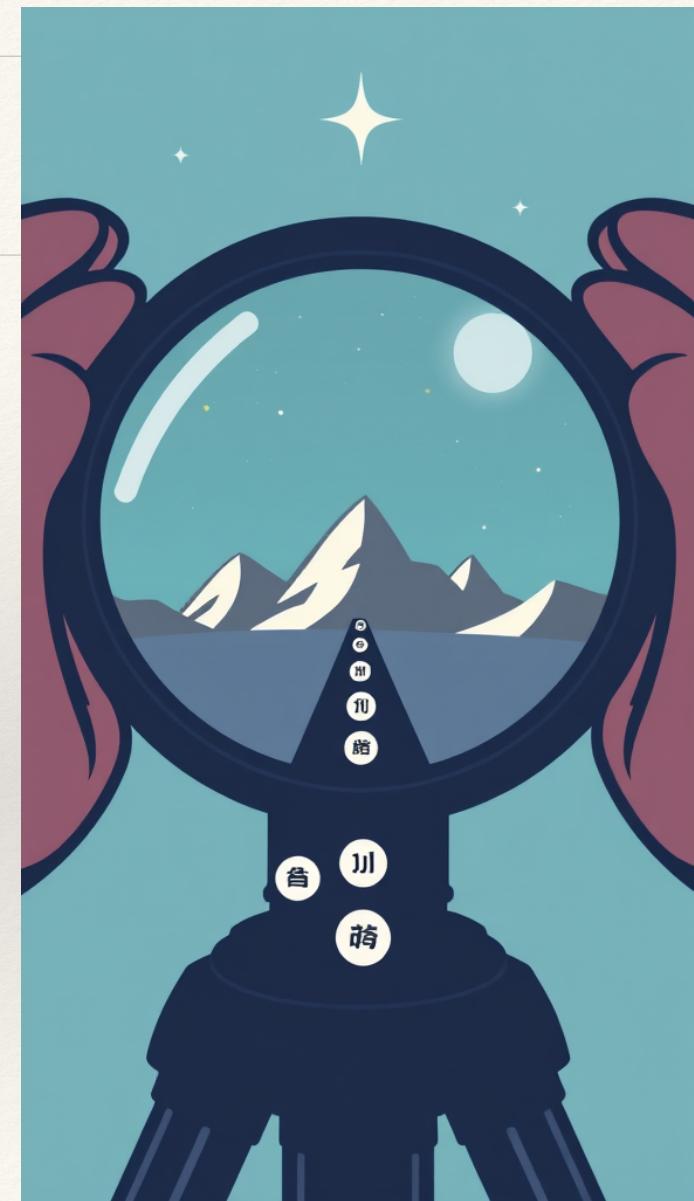
- ❖ **AI Weekly Analysis:** AI summarizes the week's external trends. (AI Role: Synthesizer 🧩)
- ❖ **Team Retro (AI Assist):** AI analyzes daily logs for patterns to inform your weekly review (What went well? What needs improvement?).
- ❖ **AI Weekly Planning:** Get a draft focus plan for **next** week, based on goals & learnings.
- ❖ **You:** Reflect, discuss, improve processes, set weekly priorities.
- ❖ **Result:** Continuous improvement, tactical adjustments, clear weekly focus. (Benefit: 🌱 Clarity)



The LACM Process in TIP: Monthly & Beyond 🚀

Strategic Alignment: Monthly & Longer Cycles in TIP

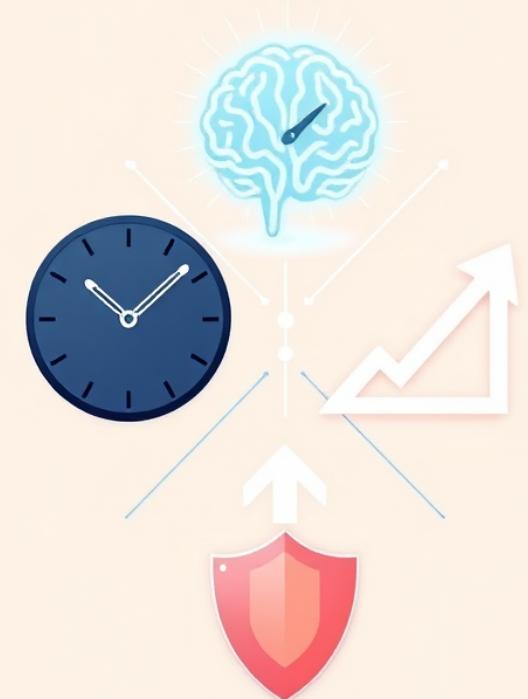
- ❖ **Monthly:** AI summarizes weekly trends, checks alignment with strategy & goals. Helps manage knowledge base size. (AI Roles: Strategy Analyst 📊, Archivar 📁)
- ❖ **Quarterly:** Deep dive review, goal setting (OKRs). AI analyzes performance and drafts next quarter's goals. Innovation management.
- ❖ **Annually:** Foundational strategy review and update.
- ❖ **You:** Make key strategic decisions informed by AI analysis within TIP.
- ❖ **Result:** Strategy stays relevant, long-term goals are tracked, knowledge base remains efficient. (Benefit: 💡 Efficiency)



Why Use LACM with TIP? The Benefits 🏆

Tangible Benefits, Starting Now

- ❖ ⏰ **Save Time:** Automate analysis, summarization, reporting, and planning drafts.
- ❖ 🧠 **Preserve Knowledge:** Stop losing insights; build a searchable, permanent brain in TIP.
- ❖ 📈 **Improve Decisions:** Act on AI-surfaced trends, risks, and opportunities daily & weekly.
- ❖ 🎯 **Increase Focus:** Start each day/week with clear, aligned priorities.
- ❖ 💡 **Boost Efficiency:** Streamline workflows and improve processes based on data.
- ❖ 🔒 **Data Privacy:** Uses local AI by default within TIP – your data stays with you.
- ❖ 💰 **Affordable & Lean:** Leverages open-source tools, minimal overhead.



Realizing the Full Potential ✨

From Assistant to True Co-Manager: The LACM Potential with TIP

- ❖ Imagine an AI in TIP that deeply understands your context, history, and goals.
- ❖ Proactively surfaces connections and insights you might miss.
- ❖ Helps anticipate challenges and opportunities sooner.
- ❖ Turns your accumulated knowledge in TIP into a strategic advantage.
- ❖ Frees you up for higher-level thinking and action.
- ❖ **This isn't sci-fi – it's the result of consistent LACM practice in TIP.**



What "Done Right" Means ✓

Unlocking Potential: How to Do LACM in TIP Right

- ❖ **Consistency:** Run the cycles regularly – especially daily & weekly. Habit is power.
- ❖ **Honest Input & Review:** Provide good input, **critically** review AI output. Garbage In, Garbage Out applies! You are the quality control.
- ❖ **Curate Your Knowledge:** Actively build and link your Markdown notes in TIP. The richer the context, the better the AI performs.
- ❖ **Embrace Iteration:** Don't expect perfection on day one. Refine documents, processes, (and TIP Workflow prompts via Admin) as you go. Continuous learning is key.
- ❖ **Commit Changes:** Use TIP's "Save" functionality – this creates new versions of your documents and builds the history.



Your Return on Investment



Why Invest ~30 Mins a Day in LACM with TIP? The ROI.

- ❖ **Time Saved > Time Spent:** Automating routine tasks frees up hours per week.
- ❖ **Cost of Lost Knowledge Avoided:** What's the value of **not** forgetting key decisions or insights?
- ❖ **Value of Better Decisions:** Faster identification of trends/risks leads to better outcomes.
- ❖ **Reduced Friction & Stress:** Less searching, more finding. Less reacting, more proactive planning.
- ❖ **Future-Proofing:** Builds skills & systems for effective AI collaboration.
- ❖ **LACM with TIP isn't just another tool – it's a system for thinking and operating more effectively with AI as your partner.**



Call to Action



Ready to Make AI Your Co-Manager with TIP?

