# How to delegate

How to delegate

1. What delegation is and why it is important
2. Examples of delegation
3. The delegation system
4. The 5 channels of delegation
5. Cardinal sins of delegation

# What/why delegation

# SLIDE STORYBOARD — “Delegation: The Transfer of Judgment Across Generations”

### Slide Layout Overview (PowerPoint / Google Slides)

**Slide Ratio:** 16:9
**Design Intent:** A single elegant image-based timeline; minimal text; emotional silence between eras.
**Goal:** Show that the principle of delegation — *the transfer of judgment* — is timeless.

## VISUAL STRUCTURE

**Top Title (centered):**

> **Delegation: The Transfer of Judgment Across Generations**

### MAIN BODY (Two-Column Split Layout)

**Left Column – 1960s: IBM**

- **Image:** Archival black-and-white photo of Thomas J. Watson Jr. at IBM headquarters or System/360 launch.
  (Optional: subtle background texture of punch cards or early computer panels.)

- **Quote (centered over photo, in white text or muted cream):**

  “If I have to make every decision,
  I’ve failed to build a company that can think.”
  *— Thomas J. Watson Jr., IBM (1960s)*

**Right Column – 2010s: Microsoft**

- **Image:** Color photo of Satya Nadella addressing a Microsoft all-hands or developer event.
  (Cool blue/azure tones with modern tech energy.)

- **Quote (centered over photo):**

"Our job isn't to be know-it-alls,
but learn-it-alls."
— *Satya Nadella, Microsoft (2010s)*

### Connecting Element (Centerline)

- A **thin golden horizontal line** connecting the two images, symbolizing continuity of principle.
- At midpoint, a subtle gear-like or neural-network icon labeled **"Transfer of Judgment."**

### Bottom Takeaway Box (Full Width, White or Minimal Background)

**Text (centered, minimal):**

Delegation isn't the transfer of tasks —
it's the **transfer of judgment**, anchored in context, priorities, and trust.

Watson built a company that could **think.**
Nadella built a company that could **learn.**

*That's the true measure of leadership — how well your judgment survives your absence.*

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# SPEAKER SCRIPT (90 seconds total)

*(Use the slide as a visual anchor — no text read verbatim.)*

"Half a century apart, Thomas Watson Jr. at IBM and Satya Nadella at Microsoft faced the same leadership problem — how to scale judgment without losing control.

Watson realized that if every decision ran through him, IBM could never think for itself. He began transferring not just work, but *judgment* — context, priorities, and trust. That's what produced the System/360 — a billion-dollar risk made possible by leaders who could think as he did.

Fifty years later, Nadella found Microsoft paralyzed by hierarchy and fear of mistakes. He told his teams, *'Our job isn't to be know-it-alls, but learn-it-alls.'*

He replaced control with curiosity — building a system where better thinking could scale faster than his own decisions.

That's what real delegation is.
It's not losing control.

It’s designing a system where your best judgment endures — even when you’re not in the room.”

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## 🧩 Design & Style Specs

| Element | Specification |
|---|---|
| **Font** | Title: 36 pt serif (e.g., Playfair Display or Georgia Bold).<br>Quotes: 26 pt italic serif.<br>Takeaway: 22 pt sans-serif (Helvetica Neue / Calibri Light). |
| **Color Palette** | Left: grayscale (heritage). Right: Microsoft blue gradient. Centerline: gold accent (#C5A25D). |
| **Whitespace** | Minimum 40% negative space per side. No clutter or bullet lists. |
| **Animation Sequence** | 1. Title fade in.<br>2. Watson quote fade left → hold 3 sec.<br>3. Nadella quote fade right → hold 3 sec.<br>4. Bottom takeaway fade up last, with brief pause before final line. |
| **Tone** | Quiet authority. No transitions or gimmicks. Let silence punctuate the moral. |

# Examples of delegation

# SLIDE — Examples of delegation

*(Subtitle: From Relief to Reinvention)*

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## Slide Layout (16:9 Grid)

**Visual Design Concept:**

- 5 horizontal panels or tiles, each representing one level of delegation maturity.
- Each tile has:
  - 1 **title** (memorable label)
  - 3 **example actions** (verbs + simplicity)
  - 1 **small outcome statement** (the benefit line)
- A faint progression bar or gradient from left (light gray) → right (deep gold) to represent increasing leverage.

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### Level 1 – Delete Annoyance *(Simple Relief)*

🧹 **Never do what drains you again.**

- On-Hold Killer → Never wait on hold again
- Checkout Pass → Never shop online again
- Subscription Audit → Never read or pay for what you don't use
  → **Save ~5 hrs/week by cutting friction**

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### Level 2 – Own Your Day *(Intentional Design)*

⏰ **Reclaim your rhythm.**

- Inbox Predrafts → Emails pre-written and polished
- Calendar Reset → Schedule optimized for flow
- Goal Guard → Stay aligned with priorities
  → **Reclaim 5–15 hrs/week and set the pace you want**

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### Level 3 – Run Life Like a Hotel *(Systemized Living)*

🏨 **Make your personal life run with professional precision.**

- Stock Refill → Never run out of essentials
- Remote Home Manager → Household run from anywhere
- Concierge Desk → Bookings handled with taste and speed
  → **Cut 5–10 hrs/week of chores—life runs smoothly**

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**Level 4 – Multiply Your Impact *(Scale Without Strain)***

🚀 **Build reach and leverage.**

- Salon Dinners → Curate meaningful networks
- Talent System → Hire and onboard faster
- Custom Podcasts → Learn while you live
  → **Hire faster, learn quicker, lead better**

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**Level 5 – Live the Next Version of You *(Black Diamond Delegation)***

🖤 **Elevate from efficient to intentional.**

- Sleep Score Scheduling → Data-driven rest planning
- Homework Buddy → Learning support for your kids
- Weekend Wonders → Curated family adventures
  → **More rest, stronger ties, higher influence**

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### Visual Footer (Center, Minimalist Tagline):

> *Every hour you delegate is an hour you reinvest in what only you can do.*
> — Athena Operating Principle

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## 🎙️ Speaker Script (≈2 minutes)

> “When people first hear the word ‘delegation,’ they often think about tasks.
> But the real journey of delegation is transformation — from deleting friction to designing a life that scales your judgment and values.

At the most basic level, it starts with **relief** — deleting annoyances that drain energy: holding, checking out, managing subscriptions. You reclaim time just by cutting friction.

Then comes **design** — owning your day with intention. Your inbox, your calendar, your workouts — all pre-structured for clarity and focus.

As you move forward, you **systemize** — running your life like a hotel. Everything restocks, runs, and renews without your supervision.

Then you **multiply** — using delegation not just to save time but to expand impact: hosting, hiring, learning, leading.

And finally, the highest level — **reinvention**.
When delegation becomes not just operational but existential. Your systems protect your energy, deepen your relationships, and allow you to live as the next version of yourself.

That's not outsourcing. That's *operating differently.*
Every hour you delegate becomes an hour you reinvest in what only you can do."

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## 🎨 Design Specs

| Element | Specification |
|---|---|
| **Title font** | 40 pt serif or display font (e.g., Freight Display / Playfair). |
| **Section headers** | 22–24 pt sans-serif bold, all caps or small caps. |
| **Body text** | 18–20 pt regular sans. |
| **Color palette** | Gradient: Light gray → slate blue → deep gold. Use gold for Level 5 accents. |

| | |
|---|---|
| **Icons** | Simple line icons (featherweight Apple aesthetic). One per level: broom, clock, keycard, rocket, diamond. |
| **Animation** | Sequential reveal from left to right; each panel builds as you narrate. |
| **Slide pacing** | ~20–25 seconds per level, 2 minutes total. |

# The delegation system

# The Delegation System: From Tasks to Judgment

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## Visual Layout (16:9, Three Horizontal Bands)

Each band represents a layer of the system — **Spectrum**, **Structure**, and **System** — moving from *theory* to *practice*.
The visual flow reads top-to-bottom, with a subtle gradient from steel gray → blue → gold, symbolizing increasing autonomy and judgment.

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#### 🩶 I. The Spectrum: How Delegation Matures

*(Visual: thin horizontal continuum with four nodes — Task → Process → Objective → Judgment.)*

| Level | Focus | Delegation Style | XP Autonomy |
|---|---|---|---|
| **Task** | Steps | "Do this exactly this way." | 🔒 Low |
| **Process** | SOP | "Follow the standard way we do this." | ⚙️ Moderate |
| **Objective** | Outcome | "Here's the goal — decide how." | 🔓 High |
| **Judgment** | Context | "Here's the intent — use your best judgment." | 🧭 Full Trust |

**Key Idea (caption):**

> The goal isn't to delegate work — it's to delegate *thinking.*

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## 🔵 II. The Structure: Two Languages of Delegation

*(Visual: two side-by-side boxes connected by a gold line labeled "Mature Systems Use Both.")*

| Dimension | SOP (Task-Based) | Protocol (Objective-Based) |
|---|---|---|
| **Purpose** | Ensure consistency | Enable judgment |
| **Focus** | How to execute | When / Why to act |
| **Example** | "Book travel using Concur by Friday." | "If a flight cancels, rebook within 90 min; escalate if over $2K." |
| **Goal** | Efficiency | Empowerment |

**Key Idea (caption):**

> SOPs protect quality; Protocols protect judgment.
> The shift from SOP → Protocol is the shift from *doing* to *leading.*

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## 🟡 III. The System: How It Scales

*(Visual: overlapping circles labeled "Execution Library (SOPs)" and "Judgment Library (Protocols)" with gold overlap = "Clarity + Trust.")*

**Execution Library (SOPs)**

- Step-by-step guides for repeatable processes
- Owned by XP team
- Drives consistency and speed

**Judgment Library (Protocols)**

- Decision rules for high-stakes or ambiguous situations
- Owned jointly by leader + XP
- Drives trust and adaptability

**Key Idea (caption):**

Every SOP should have a matching Protocol.
Together they create *clarity* + *trust* — the foundation of scalable delegation.

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### Footer Tagline (centered, minimalist):

Delegation isn't about control lost — it's judgment multiplied.

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## 🎙️ SPEAKER NOTES (≈2 minutes total)

"Delegation isn't binary — it's a spectrum of maturity.

At the beginning, we delegate **tasks** — 'Do this exactly this way.' That's safe but slow.
As people grow, we move to **process** — SOPs that create consistency. Then to **objectives** — outcomes with autonomy. And finally to **judgment** — intent paired with full trust. That's when leadership scales.

But language matters. High-performing teams use both **SOPs** and **Protocols.**
SOPs protect quality; they tell us *how* to execute.
Protocols protect judgment; they tell us *when and why* to act.
The most effective leaders know when to use each.

And when you combine them, you get a system:
an **Execution Library** of SOPs and a **Judgment Library** of Protocols.

Where they overlap, you get **Clarity + Trust** — the core of scalable delegation.

That's how you stop delegating work and start delegating thinking.
It's how your systems learn to lead even when you're not in the room."

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# 🎨 DESIGN NOTES

| Element | Recommendation |
|---|---|
| **Structure** | 3 clean horizontal zones: Spectrum → Structure → System. Each ~⅓ of slide height. |
| **Color Palette** | Top (gray), middle (slate blue), bottom (gold) — smooth gradient representing progression of autonomy. |
| **Icons** | Top: continuum line with lock → gear → key → compass.<br><br>Middle: lock (SOP) and compass (Protocol).<br><br>Bottom: Venn diagram overlap labeled “Clarity + Trust.” |
| **Typography** | Title: 38 pt serif (Playfair / Georgia Bold).<br><br>Headers: 24 pt sans bold (Inter / Helvetica Neue).<br><br>Body: 18–20 pt. |
| **Animation** | 1️⃣ Spectrum fade in left → right<br><br>2️⃣ SOP vs. Protocol crossfade<br><br>3️⃣ Circles overlap and reveal “Clarity + Trust.” |
| **Tone** | Strategic, calm, intelligent — Clay Christensen meets McKinsey clarity. |

# Channels of delegation

# The Five Channels of Delegation

*(Subtitle: From Emergency Response to Engine of Leverage)*

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### Visual Layout (16:9, Left-to-Right Horizontal Flow)

A **progression bar or timeline** showing five nodes (Thumbs → Fingers → Voice → Video → Proactive).
Color gradient: gray → blue → teal → gold → deep gold.
Each node has a short label, icon, and one-line purpose.

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| Level | Name | Core Use | Best Practice |
|---|---|---|---|
| 🩶 **1. Thumbs** | *Emergency Only* | Delegating from your phone. Use only if there's no other option. | Minimal — last resort. |
| 🔵 **2. Fingers** | *Standard* | Delegate via email/text on your computer. | Use dedicated XP channel (Signal, WhatsApp). Create specific threads: URGENT, Focus, Reminders, Random. |
| 🗣️ **3. Voice** | *Speed Champion* | Fastest way to delegate most tasks; conveys tone & nuance. | Use voice-to-text or voice apps (Wispr Flow). |
| 🎥 **4. Video (Loom)** | *Show, Don't Tell* | When tasks need walkthroughs or visuals. | Record screen + narration for async clarity. |
| 🟡 **5. Proactive** | *Ultimate Leverage* | XP proposes and self-assigns tasks daily/weekly. | 30-min daily scan + 👍/👎 review + ROI tracking sheet. |

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**Key Idea (centered caption beneath table):**

> Delegation maturity isn't just *what* you delegate — it's *how* you communicate.
> Each level moves from reactive to proactive, from speed to scale.

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**Footer Tagline:**

> *When your XP can delegate to themselves, you've reached true leverage.*

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## 🎙️ SPEAKER NOTES (≈2 minutes total)

"Delegation doesn't just depend on *what* you hand off — it depends on *how* you communicate.

There's a maturity curve here.

At the most reactive end are **Thumbs** — quick, on-phone delegation. Use it only in emergencies. It's fast, but fragile — things get lost.

Then come **Fingers**, your standard channel. Delegate via desktop text or email — ideally through a dedicated space just for your XP. Keep chats segmented: *Urgent, Focus, Reminders, Random*. It keeps clarity and retrieval high.

**Voice** is your speed champion. Speaking conveys tone and context in seconds — especially with tools like Wispr Flow or voice-to-text.

**Video**, like Loom, is for "show, don't tell" situations — perfect for walkthroughs or training your XP asynchronously. It's how you turn one explanation into a reusable asset.

And finally, **Proactive Delegation** — the ultimate level. Here, your XP assigns tasks to themselves. They block time each day to identify what they can take on. You approve with 👍 or 👎, and track ROI over time.

The shift from Thumbs to Proactive is the shift from *reaction* to *replication.*
When your XP can think and act ahead of you, delegation becomes an engine of leverage."

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## 🎨 DESIGN SPECIFICATIONS

| Element | Recommendation |
| --- | --- |
| **Structure** | Horizontal progression bar (left → right) with five labeled nodes; each with emoji/icon + one-line description. |
| **Color palette** | Gradient: gray → blue → teal → gold → deep gold. Each node slightly brighter. |
| **Icons** | 1️⃣Thumbs = 👍2️⃣Fingers = 💻3️⃣Voice = 🗣️4️⃣Video = 🎥5️⃣Proactive = 🔆 |
| **Typography** | Title 38 pt serif (Playfair / Georgia).<br>Body 20 pt sans (Inter / Helvetica Neue).<br>Captions italicized. |
| **Animation** | Sequential reveal of nodes left → right, ending with a soft glow on “Proactive Delegation.” |
| **Tone** | Crisp, modern, high-clarity — think Apple Keynote meets Harvard case visual. |
| **Duration** | 2 minutes spoken, with 10 seconds reflection pause at the end. |

# Cardinal Sins of Delegation

# The Cardinal Sins of Delegation

*(Subtitle: The Hidden Beliefs That Block Leverage)*

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### Visual Layout (16:9 Grid, Three Vertical Columns)

Each column represents one "sin."
Top: a minimalist icon + the sin (in one word, bold).
Middle: the false belief (italicized).
Below: the **Truth** and **Practice**, cleanly stacked.
At the bottom of each column: a short **poster line** — the distilled leadership mantra.

Color palette: muted black background, each column in a distinct accent hue — **Pride (crimson)**, **Scarcity (gold)**, **Guilt (blue-gray)**.
Typography: large, confident serif headline + smaller sans-serif for supporting text.

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| | PRIDE | SCARCITY | GUILT |
|---|---|---|---|
| **Belief** | *"I can do it faster or better."* | *"I can't invest time, access, or budget."* | *"This work is beneath someone."* |
| **Truth** | Your job is to do only what only you can do. | Leverage shows up where you fund it. | What bores you can build another. |
| **Practice** | If someone can do it 70% as well with a clear brief, delegate — then coach to 90%+. | Give the vault: context, files, and decision rules. Provide tight feedback loops and the tools to win. | Frame the *why*, define outcomes and quality bar, and treat tasks as training — not dumping. |
| **Poster Line** | **Do only what only you can do.** | **Give access, get leverage.** | **Work isn't beneath; it's a ladder.** |

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### Footer Tagline (centered, minimal):

> Delegation fails not for lack of systems — but because of the stories leaders tell themselves.

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# 🎙️ SPEAKER NOTES (≈2 minutes total)

"Most delegation failures aren't tactical — they're emotional.
They come from what I call the *cardinal sins of delegation*: **Pride, Scarcity, and Guilt.**

**Pride** says, 'I can do it faster or better.' And that's often true — in the short term.
But leadership is about leverage, not speed.
Your job is to do only what only you can do — and teach others to close the gap from 70% to 90%.

**Scarcity** says, 'I don't have the time, access, or budget to delegate this.'
But leverage shows up where you fund it. Delegation is an investment.
Give people the vault — the files, the context, and the trust — so they can win without waiting on you.

And **Guilt** says, 'This work is beneath someone.'
But what bores you might build another. Delegation is how people learn.
Frame the why, define the outcome, and treat every handoff as training, not dumping.

If you remember nothing else, remember the mantras:
**Do only what only you can do.**
**Give access, get leverage.**
**Work isn't beneath; it's a ladder.**"

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# 🎨 DESIGN SPECIFICATIONS

| Element | Recommendation |
|---|---|
| **Layout** | Three-column grid, equal width, each with its own tone color (crimson / gold / blue-gray). |
| **Icons** | Pride = 🦁 (or simple crown icon), Scarcity = 🔒, Guilt = 💭 or heart outline. |
| **Typography** | Title 40 pt serif; section headers 26 pt sans bold; body 18–20 pt. Poster lines in uppercase small caps. |
| **Color Palette** | Deep black background, colored columns with white text. Use accent glow under poster lines for emphasis. |
| **Animation** | Columns fade in sequentially: Pride → Scarcity → Guilt → unified poster lines glow. |

| | |
|---|---|
| **Tone** | Candid, elegant, minimal — a modern leadership manifesto slide. |
| **Duration** | 2 minutes max, with a pause on the last line for reflection. |

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# Mastery - Trust

# Athena | Executive Playbook

### How to Build Trust

Every leader loses time to the same silent thief: low-trust execution. Calls stall. Tasks boomerang. Context gets explained twice. The result? Five to ten hours a week—gone.

In this 30-minute session, you'll learn how to win those hours back. Drawing on thousands of high-performing executive–Executive Partner partnerships, we'll show you how to turn support into strategic leverage. Expect practical tools, candid insight, and fast-paced exchanges with peers who move at your speed.

You'll leave with two proven trust-building systems:

- **The Horse Race**: a simple, visual way to delegate decisions while keeping quality high. It builds judgment and autonomy fast.
- **The Weekly Activities Report** (WAR): a crisp, five-minute rhythm that keeps you aligned without micromanagement—trust tracked, not assumed.

Because when trust compounds, so does time.

## Why trust matters

For decades, educators struggled to crack the problem of improving student performance. Then came a simple experiment: students in grades 1–6 took a fake "aptitude test." Teachers were told which students scored in the top 20%. In reality, the names were chosen at random.