- ❖ Start today by setting up your initial documents in TIP (see next slide!).
- ❖ Commit to the daily and weekly cycles.
- ❖ Experience the power of structured AI collaboration.
- ❖ **Take control of your information, empower your decisions.**
- ❖ **Let's begin your LACM journey in TIP!**

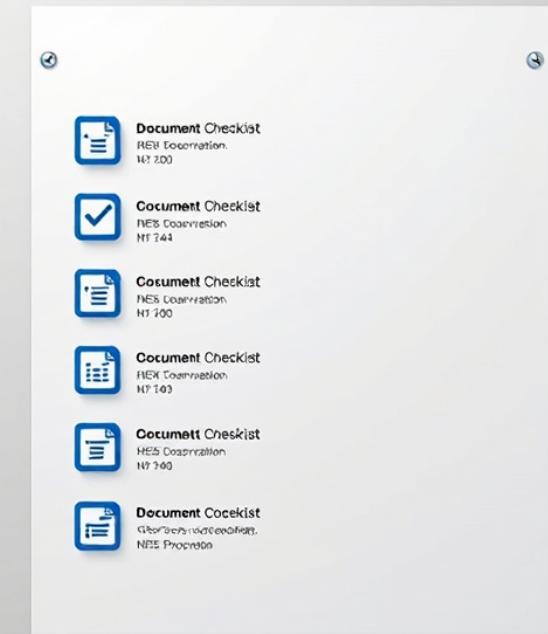


Initial Setup: Your Foundation in TIP



Setting Up For Success: Initial Documents in TIP

- ❖ Before starting, create these foundational documents in TIP using the available Admin-created Templates:
 - ❖ `Strategy_Current` (using `LACM Strategy` Template)
 - ❖ `Competitors_Current` (using `LACM Competitors` Template)
 - ❖ `TargetMarkets_Current` (using `LACM TargetMarkets` Template)
 - ❖ `Goals_Q[CurrentQuarter]_[CurrentYear]` (using `LACM QuarterlyGoals` Template)
 - ❖ `KW[CurrentWeek]_WeeklyPlanPreview_InitialSetup` (using `LACM WeeklyPlanPreview_Initial` Template)
 - ❖ `TaskList_Current` (using `LACM TaskList` Template)
 - ❖ `AvailableTime_Current` (using `LACM AvailableTime` Template)
 - ❖ `Processes_Internal` (using `LACM Processes` Template)
- ❖ These documents provide the essential context for your team and TIP's AI Workflows.



Daily Ritual ☀️: News & Environment Analysis

Daily Pulse: AI-Assisted News & Environment Analysis

- ❖ **Your Action:** Manually research and log news/updates into `ManualNewsInput_YYYY-MM-DD` (using `LACM ManualNewsInput` Template).
- ❖ **TIP Workflow:** Run `LACM DailyNewsAnalysis`.
- ❖ **Input Docs:** Your `ManualNewsInput_YYYY-MM-DD`, `Strategy_Current`, `Competitors_Current`, `TargetMarkets_Current`.
- ❖ **AI Action:** Analyzes inputs against your strategic context.
- ❖ **Output Doc:** `DailyNewsAnalysis_YYYY-MM-DD_...` (AI-generated, reviewed by you).
- ❖ **Value:** Early awareness of opportunities/threats; external context for daily decisions. (Benefit: 💡 Decisions)



Daily Ritual ☀️: Review & Context Capture

Daily Download: AI-Assisted Review & Context Capture

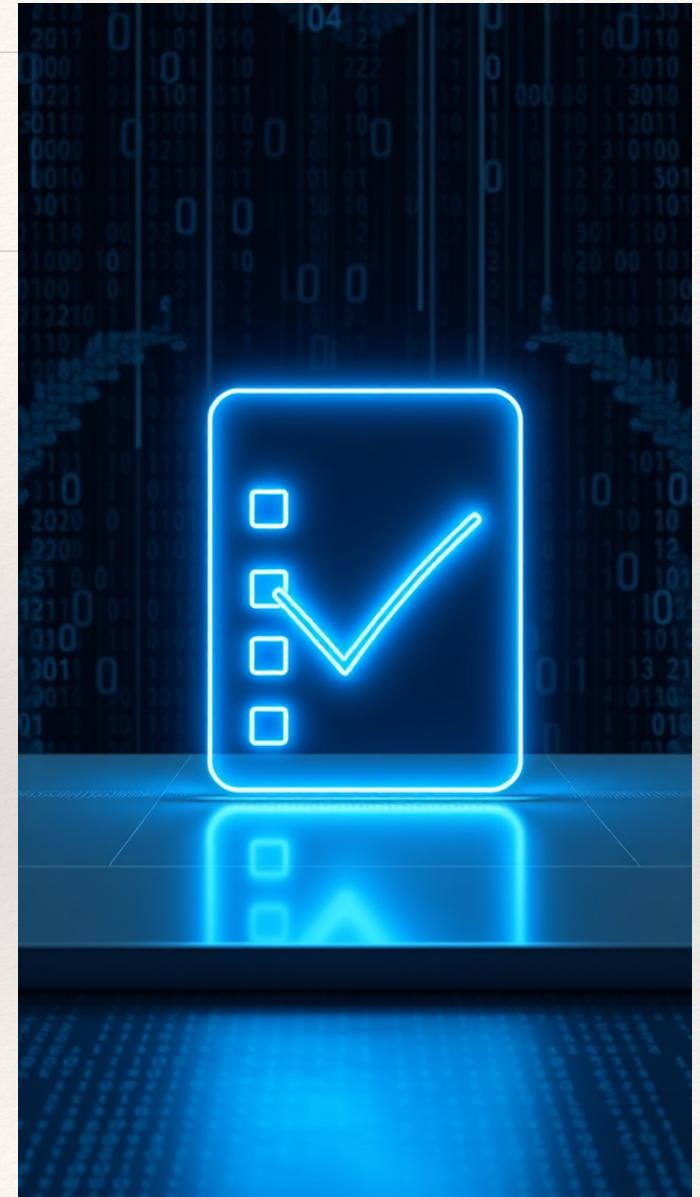
- ❖ **Your Action:** Team reflects and logs progress/issues into `DailyLogInput_{...}_YYYY-MM-DD` (using `LACM DailyLogInput` Template).
- ❖ **TIP Workflow:** Run `LACM DailyLogGenerator`.
- ❖ **Input Docs:** Your `DailyLogInput_{...}_YYYY-MM-DD`, previous day's `DailyPlan_YYYY-MM-DD-1`, today's `DailyNewsAnalysis_YYYY-MM-DD_{...}`.
- ❖ **AI Action:** Structures inputs into a draft daily log.
- ❖ **Output Doc:** `DailyLog_YYYY-MM-DD_{...}` (AI-drafted, reviewed and saved by you).
- ❖ **Value:** Captures vital operational context, records progress/issues, documents learnings. (Benefit: 🧠 Knowledge)