By the end of the year, those "top 20%" students had outperformed their peers. Nothing had changed except one thing: the teachers trusted them more. They gave them harder work, expected more, and the students rose to the level of trust placed in them.

When you don't trust your XP, you pay a trust tax. You hold onto work they could do, which costs you 10+ hours a week and keeps them from growing into higher-value work. With trust, the opposite happens: you buy back time, sharpen focus, and create leverage.

High-trust delegation doesn't just save hours—it frees energy, clears decision bandwidth, and lets you focus only on what moves the business forward.

👉 Then you immediately transition into: "So how do you actually build trust quickly with your XP? Here are two proven methods:

# The Horse Race Method

## Purpose

Effective delegation hinges on your assistant understanding both your explicit instructions and your implicit reasoning. The Horse Race Method accelerates this by having you and your assistant complete the same task in parallel, then debriefing to surface preferences, trade-offs, and decision logic.

## Method

### 1. Set the Track

**Define clear parameters for a task.**

- **Example:** *“Book a nonstop flight to San Francisco, Tuesday afternoon departure, Thursday evening return. Preference for aisle seat and hotel within walking distance of the convention center.”*

### 2. Start the Race

**Both you and your assistant complete the task independently. Record using Zoom/Loom so that you can objectively compare and contrast.**

- **Example:** Both of you book a trip to San Francisco under the same parameters.

### 3. Compare Results

**Review both outputs side by side.**

- **Example:** The assistant found a cheaper flight; you found a better hotel rate. The assistant spent 60 minutes; you spent 10 minutes.
- **Discuss trade-offs:** *“The $200 flight savings is great, but the hotel you chose is a 20-minute walk from the venue, which impacts my schedule.” “Your time is valuable, this is how I think about ROI of your time.”*

### 4. Give Specific Feedback

**Highlight what worked, what didn’t, and—most importantly—why.**

- *"I prefer the 2 PM flight you found because it allows a morning meeting. But I always pick hotels with 24-hour gyms for jet lag workouts. That's why I chose mine."*

### 5. Refine and Repeat

**Run several "races" until your assistant consistently anticipates your preferences and decision-making.**

- The goal is deep understanding, not speed.

## Example Progression

- **Round 1 — Day Trip (Chicago)**
  - Exec: Early flight, day-use hotel, car service.
  - EA: Later flight, no hotel, taxi.
  - Feedback: *Explain need for early arrivals, refresh space, reliable transport.*

- **Round 2 — Multi-Day Trip (London)**
  - Exec: Red-eye, hotel with gym near venue, jet lag gaps.
  - EA: Day flight, cheaper distant hotel, tight schedule.
  - Feedback: *Teach logic of maximizing time, comfort, recovery strategy.*

- **Round 3 — Multi-City Trip (Europe)**
  - Exec: Balance business/leisure, flexible tickets, detailed logistics.
  - EA: Similar but misses nuances on mixing work and personal time.
  - Feedback: *Surface deeper decision patterns: when to extend trips, how to stay productive abroad.*

## Why It Works

- Sharing reasoning demonstrates respect, invites dialogue, and positions the XP as a partner.
- The side-by-side comparison makes invisible decision logic visible and transferable.
- Repetition builds proof that the XP can deliver outcomes indistinguishable from the executive's own choices—or better.

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## How to Use in Practice

- Pick a recurring, high-context task (travel booking, meeting prep, inbox triage).
- Run 2–3 Horse Races until outputs converge.

- Capture the learned logic in a preferences SOP so it compounds. Here's a template library.

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👉 **By the end, your XP doesn't just "do tasks"—they think with your logic, act with your preferences, and anticipate your moves.**

# WAR — Weekly Activities Report

**Purpose**
Executives lose time when there's no clear rhythm of accountability. Work drifts, priorities misalign, and course corrections arrive too late. The WAR fixes this. It's both a retro of the week just finished and a plan for the week ahead—giving you visibility on what was achieved, what slipped, and where your input is needed before the new week begins.

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**How**

1. Every Friday by 3 p.m., your XP sends a one-page WAR.
2. The report has two parts: Retro (the week past) and Plan (the week ahead).
3. Retro covers: *Planned vs. Done, What Moved (with reasons), Learnings.*
4. Plan covers: *Top Priorities, Dependencies, and Decisions Needed.*
5. You give feedback by Monday 9 a.m.—approve, adjust, or redirect.
6. This rhythm compounds: alignment increases, bottlenecks shrink, trust grows.

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**What (Worked Example)**

**Retro: Week of Aug 25–29**
– *Investor Meetings*: Planned to secure 3 meetings. Booked with Sequoia (Mon 8/25, 10 a.m.), Index Ventures (Tue 8/26, 2 p.m.), and Tiger Global (Thu 8/28, 4 p.m.). The Sequoia and Index sessions confirmed; Tiger requested to shift to Sep 10.
– *Board Memo*: Drafted 14-page deck by Wed 8/27, circulated to finance + strategy leads on Thu 8/28. Awaiting your review before final polish.
– *Vendor Contract*: Targeted sign-off with Salesforce on Tue 8/26. Delayed after Legal flagged an indemnity clause. I scheduled a follow-up with Salesforce counsel for Mon 9/1 at 11 a.m.
– *Marketing Calendar*: Reviewed draft campaign schedule with BlueSky Creative on Wed 8/27. Two deliverables (Q4 ad concepts) slipped—the team underestimated design hours. Revised deadline set for Tue 9/2.

**Learnings**
– Legal reviews are taking 3+ business days—recommend building in a buffer.
– Creative vendor under-scoped resource needs—need firmer estimates upfront.

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**Plan: Week of Sept 1–5**
– Finalize Salesforce vendor contract by Wed 9/3.
– Deliver final board memo to directors by Fri 9/5, 12 p.m.
– Launch Q4 hiring search: post roles on LinkedIn (Tue 9/2), start outreach via Greenhouse (Wed 9/3).
– Confirm travel logistics for NYC Investor Day (Oct 14–16): secure hotel block at the Whitby by Thu 9/4.

**Needs Input by Monday 9 a.m.:**
– Of three marketing director candidates (Lee, Patel, Nguyen), which two should we prioritize for first-round interviews?
– Approve NYC investor day travel dates (Oct 14–16) so I can lock hotel block and flights.

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**Why**: trust and alignment.
**How**: retro + plan, sent weekly.
**What**: a specific, one-page report that shows results, surfaces issues, and sets up the coming week with your input.

# Weekly Activities Report (WAR)

**Executive:** Sarah Lee
**Assistant:** Daniel Cruz
**Week Ending:** Friday, August 29, 2025

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## Retro: Week of Aug 25–29

**Planned vs. Done**

- *Investor Meetings* → Secured and completed meetings with **Sequoia** (Mon 8/25, 10:00 a.m.), **Index Ventures** (Tue 8/26, 2:00 p.m.), and **Tiger Global** (Thu 8/28, 4:00 p.m.). Tiger rescheduled to Sept 10.
- *Board Prep Memo* → Drafted 14-page deck by Wed 8/27, circulated to Finance and Strategy leads Thu 8/28. Awaiting your comments.

- *Vendor Contract* → Targeted sign-off with **Salesforce** (Tue 8/26). Delayed—legal flagged indemnity clause. Follow-up call booked for Mon 9/1, 11:00 a.m. with Salesforce counsel.
- *Marketing Calendar* → Reviewed draft with **BlueSky Creative** (Wed 8/27). Two Q4 ad concepts slipped; revised deadline Tue 9/2.
- *Doctor's Appointment* → Confirmed annual physical at **Mass General** for Fri 8/29, 8:30 a.m.; transportation booked.
- *Family Travel* → Booked flights for Lee family long weekend in Aspen (depart Sat 8/30, return Mon 9/1). Secured SUV rental and childcare coverage for Sunday dinner.
- *House Maintenance* → Coordinated HVAC service at Beacon Hill home on Thu 8/28, 1:00 p.m. Completed and invoiced.

**Moved (with reasons)**

- Salesforce contract → Pending legal review; moved to Sept 3.

**Learnings**

- Legal reviews: build in 3+ business days buffer.
- Creative vendor under-scoped time estimates—tighten upfront resourcing.
- Family travel planning worked smoothly by confirming childcare earlier in week—worth repeating.

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# Plan: Week of Sept 1–5

**Top Priorities**

- Finalize Salesforce contract by Wed 9/3.
- Deliver final board memo to directors by Fri 9/5, 12:00 p.m.
- Launch Q4 hiring search: post roles on LinkedIn (Tue 9/2), begin outreach via Greenhouse (Wed 9/3).
- Lock hotel block at **The Whitby, NYC** for Investor Day (Oct 14–16) by Thu 9/4.
- Confirm dinner reservation at **Oleana, Cambridge** for Sat 9/6 (party of six, private dining).
- Renew club membership at **Equinox Dartmouth** by Wed 9/3.
- Prepare birthday gifts for Sarah's father: shortlist options from Hermès by Tue 9/2.

**Dependencies / Needs Input**

- Confirm which **two of three candidates** (Lee, Patel, Nguyen) to prioritize for interviews.
- Approve **NYC Investor Day travel dates** (Oct 14–16).
- Select final birthday gift option (watch, briefcase, or cufflinks).

## Executive Action Items

- Review: Draft Board Memo v1 (sent Thu 8/28).
- Decide: Candidate shortlist by Mon 9/1, 9:00 a.m.
- Approve: NYC Investor Day travel dates by Mon 9/1, 9:00 a.m.
- Choose: Father's birthday gift by Tue 9/2.

---

### Quick Reference

- **Sent by XP:** Fri 8/29, 3:00 p.m.
- **Exec review due:** Mon 9/1, 9:00 a.m.
- **Cycle:** Retro → Plan → Feedback → Execute

# Weekly Activities Report (WAR)

**Executive:** [Name]
**Assistant:** [Name]
**Week Ending:** [Friday, Date]

---

## Retro: Week of [Dates]

**Planned vs. Done**

- [Task 1] → [Status + Outcome + Day/Time + Details]
- [Task 2] → [Status + Outcome + Day/Time + Details]
- [Task 3] → [Status + Outcome + Day/Time + Details]

**Moved (with reasons)**

- [Task] → [Reason + new target date]

**Learnings**

- [Observation #1]
- [Observation #2]

---

## Plan: Week of [Dates]

**Top Priorities**

- [Priority #1: deliverable + due date + specific milestone]
- [Priority #2: deliverable + due date + specific milestone]
- [Priority #3: deliverable + due date + specific milestone]

**Dependencies / Needs Input**

- [Decision/approval required + deadline for input]
- [Open question awaiting executive direction]

---

## Executive Action Items

- Review: [Document / deck / contract name]
- Decide: [Which candidate to prioritize, travel dates to approve, etc.]
- Approve: [Budget / timeline / vendor selection]

---

### Quick Reference

- **Sent by XP:** Every Friday, 3 p.m.
- **Reviewed by Exec:** By Monday, 9 a.m.
- **Cycle:** Retro → Plan → Feedback → Execute

# Slide Deck: *How to Build Trust*

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### Slide 1 — A Lesson from Education

- Classic experiment: teachers told 20% of students were “gifted” (randomly).
- By year’s end, those students outperformed their peers.
- Why? Teachers trusted them more → expected more → got more.

**Callout:** *Trust changes outcomes.*
**Speaker Note:** “The same dynamic applies in executive partnerships.”

---

## Slide 2: The Horse Race Method

**Purpose:** Build trust by making invisible decision logic visible.

**Steps:**

1. Set the track → define task.
2. Start the race → both complete task.
3. Compare results → surface trade-offs.
4. Give feedback → teach the *why*.
5. Refine + repeat.
   **Visual:** Racetrack with three laps.
   **Speaker Note:** “This compresses years of learning into weeks.”

## Slide 3 — Horse Race in Practice

- **Round 1 (Day Trip):** Cost vs time trade-off.
- **Round 2 (International):** Comfort vs efficiency.
  **Round 3 (Multi-City):** Business + leisure nuance.
  **Callout:** *“Within 2–3 races, Executive Partners anticipate like the exec.”*
  **Speaker Note:** “It’s not about speed. It’s about shared reasoning.”

## Slide 4 — Weekly Activities Report (WAR)

**Purpose:** Replace drift with rhythm.
**Structure:**

- **Retro:** Planned vs Done, Moved, Learnings.
- **Plan:** Priorities, Dependencies, Decisions Needed.
  **Cadence:** Friday 3 p.m. → Monday 9 a.m. review.
  **Cycle:** Retro → Plan → Feedback → Execute.
  **Speaker Note:** “Consistency builds reliability.”

## Slide 5 — WAR Worked Example

**Retro:**

- Investor meetings: 2 confirmed, 1 rescheduled.
- Board memo: 14-page draft delivered.
- Vendor contract: delayed—legal.

**Plan:**

- Finalize Salesforce contract.
- Deliver board memo.
- Launch Q4 hiring.
  **Needs Input:** Candidate shortlist, travel approval, gift decision.
  **Speaker Note:** "One page, zero surprises."

---

### Slide 6 — Pro Tips + Closing

**Pro Tips:**

- Start small → one live task.
- Codify preferences → capture patterns in SOPs.
- Protect cadence → never skip WAR. Try one horse race per week.
  **Closing Visual:** Executive + XP silhouettes linked by gears.
  **Tagline:** *Trust is leverage. Buy back hours. Sharpen focus. Restore momentum.*
  **Speaker Note:** "When trust compounds, time comes back, focus sharpens, and momentum returns."

In a world where leaders are expected to operate at speed, trust is no longer a soft virtue. It is a strategic asset. High-trust partnerships deliver:

- **Time:** 10–15 hours per week returned to the executive.
- **Focus:** Energy reclaimed for the few decisions only the leader can make.
- **Leverage:** XPs operating at the executive's level, compounding value across various domains.

Listen to this tab

# The Trust Playbook

This playbook contains two distinct, powerful methods for systematically building trust, turning trust from an abstract idea into a concrete practice. Start with whichever method addresses the area you want to improve first.

- **The Horse Race**: a simple, visual way to delegate decisions while keeping quality high. It builds judgment and autonomy fast.

- **The Weekly Activities Report** (WAR): a crisp, five-minute rhythm that keeps you aligned without micromanagement—trust tracked, not assumed.

---

## The Horse Race Method

**Purpose:** To quickly transfer the Executive's implicit decision-making logic to the XP so they can anticipate preferences and make aligned decisions independently.

**Procedure:**

| Step-by-step | Actions |
|---|---|
| 1. **Set the Track (Executive)** | Choose a recurring, high-context task (e.g., booking travel, meeting prep). Define the parameters and the desired outcome clearly. |
| 2. **Set the Track (Executive) Start the Race (Both)** | The Executive and XP complete the task independently. It's highly recommended that both record their screen (using Loom/Zoom) to capture their process. |
| 3. **Compare Results (Together)** | Review both the final outputs and the screen recordings side-by-side in a debrief meeting. |
| 4. **Give Feedback & Debrief (Executive & XP)** | Discuss the trade-offs and choices made.<br>**Executive should explain their "why":** "I chose the more expensive flight because it landed at 2 PM, allowing for a pre-dinner meeting. That time is worth more than the $200 savings."<br>**XP should ask clarifying questions:** "I see, so the hierarchy is Time > Cost for flights, but maybe Cost > Convenience for hotels?" |
| 5. **Refine & Codify (XP)** | After the debrief, the XP should update or create an SOP/preferences document with the newly learned logic. |
| 6. **Repeat** | Run 2-3 races on different tasks until the XP's outputs converge with the Executive's preferences. |

**Worked Example:**

**Scenario:** An executive and their XP run a "horse race" to book a business trip.

| |
|---|
| **1. Set the Track (The Task)**<br>● Executive: "*Let's run a race on this. Please book a nonstop flight to San Francisco for a Tuesday afternoon departure and a Thursday evening return. My preference is an aisle seat and a hotel within walking distance of the convention center.*" |
| **2. Compare Results (The Outputs)**<br>● The XP and Executive review the two itineraries side-by-side.<br>○ XP's Itinerary: Found a flight that was $200 cheaper, but the hotel chosen is a 20-minute walk from the venue. Total time spent: 60 minutes.<br>○ Executive's Itinerary: The flight is more expensive, but the hotel is directly across the street from the venue and has a 24-hour gym. Total time spent: 10 minutes. |
| **3. Debrief & Give Feedback (The 'Why')**<br>● Executive: "*The $200 flight savings is great, but the 20-minute walk from the hotel you chose impacts my schedule and energy. My time is valuable, and that's how I think about the ROI of your time as well.*"<br>● Executive: "*I also always pick hotels with 24-hour gyms for jet lag workouts. That's a non-negotiable for me, which is why I chose mine. However, I prefer the 2 PM flight you found because it allows me to finish a morning meeting before heading to the airport.*" |
| **4. Refine & Codify (The Learning)**<br>● XP: "*Okay, I understand. For future travel, the logic is: 1) Hotel must have a 24-hour gym and be as close to the venue as possible, even if it's more expensive. 2) Flight departure times should protect morning meetings. I'll add this to your travel preferences SOP.*" |

---

## Method 2: The Weekly Activities Report (WAR)

**Purpose:** To create a consistent rhythm of communication and accountability that eliminates surprises, surfaces bottlenecks early, and ensures alignment on weekly priorities.

**Procedure:**

| Step-by-step | Actions |
|---|---|
| **1. XP Drafts the WAR** | Every Friday by 3:00 PM, the XP will draft a one-page report using the template below and send it to the Executive. |

| | |
|---|---|
| 2. **Executive Reviews & Provides Feedback** | The Executive will review the WAR and provide feedback, approvals, and decisions by Monday at 9:00 AM. This closes the loop and sets the direction for the week. |

---

**Worked Example:**

**From:** Daniel Cruz (XP)
**To:** Sarah Lee (Executive)
**Date:** Friday, August 29, 2025, 3:00 PM
**Subject:** WAR for w/e 8/29 & Plan for w/c 9/1

---

Part 1: Retro (Week of Aug 25-29)

- **Planned vs. Done:**
  - **Investor Meetings:** Secured 3 meetings. Sequoia and Index were completed. Tiger Global requested to shift to Sep 10, which I've confirmed.
  - **Board Memo:** 14-page draft was completed and circulated to finance/strategy leads on Thursday. It's now in your inbox awaiting your review.
  - **Salesforce Contract:** This slipped from its target sign-off date of Tuesday. Legal flagged an indemnity clause. I have proactively scheduled a follow-up call with Salesforce counsel for this coming Monday at 11 a.m. to resolve it.
- **Key Learnings:**
  - Legal reviews are consistently taking 3+ business days. I recommend we build this buffer into future contract timelines.
  - Our creative vendor under-scoped their design hours. For the next SOW, I'll ask for firmer estimates upfront.

---

Part 2: Plan (Week of Sept 1-5)

- **Top Priorities:**

    - Finalize Salesforce vendor contract by Wednesday, 9/3.
    - Deliver final board memo to directors by Friday, 9/5, at 12:00 p.m..
    - Launch Q4 hiring search: Post roles on LinkedIn (Tue 9/2) and start outreach (Wed 9/3).
- **Dependencies / Needs Input From You:**
    - To launch the hiring search, please confirm which two of the three marketing director candidates (Lee, Patel, Nguyen) we should prioritize for first-round interviews.
      **Need by Monday 9 AM**.
    - I need your approval on the NYC Investor Day travel dates (Oct 14-16) so I can lock in the hotel block at the preferred rate.
      **Need by Monday 9 AM**.

---

# Mastery - Delegating with clarity

# Athena | Executive Training Session

## How to delegate with clarity

## Slide 1: Intro (2 min)

Why do misunderstandings seem to happen so often? Let's use 2 client stories to see why.

**Client 1:** We'll start with Rebecca. Rebecca is the founder of a wellness startup. She asked her XP, Luis, "Can you post this announcement to LinkedIn?"