Daily Ritual ☀️: Daily Planning

Daily Roadmap: AI-Powered Daily Planning

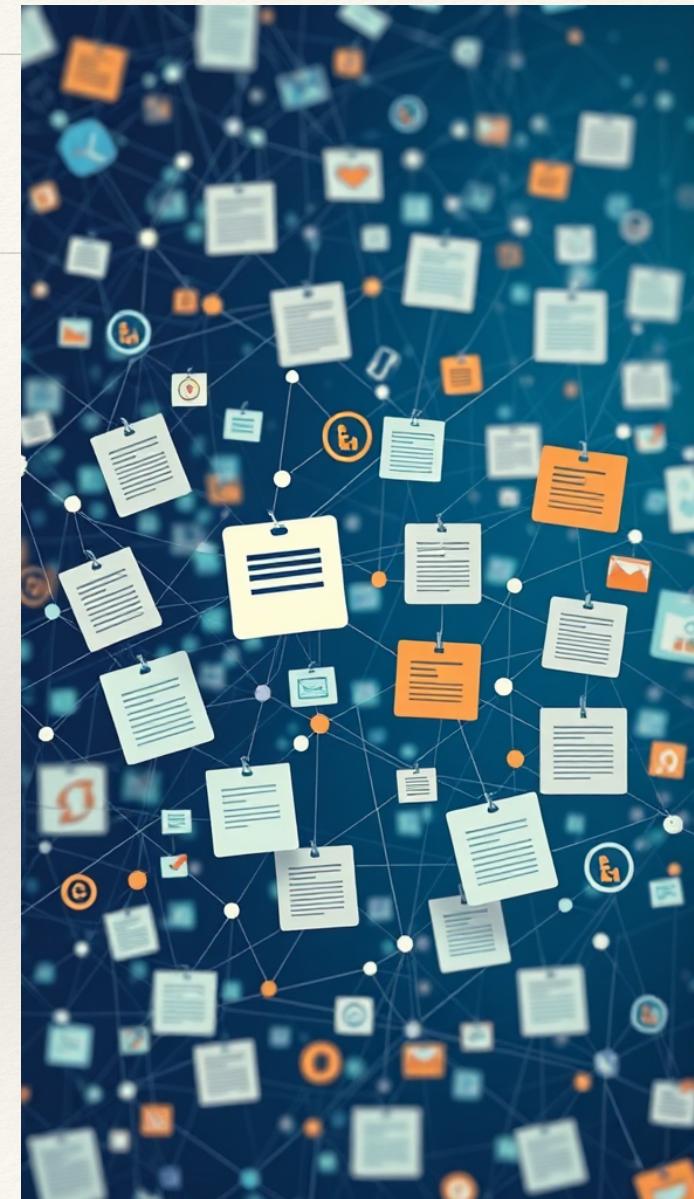
- ❖ **Your Action:** Ensure `AvailableTime_Current` (from `LACM AvailableTime` Template) & `TaskList_Current` (from `LACM TaskList` Template) are updated.
- ❖ **TIP Workflow:** Run `LACM DailyPlanGenerator`.
- ❖ **Input Docs:** Daily context (today's `DailyLog_...` & `DailyNewsAnalysis_...`), strategic guides (`Strategy_Current`, `Goals_Quarter_...`, `KW[CurrentWeek]_WeeklyPlanPreview_...`), resource docs (`TaskList_Current`, `AvailableTime_Current`).
- ❖ **AI Action:** Analyzes inputs, prioritizes tasks, and drafts a daily plan.
- ❖ **Output Doc:** `DailyPlan_YYYY-MM-DD_...` (AI-drafted, reviewed and saved by you).
- ❖ **Value:** Clear, prioritized, achievable plan for the day, aligned with larger goals. (Benefit: 🎯 Focus)



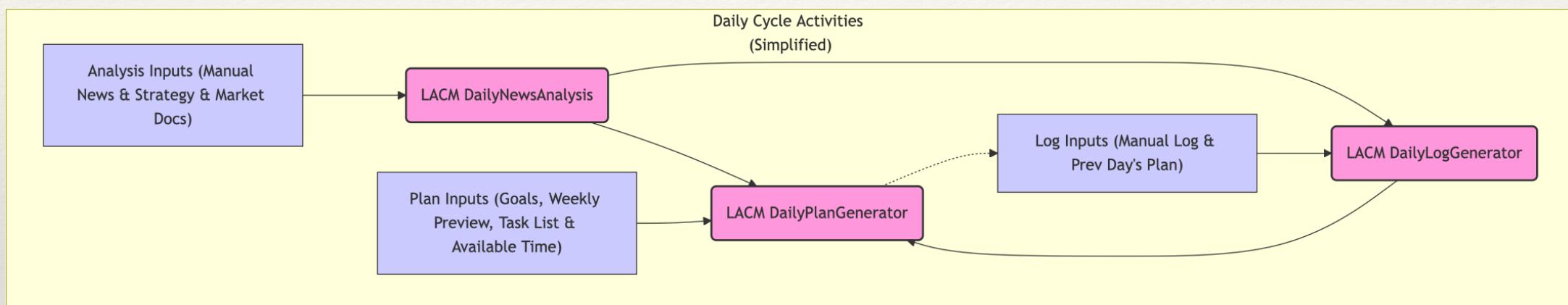
Daily Practice 🤝: Continuous Documentation

Living Knowledge: Continuous Documentation in TIP

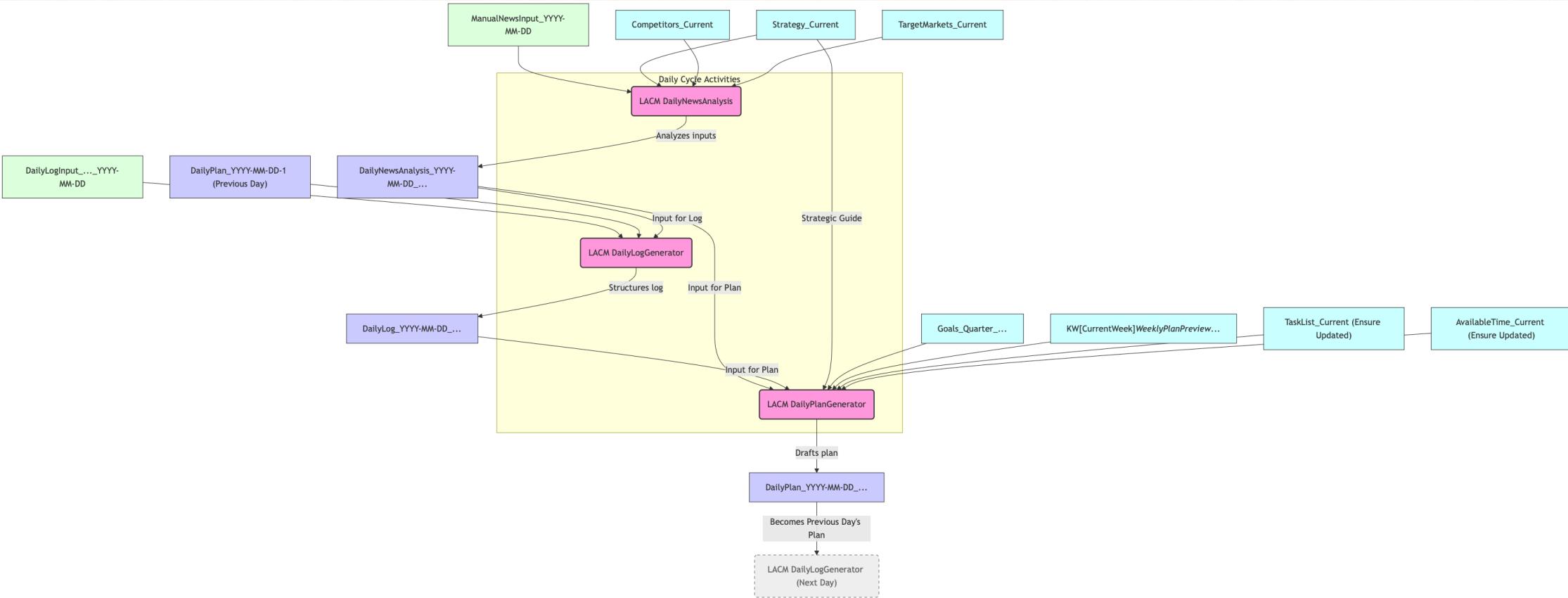
- ❖ **Your Action (Manual):** Capture notes, decisions, outcomes in new/existing TIP Documents (e.g., `MeetingSummary_...` using `LACM MeetingSummary` Template, `DecisionLog_...` using `LACM DecisionLog` Template). Use consistent naming.
- ❖ **Your Action (AI Assist Ad-hoc):** For specific tasks (drafting, brainstorming, analysis), prepare a `PairInput_[TaskDescription]_[Date]` document (user-created, can use `A blank Template` or structure as needed).
- ❖ **TIP Workflow:** Select a general-purpose workflow (e.g., `LACM DraftSection`, `LACM BrainstormIdeas`, `LACM AnalyzeTextSegment`).
- ❖ **AI Action:** Processes your `PairInput_...` document.
- ❖ **Output Doc:** Various updated/new TIP Documents, including AI-assisted drafts (e.g., `DraftOutput_...`) reviewed and integrated by you.
- ❖ **Value:** Builds "Collective Context," makes info searchable/reusable, preserves knowledge. (Benefit: 📚 Knowledge Base)