The announcement was a paragraph about a new product launch, already drafted by Rebecca. Luis cleaned up the formatting, made sure the links worked, and posted it right away.

After a few days, Rebecca checked the post and frowned. She fired off an email to Luis. "This isn't getting much traction," she said. "I thought we'd get more engagement. Did you tag the investors? Find a teaser image? What about timing it for peak visibility?"

Rebecca revised the post on her own before giving Luis a chance to respond.

Luis' response was apologetic. He thanked Rebecca for the feedback and said he will do his best to avoid these mistakes in the future.

Privately, he wondered where he went wrong. He executed the task perfectly: post a well-worded post to LinkedIn.

**What went wrong?** Rebecca, who asked her XP to finalize a LinkedIn post was frustrated because what she really wanted was to achieve a goal: drive excitement, visibility, and engagement for the launch.

What she actually did was delegate a task: Post this to LinkedIn.

She wanted a goal but delegated a task.

**Client 2:** Our second story comes from Bryan, co-founder of a B2B SaaS company. He was a month away from a major product launch when he turned to his XP, Jess, and said, "Can you make sure the launch is a success?"

Jess nodded, eager to help, and got to work.

She threw herself into the project. She created a checklist, booked a team lunch for launch day, double-checked calendar invites for the engineering sprint review, updated the internal wiki with past launch notes, and emailed the office manager to restock snacks for the launch watch party. She also skimmed the product roadmap and made a few notes about bugs, in case this was helpful for the team.

When Bryan circled back three days before the launch, he was frustrated beyond belief.

“Why are we behind on customer outreach? This is the most important part!”

Jess was confused—“I thought this was about logistics,” she said.

**What went wrong?** The XP did a lot of work: Checklists, calendar invites, reviews, sprints.

What she didn’t do—because Bryan never mentioned it—was draft or send the customer launch email, or coordinate with marketing on the press release.

Bryan had assumed she’d know what mattered most, but Jess was never trained to generate a launch comms plan from scratch.

She had good intentions, skills, and motivation, but no framework for prioritizing what would actually make the launch “a success.”

Bryan wanted a task but delegated a goal.

**How to solve?** In both cases, the problems would have been avoided with 5 simple words: “Repeat it back to me.”

# Slide II. Framework: Four Pillars of Delegating With Clarity (8 min)

Pillar 1: What (“Do X”)
Pillar 2: What For (“To achieve Y”)
Pillar 3: Why (“We need this because of Z”)
Pillar 4: Repeat It Back (“Repeat back what you’ve heard from me”)

# Slide III. 4 Pillar Playbook (7 min)

# Responsibilities

- **You**: Clearly communicate using the 4-Pillar framework.
- **EA**: Listen, repeat back, execute.

# Procedure

### 1. What (Do X)

- **Steps**:

    - State the task or objective explicitly (e.g., "Schedule a meeting with the marketing team").
    - Provide relevant details, deadlines, tools, and requirements (e.g., "Use Google Calendar and set it for next week on a free morning").
- **Example**: "Prepare a presentation for the Q3 sales review by Friday."

### 2. What For (To Achieve Y)

- **Steps**:
    - Describe the purpose of the task and what success looks like (e.g., "To ensure the team is aligned on sales targets").
    - Link the task to a broader objective, if applicable.
- **Example**: "To achieve Y: To provide the leadership team with clear insights into Q3 performance."

### 3. Why (Because of Z)

- **Steps**:
    - Explain why the task is necessary, including any relevant background or priorities (e.g., "We need this because the board requested a detailed review").
    - Highlight how urgent/important or non-urgent / non-important it is
- **Example**: "Because of Z: We need this because the board is evaluating our sales strategy for next quarter."

### 4. Repeat It Back (Tell Me What You Heard)

- **Steps**:
    - Ask the EA to restate the task, goal, and reasoning in their own words (e.g., "Can you repeat back what I've asked you to do?").
    - Listen actively and clarify any discrepancies or misunderstandings.
    - Confirm agreement before proceeding (e.g., "That's correct, please go ahead").
- **Example**: "Tell me what you heard."

## Example: Schedule a client dinner

**Task**: Schedule a client dinner.

- **What**: "Book a dinner reservation for 6 people at an Italian restaurant for next Thursday at 7 PM."
- **What For**: "To build stronger relationships with the client for our upcoming project."
- **Why**: "Because the client requested a face-to-face meeting to discuss contract terms."
- **Repeat**: "Please repeat back what I've asked you to do, why it's important, and the goal."

**EA Response**: "I'll book a dinner for 6 at an Italian restaurant for Thursday at 7 PM to strengthen our client relationship because they want to discuss contract terms. Is that correct?"
**Delegator Confirmation**: "Yes, that's correct. Please proceed."

Time unlocked: **1 hour/week for each task delegated clearly saved by avoiding confusion and mistakes**

## Slide IV. Live Exercise (7 min)

- **Prompt:** Each participant picks one live task they want to delegate to XP
- **Exercise:** (1) In pairs with their Executive Partner (or peer if solo), they run through the 4-Pillar SOP (What, What For, Why, Repeat It Back).
- **Share back:** 2–3 volunteers present their delegation framing.

## V. Commitment Capture (3 min)

- **Ask:** "Send email to EA asking them to hold you accountable for using the 4-Pillar framework starting now"
- **Action:** Each participant writes down email to EA asking them to start using the 4-Pillar framework and hold each other accountable for using it in all delegations
- **Follow-up:** Executive Partner tracks whether 4-Pillars framework has been used in all delegations in the following 2 weeks

---

## Time Allocation

- Hook & Case for Change: **2 min**
- Framework: **8 min**
- Playbook (SOP): **7 min**
- Live Exercise: **7 min**
- Commitment Capture: **3 min**

# Athena | Executive Playbook

## Delegating With Clarity

### The Cost of Misunderstanding

Even the sharpest executives lose hours each week to a surprisingly basic failure: unclear delegation.

Consider two recent client stories.

**Rebecca, founder of a wellness startup**, asked her EA, Luis, “Can you post this announcement to LinkedIn?”
Luis did exactly that—cleaned the formatting, checked the links, posted promptly. Task executed flawlessly.

But Rebecca was frustrated days later. Engagement was low. No investors tagged, no teaser image, no peak-time posting. In her mind, Luis had missed the point. She wanted visibility and excitement. What she actually delegated was: *Post this to LinkedIn.*

She wanted a **goal** but delegated a **task**.

---

**Bryan, co-founder of a SaaS company**, was weeks away from a product launch. He told his EA, Jess: “Make sure the launch is a success.”

Jess threw herself into logistics—calendars, checklists, team lunch, bug tracking, even office snacks. But she missed the core: customer outreach and press coordination. Bryan never mentioned it.

He wanted a **task** but delegated a **goal**.

---

Both executives were left frustrated. Both Executive Partners felt they had done good work. Neither partnership had a clear definition of “what good looks like.”

The fix? Five simple words: **“Repeat it back to me.”**

---

# The Four Pillars of Clarity

Delegation breaks down not because of bad intentions, but because of gaps in framing. The cure is a disciplined, four-part framework:

1. **What (Do X)**
   *State the task clearly.*
   Example: “Book a dinner reservation for six people at an Italian restaurant next Thursday at 7 p.m.”

2. **What For (To Achieve Y)**
   *Describe the goal or outcome.*
   Example: “To build stronger relationships with the client for our upcoming project.”

3. **Why (Because of Z)**
   *Give context and urgency.*
   Example: “Because the client requested a face-to-face meeting to discuss contract terms.”

4. **Repeat It Back**
   *Ask your Executive Partner to restate what they heard.*
   Example: “I’ll book a dinner for six at an Italian restaurant next Thursday at 7 p.m. to strengthen our client relationship because they want to discuss contract terms. Is that correct?”

These four steps transform delegation from guesswork into alignment.

---

### Sidebar: The Gap Analysis

- **Task without Goal** → Work done, outcome missed.
- **Goal without Task** → Energy expended, priorities misplaced.
- **Task + Goal + Why + Repeat** → Alignment secured, trust compounded.

---

# Playbook: 4 Pillars

#### Responsibilities

- **Executive:** Communicate using the Four Pillars.
- **Executive Partner:** Listen, repeat back, execute.

#### Procedure

1. **What (Do X)**
   - Explicit task with details, deadlines, tools.
   - *Example:* “Prepare a presentation for the Q3 sales review by Friday.”

2. **What For (To Achieve Y)**

- Define success.
- *Example:* “To ensure the team is aligned on sales targets.”

3. **Why (Because of Z)**

    - Give background, urgency, or strategic purpose.
    - *Example:* “Because the board is evaluating our sales strategy for next quarter.”

4. **Repeat It Back**

    - EA restates the task, goal, and reasoning.
    - Executive confirms alignment before execution.

**Worked Example**
Task: Schedule a client dinner.

- What: “Book a dinner for six people at an Italian restaurant next Thursday at 7 p.m.”
- What For: “To strengthen our client relationship before contract negotiations.”
- Why: “Because the client requested a face-to-face meeting.”
- Repeat: “Book dinner for six next Thursday at 7 p.m., Italian restaurant, to strengthen ties because they want to discuss contract terms. Correct?”
- Confirmation: “Yes. Proceed.”

**Impact:** One clear cycle saves ~1 hour per task by eliminating rework and confusion. Multiply by dozens of tasks each week, and the ROI is extraordinary.

---

# The Live Exercise

Theory only sticks when practiced. In Athena sessions, executives run a live test:

1. Pick a task you want to delegate now.
2. Run it through the Four Pillars with your EA (or peer).
3. Share back with the group.

The shift is immediate. Executives realize how often they skip context. Executive Partners appreciate how clarity makes them more effective. Misalignment evaporates.

---

# Commitment Capture

The final step: accountability.

- **Action:** Each executive emails their EA:
  *"Hold me accountable for using the Four Pillar framework in every delegation."*
- **Follow-up:** For two weeks, Executive Partners track whether delegations meet the Four Pillars.

The result is not just clarity, but cultural reinforcement. Delegation quality rises. Trust compounds. Both sides level up.