Daily Cycle Overview (Simplified)



Daily Cycle Overview (Detailed)



Weekly Ritual 📅: Analysis Summary & Trend ID

Weekly Lens: AI-Synthesized Analysis & Trends

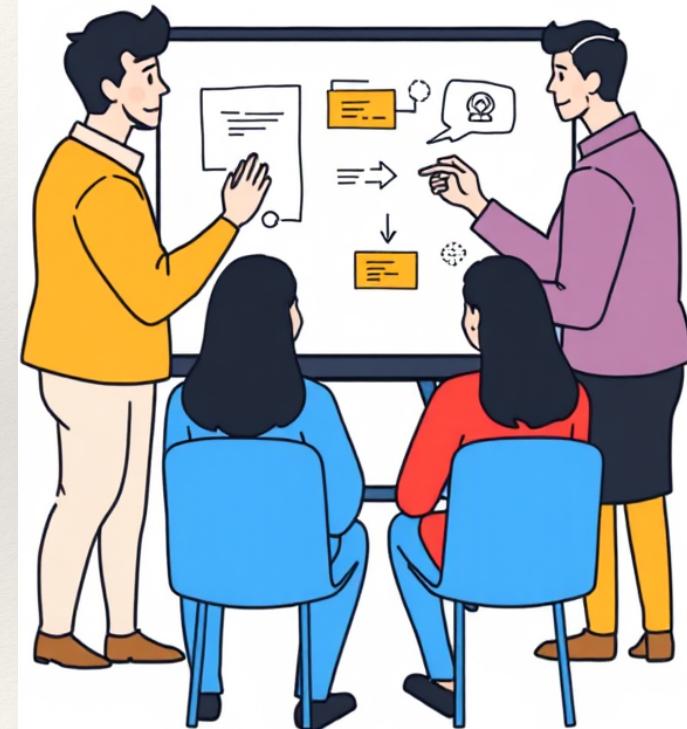
- ❖  **TIP Workflow:** Run `LACM WeeklyAnalysis`.
- ❖ **Input Docs:** `DailyNewsAnalysis_YYYY-MM-DD_...` (from past 7 days), `Strategy_Current` (from `LACM Strategy` Template).
- ❖  **AI Action:** Processes daily analyses and strategy, identifies trends.
- ❖  **Output Doc:** `KW[CurrentWeek]_WeeklyAnalysis_YYYY-MM-DD` (AI-generated, reviewed and saved by you).
- ❖  **Value:** Higher-level view of the external environment, informs weekly planning. (Benefit:  Insights)



Weekly Ritual 📅: Review & Retrospective

Weekly Learnings: AI-Prepped Team Retrospective

- ❖ 💡 **TIP Workflow (Prep):** Run `LACM WeeklyRetroPrep`.
- ❖ **Input Docs (AI Prep):** `DailyLog_YYYY-MM-DD_...` (past 7 days),
`KW[CurrentWeek-1]_WeeklyPlanPreview_...`, optional: `Processes_Internal` (from
`LACM Processes` Template).
- ❖ 🤖 **AI Action:** Generates `KW[CurrentWeek]_RetroPreparation_...` with data points.
- ❖ 👤 **Your Action (Team):** Review AI prep, conduct retro discussion. Create/Update:
 - ❖ `KW[CurrentWeek]_WeeklyRetroSummary_YYYY-MM-DD` (using `LACM WeeklyRetroSummary` Template)
 - ❖ `Processes_Internal` (using `LACM Processes` Template)
 - ❖ `TaskList_Current` (using `LACM TaskList` Template)
- ❖ ⭐ **Value:** Drives continuous improvement, addresses recurring issues. (Benefit: 🌱 Growth)



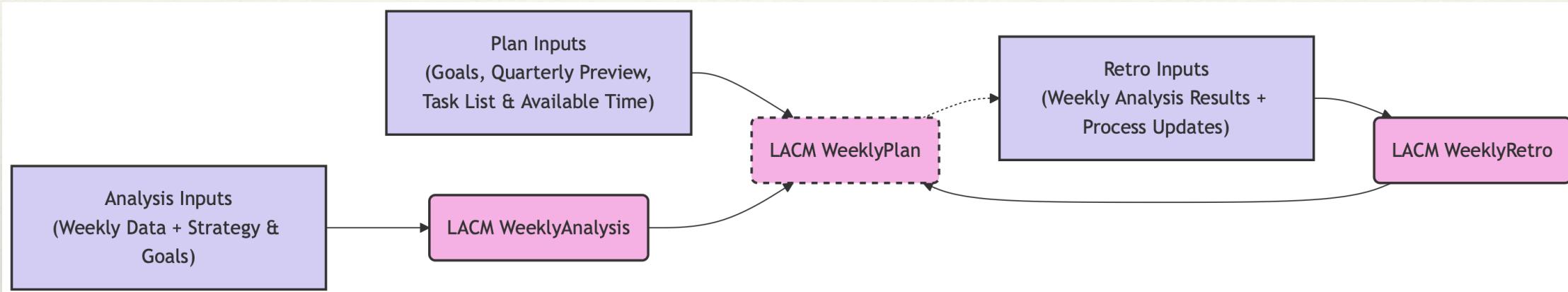
Weekly Ritual 📅: Weekly Planning (Preview)

Next Week Now: AI-Drafted Weekly Plan Preview

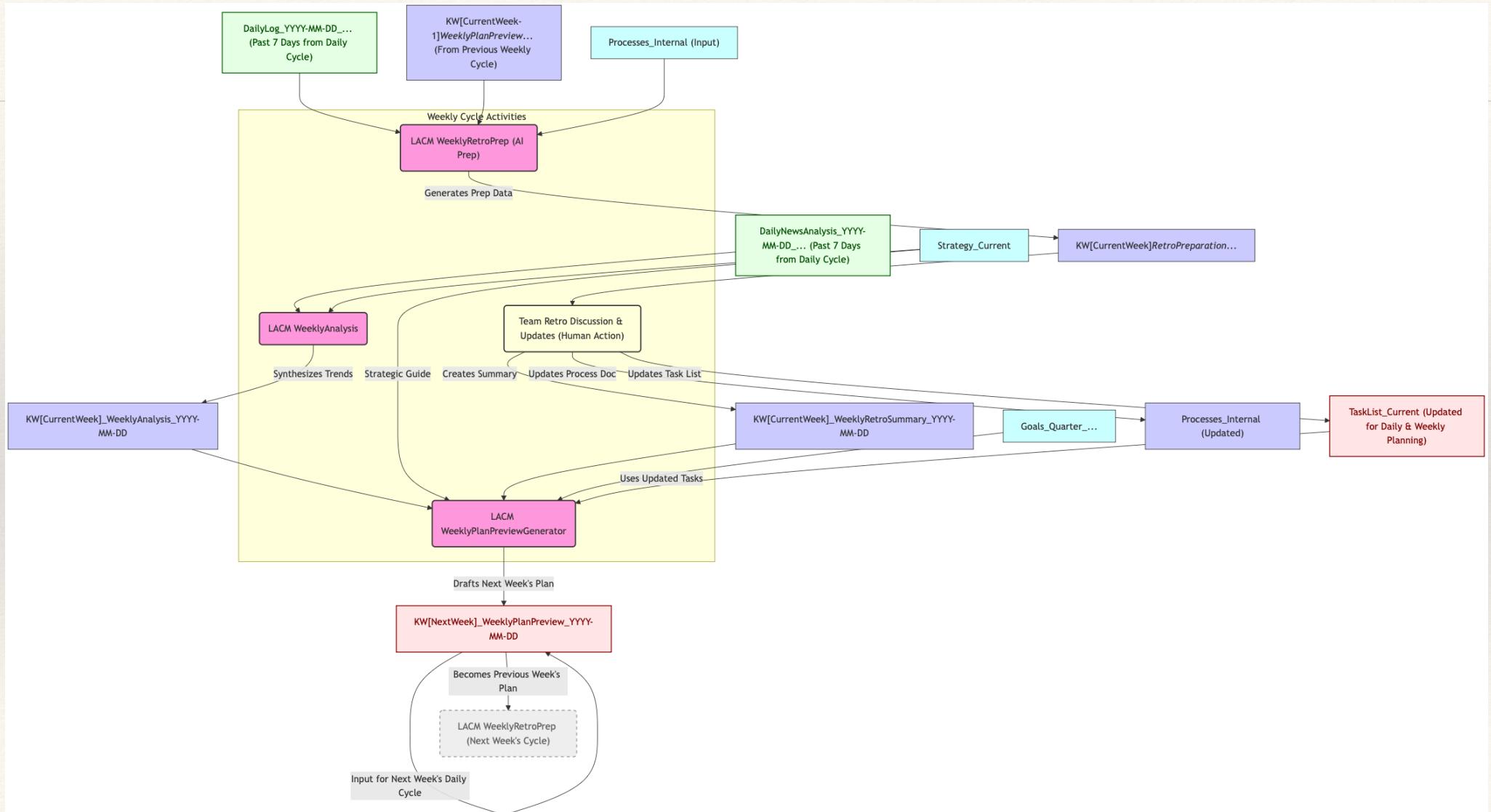
- ❖ 🚀 **TIP Workflow:** Run `LACM WeeklyPlanPreviewGenerator`.
- ❖ **Input Docs:** Current week's `KW[CurrentWeek]_WeeklyAnalysis_...` & `KW[CurrentWeek]_WeeklyRetroSummary_...` (human-created from `LACM WeeklyRetroSummary` Template), `Strategy_Current` (from `LACM Strategy` Template), `Goals_Quality_...` (from `LACM QuarterlyGoals` Template), `TaskList_Current` (from `LACM TaskList` Template).
- ❖ 🤖 **AI Action:** Analyzes inputs, proposes objectives for next week.
- ❖ 📄 **Output Doc:** `KW[NextWeek]_WeeklyPlanPreview_YYYY-MM-DD` (AI-drafted, reviewed and saved by you).
- ❖ ⭐ **Value:** Sets clear priorities for the upcoming week. (Benefit: 🔍 Direction)