---

## Why This Matters

The difference between a mediocre and a world-class partnership is rarely effort. It is clarity.

- **With clarity:** Tasks align to goals, Executive Partners anticipate, and trust deepens.
- **Without clarity:** Effort misfires, frustration grows, and trust erodes.

Executives who master the Four Pillars don't just avoid mistakes—they multiply leverage.

---

## Final Word

Delegation is not about giving orders. It's about **defining what good looks like**. The Four Pillars make it teachable, repeatable, and scalable.

The payoff is not just hours back, but alignment, trust, and momentum.

As one Athena client put it:

> *"Once we started using the Four Pillars, I never had to redo work. I got back hours every week, and my EA started running two steps ahead."*

Listen to this tab

# Delegating with Clarity Playbook

This playbook is designed for an Executive to review and implement with their Executive Partner (XP) after attending the live Mastery Session.

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## The Problem: The High Cost of Misunderstanding

Even the best partnerships lose hours each week to unclear delegation. This happens when one person delegates a task (e.g., "Post this to LinkedIn") but expects a goal to be met *(e.g., "Drive high engagement for our launch").* Or, when they delegate a goal *("Make the launch a success")* but have specific tasks in mind that are never stated. This leads to wasted effort, frustration, and erodes trust.

---

## The Solution: The Four Pillars of Clarity

To eliminate these gaps, we use a simple but powerful four-part framework for every delegation. This framework ensures that both the "what" and the "why" are always clear.

- **Pillar 1: What (Do X)**: State the task explicitly, including details, deadlines, and tools.
- **Pillar 2: What For (To Achieve Y)**: Describe the desired outcome and what success looks like.
- **Pillar 3: Why (Because of Z)**: Explain the context, priority, and strategic importance.
- **Pillar 4: Repeat It Back**: Confirm understanding by restating the request.

| Gap Analysis | Result |
|---|---|
| **Task without Goal** | Work is done, but the outcome is missed. |
| **Goal without Task** | Energy is expended, but priorities are misplaced. |
| **Task + Goal + Why + Repeat** | Alignment is secured, and trust is compounded. |

**Worked Example:**

| Role | Ineffective Delegation & Proactive XP Response | Effective (Four Pillars) Delegation & XP Confirmation |
|---|---|---|

| | | |
|---|---|---|
| **Executive** | **"***Hey, can you book a dinner for me with the client next week?" (This leaves the XP to guess the number of people, cuisine, purpose, and urgency.)* | *"Please book a dinner reservation for 6 people at an Italian restaurant for next Thursday at 7 PM (What), to build stronger relationships with the client for our upcoming project (What For), because they requested a face-to-face meeting to discuss contract terms (Why). Can you repeat that back to me?"* |
| **Executive Partner** | ***(Proactively asking using the Four Pillars to clarify****):*<br>*"Happy to. To make sure I get it right: (For the 'What') How many people total? Is there a preferred day, time, or location? (For the 'What For') What's the main goal of this dinner? Is it a casual relationship-builder or are you planning to close the deal? (For the 'Why') Just so I can prioritize, how urgent is it to get this on the calendar?"* | ***Confirmation & Follow-up:***<br>*"Got it. I'll book a dinner for 6 at an Italian restaurant for next Thursday at 7 PM. The goal is to strengthen the client relationship before you discuss contract terms. Is that correct?"*<br><br>***(Optional question showing initiative):*** *"Should I prioritize restaurants with a private room in case the conversation gets detailed?"* |

## Standard Operating Procedure (SOP)

This is how we put the Four Pillars into practice for every delegation.

| Role | Responsibilities |
|---|---|
| **Executive** | Clearly communicate using the Four Pillar framework for every delegation. |
| **Executive Partner** | Actively listen for all four pillars. Proactively **"repeat back"** to confirm understanding, even if not prompted. Execute with clarity. |

| Step-by-step | Actions |
|---|---|
| **1. Executive Communicates** | **What:** "*Prepare a presentation for the Q3 sales review by Friday.*"<br>**What For:** "*To provide the leadership team with clear insights into our Q3 performance.*"<br>**Why:** "*Because the board is evaluating our sales strategy for next quarter, so this data is critical.*" |

| | |
|---|---|
| **2. Executive Partner Confirms** | **Repeat It Back:** The assistant asks to clarify or states their understanding. "*Okay, so I will prepare the Q3 sales review presentation, due Friday. The goal is to give leadership clear performance insights because the board needs it to evaluate next quarter's strategy. Is that correct?*" |
| **3. Executive Validates** | **Confirmation:** The executive listens and confirms alignment before work begins. "Yes, that's correct. Please proceed." |

**Note for the XP: Why "Repeating It Back" is a Power Move**:

Proactively repeating back the What, What For, and Why is more than just a confirmation step. It demonstrates that you are a strategic partner who thinks about outcomes, not just tasks. This habit builds immense trust and positions you as an indispensable part of the team.

## Implementation and Accountability

To make this our new standard:

1. **Action:** The Executive will send an email to their XP to establish this as a shared goal.
   - **Template:** "*Hi [XP Name], I want to improve our delegation process to ensure we're always aligned. Moving forward, I will use the 'What, What For, Why' framework. Please hold me accountable for this. To close the loop, I'd like you to always 'Repeat it Back' to me to confirm you have everything you need. This will help us both move faster and avoid confusion.*"
2. **Follow-up:** For the next two weeks, the Executive Partner will track whether the Four Pillars were used in delegations. This builds a shared habit.

The result is a partnership where clarity eliminates rework, builds trust, and allows the Executive Partner to anticipate needs and operate more strategically.

---

# Mastery - Measuring and Improving Delegation

# Athena | Executive Playbook

## How to measure and improve delegation

# Slide I. Hook (2 min)

We can have all the best intentions and motivation in the world, but they will not be enough to achieve a goal.

Many people set amazing goals but fail to accomplish them. One of the most obvious is probably when people set a new year's resolution to go to the gym more or eat a more healthy diet. Studies show that only 8% of new year's resolutions actually continue past the first month following the new year. Just 6% make it through the entire year.

Why?

As the old saying goes, "what gets measured, gets managed."

The same goes for delegation – measuring and improving are the keys to success.

# Slide II. 3 Tests (8 min)

How should we measure delegation?

We use the 3 tests method:

We measure the intent test (can the EA think like you?), the autonomy test (does the EA act without you?) and feedback loop test (do you learn and fix drift fast?).

# III. The 3 tests SOP (8 mins)

Instructions:

1. **Set Aside 45 Minutes**: Meet with your EA and direct team.
2. **Run the Tests**: Ask the provided questions, letting the EA answer first.
3. **Score and Discuss**: Rate each test (1-5), identify gaps, and plan improvements.
4. **Revisit Quarterly**: Repeat every 90 days to track progress.

**The 3 Tests**

**1. Intent Test: Do they think like you?**

**Purpose**: Ensure your EA aligns with your values and decision-making logic.

**Questions**:

- What values guide my decisions?
- What tradeoffs do I consistently make?
- When did you last act based on what I would have done?

  **Scoring**:

- 1: Needs constant clarification, asks before every step.
- 3: Understands intent but hesitates in ambiguous situations.
- 5: Anticipates your judgment, acts with your logic and values.
  **High Score Unlock**: They act proactively, and you trust their decisions.

**2. Autonomy Test: Do they act without you?**

**Purpose**: Assess if your EA owns decisions independently.
**Questions**:

- What decisions do you make without me?
- What do you still escalate that we could systematize?
- What's a recent decision you made solo?

  **Scoring**:

- 1: Everything waits for your approval.
- 3: Handles routine tasks but pauses on ambiguity.
- 5: Owns entire domains, informing you without involving you.
  **High Score Unlock**: You're no longer the bottleneck.

**3. Feedback Loop Test: Do you fix drift fast?**

**Purpose**: Ensure misalignments are caught and corrected quickly.
**Questions**:

- What's the last misaligned decision, and how did we catch it?
- Do you feel safe flagging unclear intent?
- How do we review and improve decisions?

  **Scoring**:

- 1: Drift lingers, fixes are slow or avoided.
- 3: Misalignments caught but corrections are inconsistent.

- 5: Drift is caught early, fixes are open and frictionless.
  **High Score Unlock**: Feedback sharpens the system, preventing compounded errors.

**Scorecard**

- **Calculate**: Average the scores from the three tests (Intent, Autonomy, Feedback).
- **Interpret**:
  - **5.0**: Judgment scaled; you're free to lead.
  - **4.0–4.9**: Outcomes move; you're nearly hands-off.
  - **3.0–3.9**: Work moves, but judgment still flows through you.
  - **<3.0**: You've only multiplied hands, not delegated.
- **Reflect**: Identify one repeatable behavior to boost the average score by 1 point in 30 days.

**LIVE EXERCISE: Steps to Improve Delegation**

1. **Write a Decision Guide**:
   - List 5 values or principles guiding your decisions.
   - Note 3 frequent tradeoffs (e.g., speed vs. quality).
   - Document 3 past decisions showcasing your thinking.
2. **Delegate One Decision Type**:
   - Choose one area (e.g., calendar priorities, client escalations).
   - Define success, set guardrails, and share past decision patterns.
3. **Weekly Intent Check**:
   - Set a recurring calendar invite Every Friday, review:
     - What decisions were made?
     - Which matched your intent?
     - Where was there drift, and why?
   - Adjust and refine as a habit.

**The 90-Day Challenge**

- Re-run the tests quarterly.
- Track score changes to measure leverage.
- Goal: Scale judgment, not just save time.

**Why It Works**: This framework quickly finds out the current status of delegation on your team. It also provides a scorecard unique to each component of delegation (intent, autonomy, feedback loop).

---

# V. Commitment Capture (3 min)

- **Ask:** “Ask EA to set up review meetings and highlight the relevant metrics we have created so that we can start track ASAP.”
- **Action:** Each participant tells the EA or writes email to EA asking them to begin / continue the SOP
- **Follow-up:** Executive Partner tracks when changes have been implemented and their effects. Executive Partner schedules the next review of this SOP in the following quarter.