Weekly Cycle Overview (Simplified)



Weekly Cycle Overview (Detailed)



Monthly Ritual ●: Analysis & Strategy Check

Monthly Compass: AI-Assisted Strategy Alignment

- ❖  **TIP Workflow:** Run `LACM MonthlyAnalysisStrategyCheck`.
- ❖ **Input Docs:** `KW*_WeeklyAnalysis_*` (for the month),
`Strategy_Current` (from `LACM Strategy` Template),
`Goals_Quarter_Current` (from `LACM QuarterlyGoals` Template).
- ❖  **AI Action:** Synthesizes weekly trends, evaluates progress
against strategy/goals.
- ❖  **Output Doc:** `YYYY-MM_MonthlyAnalysisStrategyCheck` (AI-generated, reviewed and saved by you).
- ❖  **Value:** Consolidated strategic view, data-informed reviews.
(Benefit:  Strategic Clarity)



Monthly Ritual 🌳: Context Size Management

Knowledge Pruning: AI-Aided Context Condensation

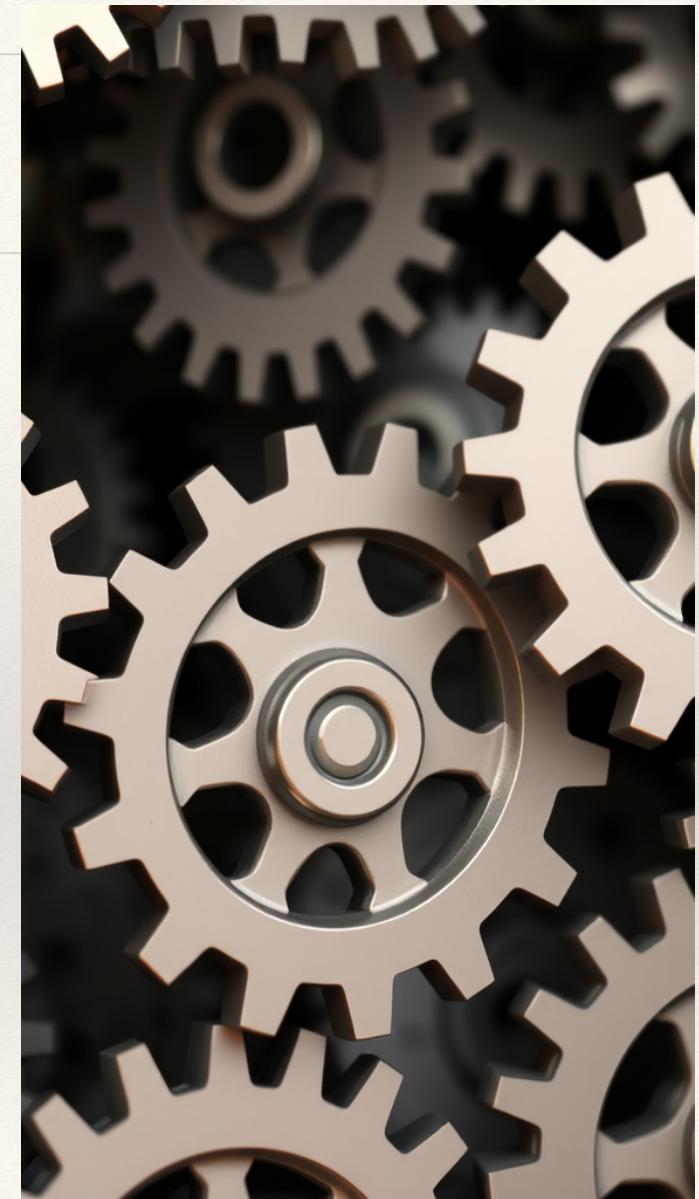
- ❖ 🛡️ **TIP Workflow:** Run `LACM ContextCondensation`.
- ❖ **Input Docs:** Older TIP documents (e.g., daily logs, weekly analyses >60 days old).
- ❖ 🤖 **AI Action:** Generates a summary of older data.
- ❖ 💬 **Your Action (Crucial):** Carefully review AI summary; manually decide on archiving/deleting originals in TIP.
- ❖ 📄 **Output Doc:** `CondensedContext_[Period]_[Date]` (AI-generated, reviewed and saved by you).
- ❖ ⭐ **Value:** Keeps knowledge base lean and relevant for AI; requires significant human judgment. (Benefit: ✎ Efficiency)



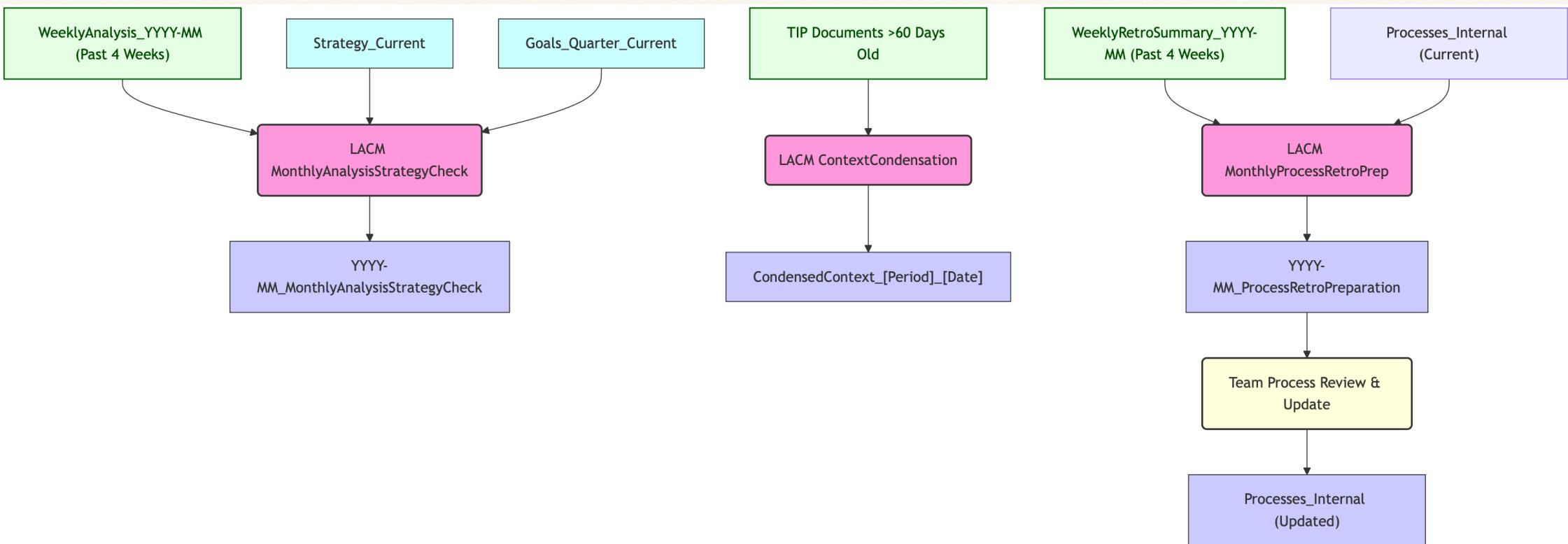
Monthly Ritual ✨: **Process Retrospective & Update**