# Mastery - Safe Space for Learning From Mistakes

# Athena | Executive Playbook

## How to create a safe space to learn

*(30 minutes | Executive + Executive Partner)*

---

## I. Hook (2 min) CHANGE TO FOCUS ON FUTURE

Let's start with two clients who stumbled upon a winning formula for today's topic, totally unintentionally.

1. Jen and Marcus (not real names) were a married couple who co-founded a boutique architecture firm. Jen was the design visionary. Marcus was the operations lead. Together, they hired an EA named Emily (not real name) to support them both.

At first, Emily found it... confusing.

2. Jen would say things like, "No pressure if you don't have time," and "You're doing great, even if this week's been rough." She'd leave handwritten notes with smiley faces. When Emily forgot to confirm an important client walkthrough, Jen brushed it off: "Don't worry—we've all been there."

When Emily sent a client email with some awkward phrasing, Jen didn't edit it or mention the mistake. Instead, she **re-sent the email herself**, worded more carefully, and CC'd Emily—then privately texted her, "Yours was great! Just wanted to offer an alternate tone in case it's ever helpful 💛"

3. Marcus, meanwhile, was all about standards. He'd reply to late updates with timestamps: "This was due at 4:00. You sent it at 4:36." He kept a whiteboard checklist titled "No Slip-Ups."

Every Monday, Marcus sent Emily a spreadsheet labeled **"Week in Review – Timestamp Log."** It included a line-by-line list of her deliverables with exact submission times compared to expected deadlines. Even if something was delivered at 9:58 when the deadline was 10:00, he'd mark it "✅ On time." But at 10:01? "⚠️ Missed."

Emily was dealing with these two opposites. Individually neither approach worked. With Jen, Emily felt safe but unchallenged. With Marcus, she felt scrutinized and anxious.

But together -- something unexpected happened. Emily actually flourished. Marcus' deadlines and discipline set the bar for her, and Jen's safety allowed her to make mistakes that inevitably happened as Emily navigated through Marcus' exacting demands.

Emily started owning more client coordination, even proactively tightening timelines before Marcus had to ask. She began to feel OK admitting to mistakes because she knew she could rely on Jen to help her through them.

For her one-year anniversary, Jen sent her flowers. Marcus sent her a bullet-pointed performance summary with the subject line: “Emily: Steady Climb.”

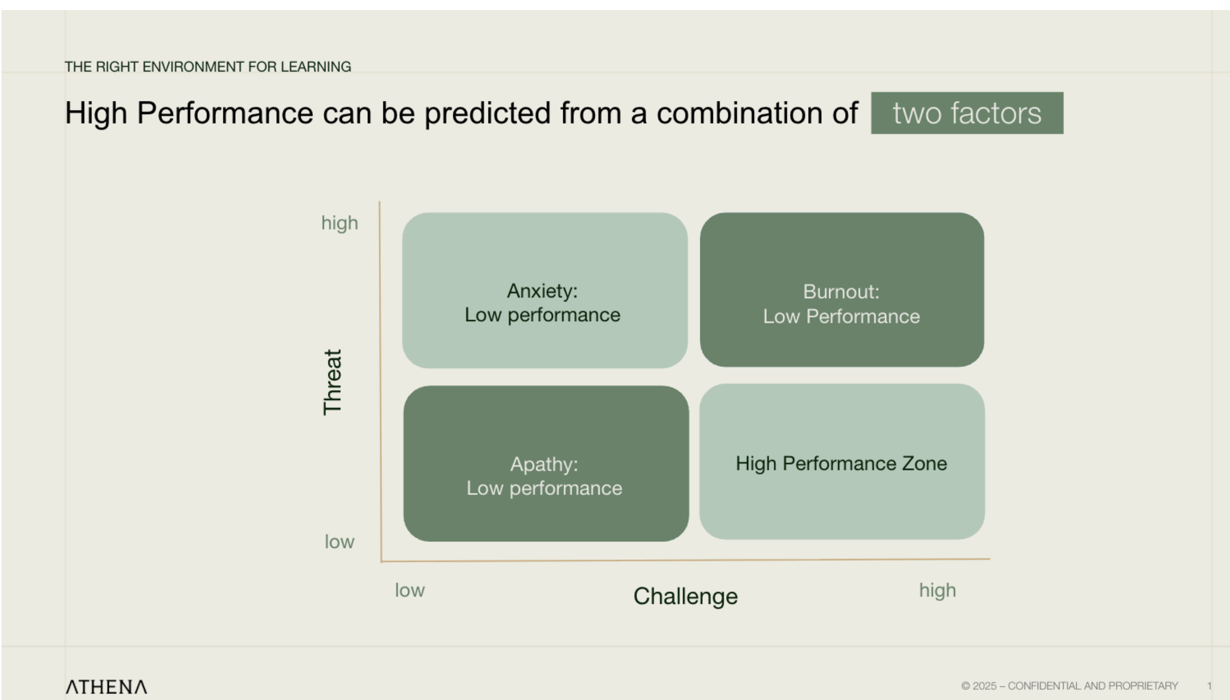
Let’s understand why Marcus and Jen stumbled on a winning combination

- In research on teams, researchers have found that learning and improvement can be predicted from a combination of two factors:
- The sense of low threat == the sense that the EA can strive for great work while using mistakes as a platform for learning and improvement
- The sense of high challenge == the sense that the EA is held to high expectations and standards for performance
- We have the following balance between these two factors: Low threat + high challenge

---

## II. Framework: Low Threat + High Challenge = Stellar Performance (8 min)

We want a balance of low threat and high challenge for our EA:




**Low Threat + Low Challenge → Apathy Zone**

1. EA is neither supported nor expected to contribute meaningfully.

2. Low energy, low ownership

**High Threat + High Challenge → Burnout**

1. EA is not supported and has high expectations put on them
2. Might feel positive and energizing at first, but unsustainable as it creates burnout over time

**High Threat + Low Challenge → Anxiety Zone**

- EA is pushed to perform but fears judgment or punishment.
- Results in silence, stress, and defensive behavior—EA plays it safe.

**Low Threat + High Challenge → High-Performance Zone**

- EA is supported and is expected to deliver.
- Encourages thoughtful expansion into new tasks, feedback, and ownership.

---

# III. Focus on the Future: Achieving the Winning Balance of Low Threat + High Challenge SOP  (8 mins)

1. **Focus on a task you need to give feedback on**:
    - Review the recent tasks you delegated and identify one that your EA can use your feedback on
2. **Give feedback with a focus on the future**:
    - Identify the areas in the EA's performance that require improvement
    - Begin your feedback with: "In the future, we'll want not to do X and instead do Y" , replacing X with the EA's mistakes and replacing Y with the right course of action
3. **Ensure understanding:** Say "repeat it back to me" or "summarize to me what you understood"

---

# IV. Live Exercise (7 min)

- **Prompt:** Each participant picks a task (i.e. email inbox management, calendar management, etc.) and discusses an area for improvement with their EA. Each participant practices giving feedback to the EA that balances low threat and high challenge by focusing on the future. EA evaluates whether the participants was able to achieve this balance.

- **Exercise:** In pairs with their Executive Partner role-playing peer if solo.
- **Share back:** 2–3 volunteers present their delegation framing.

---

## V. Commitment Capture (3 min)

- **Ask:** “Ask EA begin setting up the SOP described above”
- **Action:** Each participant tells the EA or writes email to EA asking them to begin the SOP
- **Follow-up:** Executive Partner tracks the feedback you give over time, and provides their own assessment of the balance between safety and accountability and shows to you. Periodically, you and the EA review whether adjustments should be made.

# Mastery - Balancing Control and Autonomy

# Athena | Executive Playbook

## How to balance control and autonomy

# I. Hook (2 min)

One of our clients launched a micro-investing app and hired a new EA to manage schedules and investor relations. Initially, our client was all-in command-and-control style—dictating email wording and slide deck formats, micromanaging everything. This stifled his XP, leading to uninspired work and small errors like a misfiled report.

After attending a coaching session with us, the client shifted to trust-and-teach, giving the XP autonomy to meet clear goals while offering weekly “teach-ins” for feedback.The arrangement saved our client a ton of time because the XP was fully capable of helping the client with emails and other invitations to connect.

**Why It Worked**: Our client’s shift between trust-and-teach (empowering the EA creativity) and command-and-control (oversight for critical tasks) drove performance and averted mistakes.

# II. Framework: Shifting Gears between Trust & Teach vs. Command & Control (8 min)

We have to balance control and autonomy when we delegate.

We have two gears:

(1) Trust & Teach – generally characterized by autonomy that we give our EA to do his/her work
(2) Command & Control – generally characterized by us taking over

By default, we should be in Gear #1 – trust & teach.

You delegate tasks to your EA and trust him/her to accomplish these tasks. You provide periodic feedback and assess progress, but otherwise don’t step in and take control. In the long-run, this is the best way to reclaim your time and make delegation work for you.

However, if the EA is struggling on a time-sensitive or important task, then you need to switch gears to command & control, and take over.

The best way to do this is to tell your EA to ask you take back control when the EA feels that they’re struggling and need your help.

That way, you don’t have to spend the time and attention to monitor everything – the EA will have a better understanding from the ground for when you should step in.

# III. Playbook: Trust & Teach SOP for Calendar and Inbox Management (7 min)

### Step 1: Setup (One-Time)

1. **Recap the Framework with EA**:
   - **Gear 1 (Trust & Teach)**: EA handles tasks independently; you provide feedback via weekly check-ins.
   - **Gear 2 (Command & Control)**: You take over temporarily; triggered by EA's signal.
2. **Establish Signaling Mechanism**: Agree on how the EA signals for Gear 2 (e.g., Slack message: "Switching to Gear 2 on [task] – need your input"; or email flag: "Urgent: Gear 2 Request").

### Step 2: Gear 1: Trust & Teach – Default Mode

1. **Delegate Tasks**: Assign calendar and inbox responsibilities via a shared task list or email (e.g., "Manage my inbox starting today: triage, draft responses for approval on non-routine items, schedule routine meetings").
2. **Empower Autonomy**: Allow the EA to make decisions within guidelines (e.g., reschedule low-priority meetings, respond to standard inquiries).
3. **Provide Feedback**: Hold brief weekly reviews (15-30 minutes) to discuss progress, successes, and areas for improvement.