Monthly Tune-Up: AI-Prepped Process Review

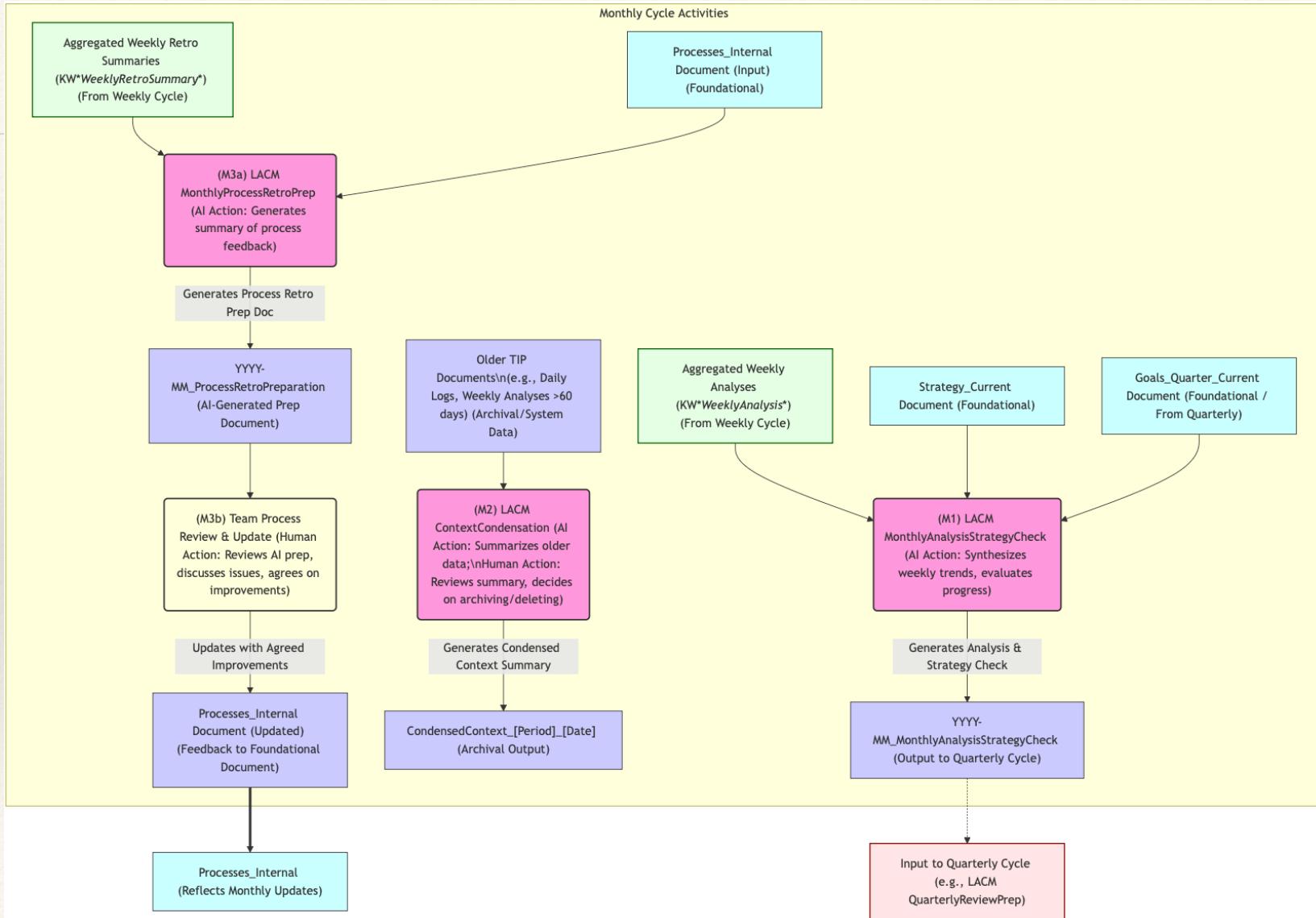
- ❖ 🚀 **TIP Workflow (Prep):** Run `LACM MonthlyProcessRetroPrep`.
- ❖ **Input Docs (AI Prep):** `KW*_WeeklyRetroSummary_*` (for the month, created using `LACM WeeklyRetroSummary` Template), `Processes_Internal` (from `LACM Processes` Template).
- ❖ 🤖 **AI Action:** Generates `YYYY-MM_ProcessRetroPreparation` summarizing process feedback.
- ❖ 💬 **Your Action (Team):** Review AI prep, discuss process issues. Update `Processes_Internal` (using `LACM Processes` Template) with agreed improvements and save.
- ❖ ⭐ **Value:** Systematic improvement of core operational workflows.
(Benefit: 🚀 Optimization)



Weekly Cycle Overview (Simplified)



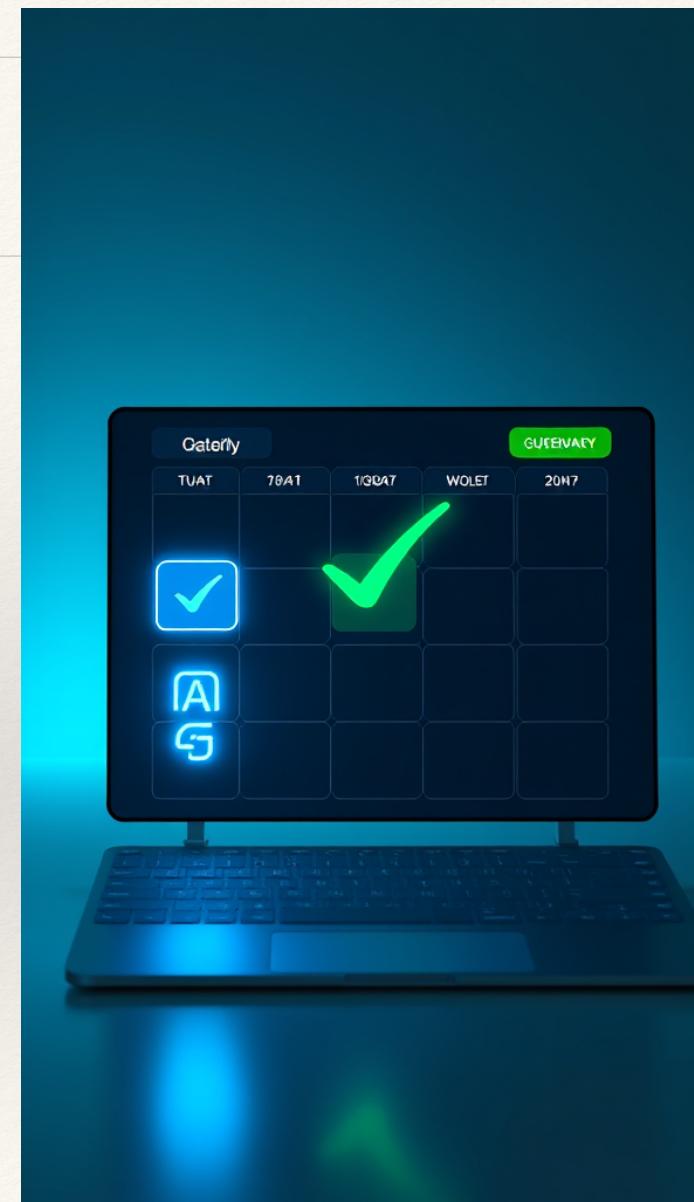
Weekly Cycle Overview (Detailed)



Quarterly Ritual 🎯: Review & Goal Setting

Quarterly Checkpoint: AI-Powered Review & Goal Setting

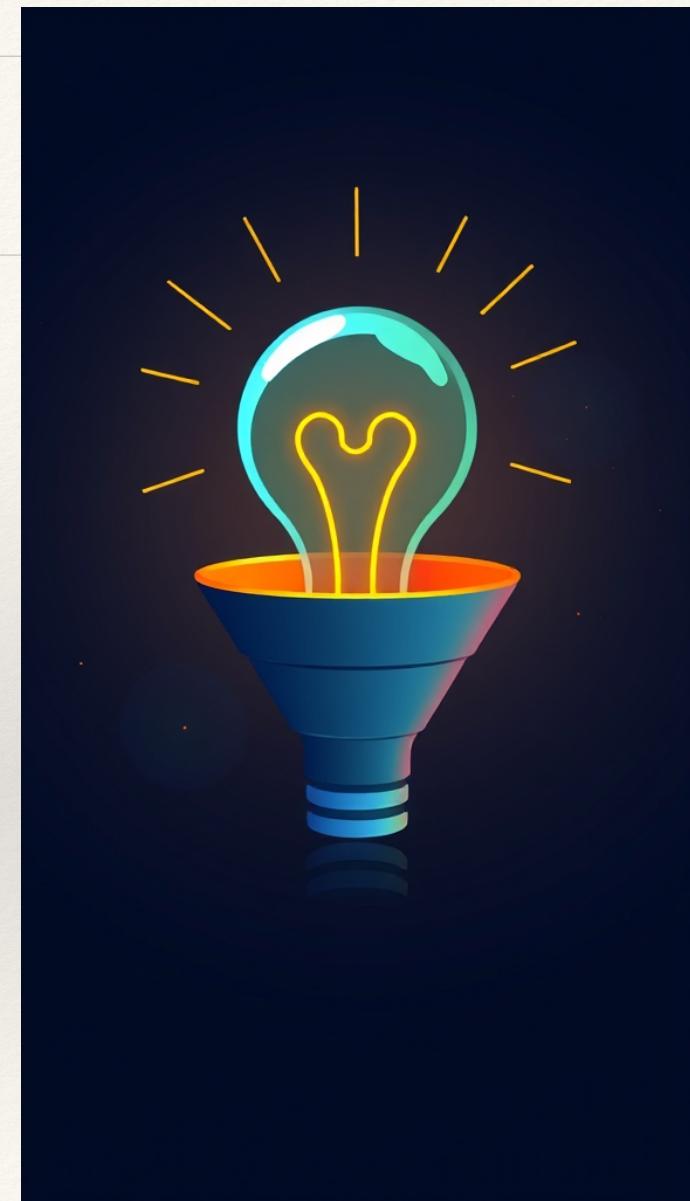
- ❖ 💡 **TIP Workflow (Prep):** Run `LACM QuarterlyReviewPrep`.
- ❖ **Input Docs (AI Prep):** `YYYY-MM_MonthlyAnalysisStrategyCheck` (for the quarter), expiring `Goals_Quarter_Current` (from `LACM QuarterlyGoals` Template), `Strategy_Current` (from `LACM Strategy` Template), optional: `PrioritizedInnovationInitiatives_Current` (from `LACM PrioritizedInnovationInitiatives` Template), other user-created performance summaries.
- ❖ 🤖 **AI Action:** Generates `Q[CurrentQuarter]_[Year]_ReviewPreparation_DraftOKRs_Q[NextQuarter]`.
- ❖ 👤 **Your Action (Team):** Use AI prep for strategic discussion. Create/Update: New `Goals_Quarter_Q[NextQuarter]_[Year]` (using `LACM QuarterlyGoals` Template), potentially updated `Strategy_Current` (using `LACM Strategy` Template).
- ❖ ⭐ **Value:** Data-driven quarterly planning, strategic alignment, clear 90-day direction.
(Benefit: 🌏 Roadmap)



Quarterly Ritual💡 : Innovation Management

Sparkling Innovation: AI-Assisted Idea Generation & Evaluation

- ❖ 💡 **TIP Workflow (Idea Gen):** Run `LACM InnovationIdeaGeneration`.
- ❖ **Input Docs (AI Idea Gen):** Recent analysis docs, `Competitors_Current` (from `LACM Competitors` Template), `CustomerFeedback_Log` (from `LACM CustomerFeedback` Template), `IdeaBacklog` (from `LACM IdeaBacklog` Template), `Strategy_Current` (from `LACM Strategy` Template).
- ❖ 🤖 **AI Action:** Generates `NewIdeas_Q[CurrentQuarter]_YYYY-MM-DD`.
- ❖ 👤 **Your Action (Team):** Review AI ideas, add human ideas to `IdeaBacklog` (using `LACM IdeaBacklog` Template). Manually evaluate and update `PrioritizedInnovationInitiatives_Current` (using `LACM PrioritizedInnovationInitiatives` Template).
- ❖ 📄 **Output Docs (AI + Human Updated):** `NewIdeas_...`, updated `IdeaBacklog`, updated `PrioritizedInnovationInitiatives_Current`.
- ❖ 💫 **Value:** Structured approach to fostering, capturing, evaluating, and prioritizing new ideas. (Benefit: ✨ Innovation)

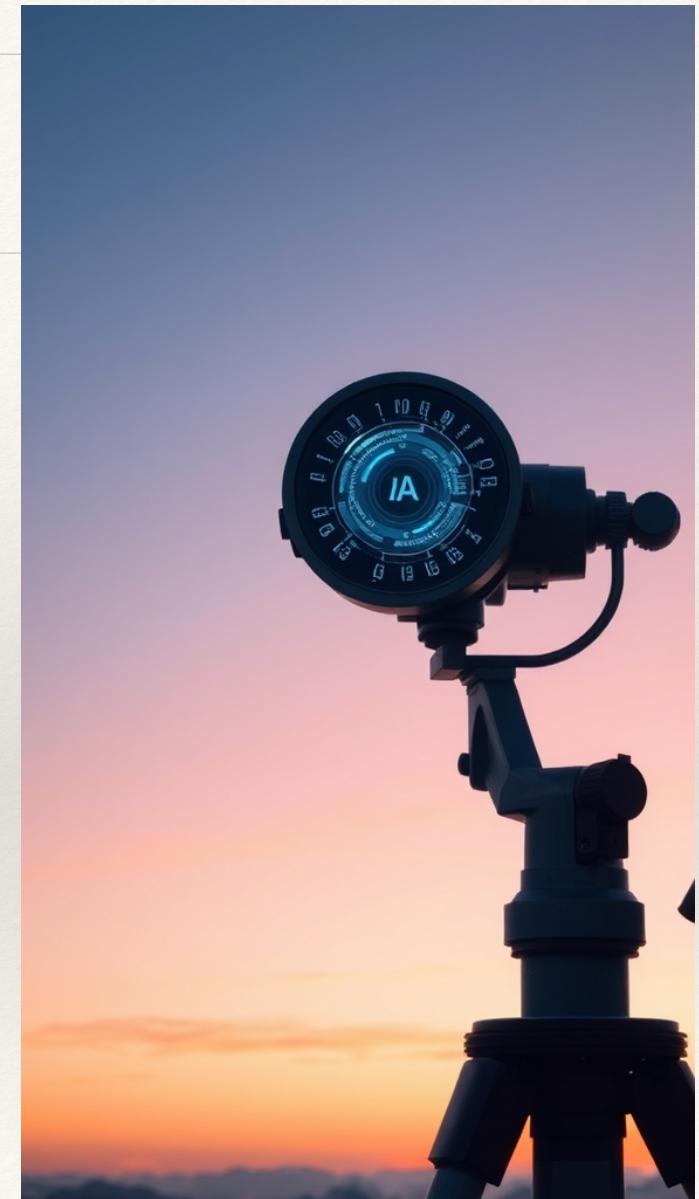


Annual Ritual 🌎:

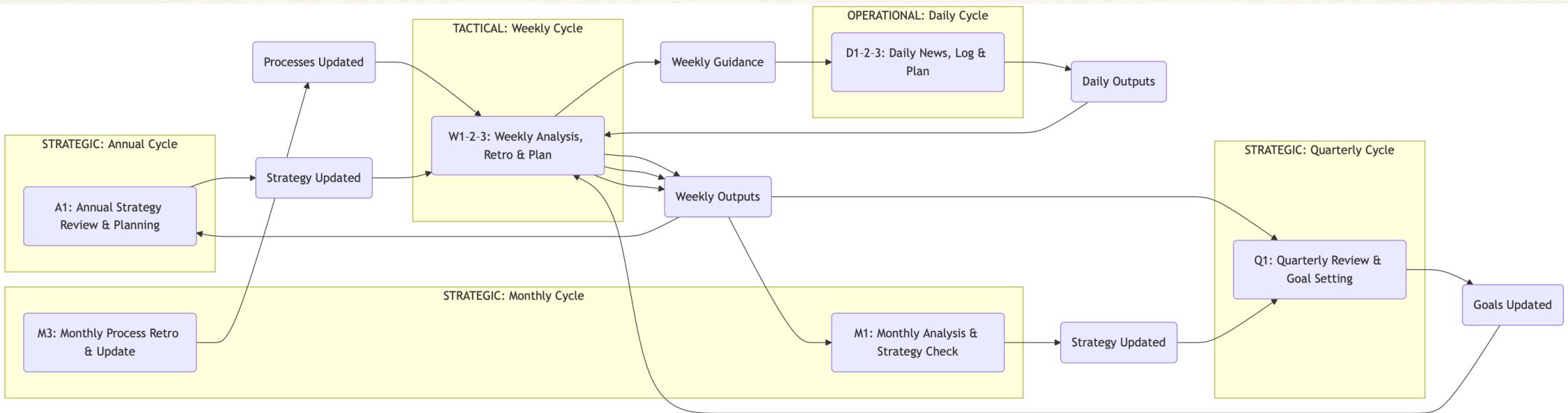
Strategy Review & Long-Term Planning

Yearly Horizon: AI-Supported Annual Strategy & Planning

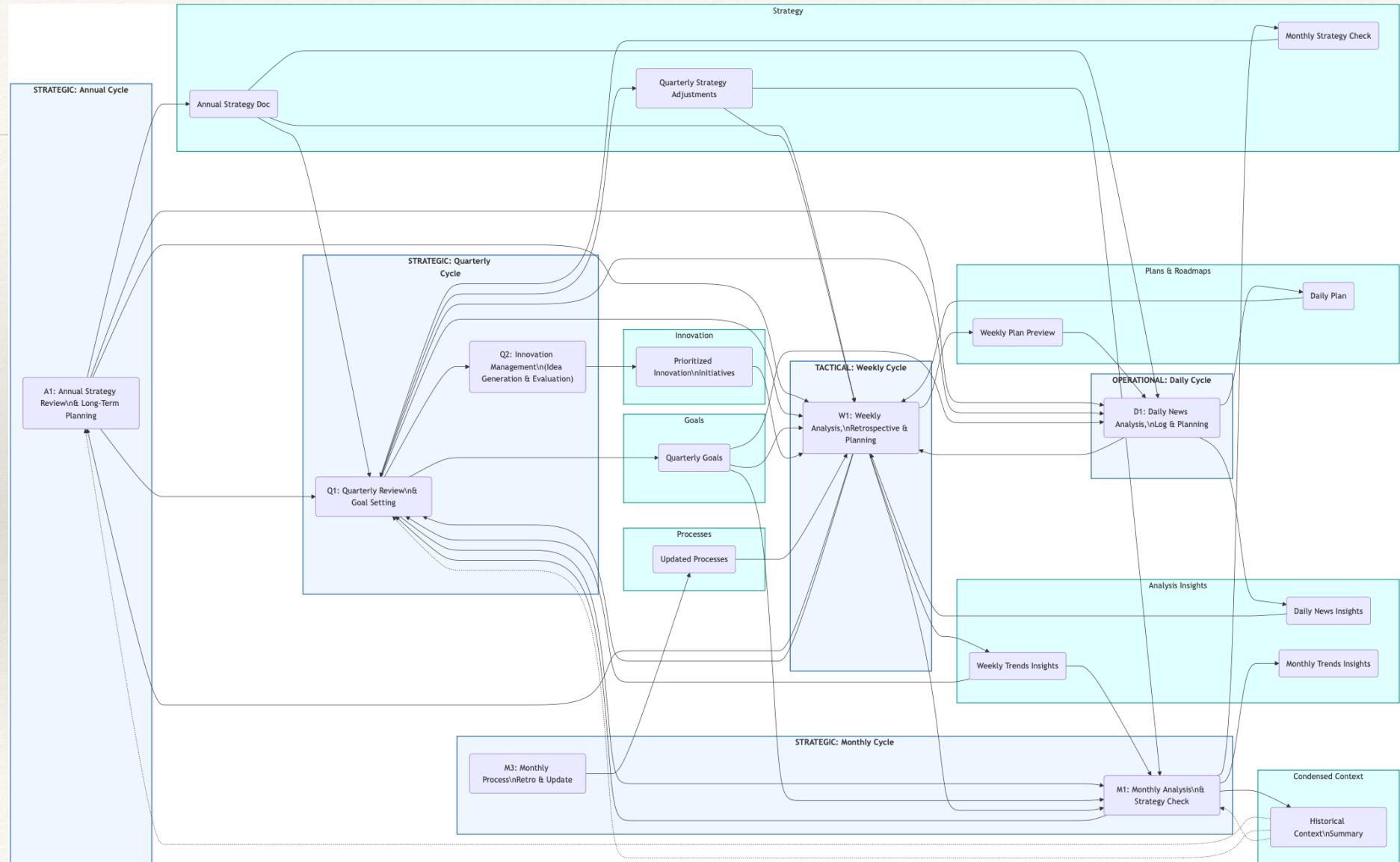
- ❖  **TIP Workflow (Prep):** Run `LACM AnnualStrategyAnalysisPrep`.
- ❖ **Input Docs (AI Prep):** All `Q*_ReviewPreparation_*` files for the year, user-created annual financial/market summaries, expiring `Strategy_Current` (from `LACM Strategy` Template).
- ❖  **AI Action:** Generates `[Year]_AnnualStrategyAnalysisInput`.
- ❖  **Your Action (Team):** Use AI analysis for deep strategic discussions. Create/Update: Significantly updated `Strategy_NextYear` (becomes current, using `LACM Strategy` Template), optionally `YYYY_AnnualReport_Strategy` (user-created, can use `A blank Template` or specific report template if available).
- ❖  **Value:** Ensures long-term strategic relevance and sets overarching direction for the upcoming year. (Benefit:  Vision)



Cycle Interactions Overview (Simplified)



Cycle Interactions Overview (Detailed)



Summary: The LACM Achievement with TIP 🤝

Your Achievement: AI as a True Team Collaborator in TIP

- ❖ **Systematic AI Integration:** AI is now part of your daily, weekly, monthly, quarterly and annual routines within TIP.
- ❖ **Structured Knowledge Base:** You've built a version-controlled, searchable "team brain" in TIP.
- ❖ **Enhanced Decision-Making:** Proactive insights from AI-analyzed news and internal data across all timeframes.
- ❖ **Improved Efficiency:** Streamlined planning, documentation, and review cycles from daily to strategic levels.
- ❖ **Continuous Learning Loop:** Rituals ensure your processes, knowledge, and strategy continuously improve.
- ❖ **Data-Driven Operations:** From daily tasks to long-term vision, decisions are better informed.
- ❖ **You're not just using AI; you're co-managing your work WITH AI, leveraging the Team Intelligence Platform.**