### Step 3: Switching Gears (Gear 2: Command & Control – Exception Mode)

1. **Trigger**: EA self-assesses for struggles, such as:
   - Time-sensitive tasks (e.g., urgent meeting rescheduling with a key client).
   - High-importance items (e.g., sensitive email involving contracts or disputes).
   - Uncertainty (e.g., conflicting priorities or unclear instructions).
2. **EA Signals Switch**: EA notifies you immediately via agreed mechanism (e.g., "need your direction Q3 earnings call scheduling – potential conflict with board meeting").
3. **You Take Over**:
   - Assume control (e.g., resolve the issue directly).
   - Limit intervention to the specific task; avoid blanket takeover.
4. **Resolve and Debrief**:
   - Debrief with EA (e.g., "Here's why I prioritized X – let's align on this for next time").
   - Switch back to Gear 1 once resolved.

---

# IV. Live Exercise (7 min)

- **Prompt:** Each participant starts the Trust & Teach and Command & Control SOP, preferably with their EA

- **Exercise:** (1) In pairs with their Executive Partner (or peer if solo), they run through the SOP
- **Share back:** 2–3 volunteers present their delegation framing.

---

# V. Commitment Capture (3 min)

- **Ask:** “Ask EA to prepare all necessary feedback meetings, logs, and gear-shift triggers so that you can implement the SOP immediately.”
- **Action:** Each participant tells the EA or writes email to EA asking them to begin / continue the SOP
- **Follow-up:** Executive Partner tracks when changes have been implemented and their effects. Executive Partner schedules the next review of this SOP in the following quarter.

# Mastery - Stop Fixing People. Fix the System

# Athena | Executive Playbook

## How to build a delegation system

# I. Hook (2 min)

In early 2005, Linda Brown joined Zappos as a warehouse associate. She was in her early 20s, had just moved out of her apartment in Shepherdsville, Kentucky, and badly needed extra cash for a new rental deposit. A steady paycheck—and the fact that Zappos covered the cost of her four-week training program—felt like a lifeline.

Two weeks in, her manager gathered the trainees in a conference room. After thanking them for their progress, he made an announcement Linda would never forget:

> "You're doing great. But today we have an offer: we'll pay you $2,000 to quit. No questions asked."

The room went silent. Linda looked around. Had she heard that right? $2,000 just to walk away? It was an almost irresistible temptation.

In the end, Linda stayed. So did 97% of her classmates.

Why would Zappos pay people to leave?

Because the company understood a simple truth: To get people to be committed to working there, fix the system. The $2,000 offer was about creating a moment of decision. Those who stayed became more deeply invested in Zappos, not because of prior loyalty, but because of management created a system of commitment.

The results spoke for themselves. In an industry plagued by high turnover, Zappos boasted some of the best retention rates in the business.

**Case for change**: Trying to change your EA is a very difficult way of getting things done. Instead, look first to fix the system that the EA is working under. When you see a gap in their work, ask them: What in the work environment: SOPs, deadlines, feedback loop, tech tools, amount of interruptions, access to resources, etc., is preventing you from doing your best?

Here are 3 proven things that you can do to create an optimal system:

---

# II. Framework: Performance = Capabilities × System (8 min)

To improve the EA's performance and help him or her excel, you have two levers:

(1) Their capabilities – long-term change through training and continuous feedback
(2) The System they work in – quick and potentially impactful change to boost performance without having to wait

Focus first on Lever #2 – it is quicker, easier to shift, and can potentially have a tremendous impact.

## 1. Build Commitment Moments, Not Compliance Systems

**Why it works:**
Behavioral economics research (e.g., *Cialdini, 2009; Ariely, 2010*) shows that when people make an active choice, their sense of ownership increases dramatically. Zappos' $2,000 quit offer was a textbook "commitment device"—it transformed a passive job into an intentional choice.

**How to apply it:**
Create small but visible moments where employees opt in.

- Example: Ask your XP or team to re-commit weekly to their top three priorities, or design a weekly or monthly reporintg to include a "Why I'm here" reflection. Share it publicly, even if just within the team or their family or friends, if possible
- For XPs: At the start of each week/month/quarter, invite them to restate what success looks like in their role and what support they need from you to achieve it.

## 2. Redesign Feedback Loops for Psychological Safety

**Why it works:**
Studies from *Google's Project Aristotle* and *Amy Edmondson's* research on psychological safety show that teams with open, rapid feedback loops outperform those without them. In many executive-assistant systems, gaps in communication are mistaken for competence issues.

**How to apply it:**
Fix the *feedback architecture*:

- Replace ad-hoc corrections with a **weekly calibration ritual** (10-minute "What's working / What's not" sync).
- Use structured prompts such as: "One thing I need more clarity on is…" or "One thing that would make me faster next week is…".
- Research shows these micro-loops reduce rework, boost morale, and improve retention.

### 3. Audit and Simplify the Work Environment

**Why it works:**
The *Job Demands–Resources (JD-R) model* (Bakker & Demerouti, 2007) proves that burnout and underperformance usually stem not from low effort, but from a mismatch between resources and demands. When leaders fix friction points—unclear SOPs, tool overload, constant interruptions—performance rises naturally.

**How to apply it:**

Run a **“friction audit”** every week with your XP:

- Ask: “What’s one recurring obstacle that slows you down or frustrates you?”
- Categorize by type: process, tool, clarity, or bandwidth.
- Eliminate one per week. Even minor changes (simplifying file access, standardizing calendar rules) yield disproportionate gains.

### Takeaway

When you think something’s “a people problem,” assume it’s a system problem until proven otherwise.
Fix the system—through intentional commitment, structured feedback, and friction reduction—and you’ll see both trust and results accelerate.

# V. Commitment Capture (3 min)

- **Ask:** “Ask EA to book 30 mins on your calendar to complete the System Audit and come up with actionable improvements”
- **Action:** Each participant writes down email to EA asking them to begin / continue the System Audit SOP
- **Follow-up:** Assistant tracks when changes have been implemented and their effects. Assistant schedules the next System Audit in the following quarter.

# Weekly Executive–EA System Alignment Template

**Purpose:**
To align priorities, surface friction, and ensure both partners are working from clarity and commitment—not assumption.

---

### 1. Weekly Commitment & “Why I’m Here” Reflection

*(Takes 3 minutes each, done independently before the meeting)*

**Executive:**

- This week, I'm committed to: ______________________________
- Why this matters (my "why"): ______________________________
- What success looks like by Friday: ________________________
- What I need from my EA to achieve this: ___________________

**Executive Partner (XP):**

- This week, I'm committed to: ______________________________
- Why this matters (my "why"): ______________________________
- What success looks like by Friday: ________________________
- What I need from my executive to achieve this: ___________

*(Note: As trust builds, shift to monthly and quarterly commitments.)*

---

## 2. 10-Minute Calibration Ritual

*(Do this together—fast, direct, and without defensiveness)*

**Step 1: What's Working / What's Not**

- What's working well right now?
- What's not working or starting to slip?

**Step 2: Two Quick Prompts**

- One thing I need more clarity on is: ___________________
- One thing that would make me faster next week is: ______

*(Tip: Keep responses short—bullet-style, not paragraphs. Capture follow-ups separately.)*

---

## 3. Weekly Friction Audit

*(Both complete separately, then compare notes—takes 2 minutes)*

**Prompt:**
What's one recurring obstacle that slows you down or frustrates you?

| Category | Description of Friction | Date Logged | Owner | Status |
|---|---|---|---|---|

| | | | | |
|---|---|---|---|---|
| Process | e.g., unclear handoffs between inbox & calendar | 10/07 | XP | Eliminated |
| Tool | e.g., meeting notes scattered across platforms | 10/07 | Exec | In Progress |
| Clarity | e.g., unsure of decision authority on expenses | 10/07 | XP | Open |
| Bandwidth | e.g., too many same-day changes to schedule | 10/07 | Exec | Eliminated |

*(Track on a shared sheet. Each week, eliminate one source of friction. As systems stabilize, move to monthly → quarterly audits.)*

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### 4. Optional Wrap-Up (2 minutes)

- One thing I appreciated this week: ___________________
- One small experiment we'll try next week: ______________

---

### Summary Flow

| Step | Owner | Duration |
|---|---|---|
| Individual reflections (Commitment + Why) | Both | 5 min |
| 10-min sync (Calibrate + Clarity prompts) | Together | 10 min |
| Friction audit + update sheet | Both | 5 min |
| **Total Weekly Time** | | **15–20 minutes** |

# Playbook Essentials Pack

# Executive Summary: The Essentials Playbook Pack

The *Essentials Playbook Pack* eliminates wasted hours in six core areas—Money, Inbox, Calendar, Travel, Events, and Accountability. Each domain has Protocols (guardrails) and SOPs (30-second handoffs), giving executives and XPs a system that is fast, safe, and repeatable.

### The Payoff

- **For Clients:** 30–50+ hours freed each quarter; sharper calendars; no time lost on hold or in checkout flows.
- **For XPs:** Clear authority, faster execution, higher trust.
- **For the Partnership:** Fewer clarifications, smoother handoffs, measurable ROI.

In short: Protocols build trust. SOPs save time. Together, they elevate both the executive and their partner.

## 1. Money: Payments & Purchases

**Protocol: Payments & Purchases**

- Defines what your XP can buy, spending thresholds, and approval rules
- Clarifies tools (credit cards, 1Password, Amazon accounts)
- Sets update preferences (Slack, email, weekly summaries)

**SOP: Payments & Purchases**

- **Impact:** Never type your credit card online again
- **How to Delegate:** Send a link + key details → XP completes checkout
- **Result:** Safe, seamless payments with instant updates

---

## 2. Inbox Management

**Protocol: Inbox Access & Drafting**

- Rules for what the XP can delete, archive, or reply to
- Defines which emails XP drafts vs. which you always handle
- Sets expectations for tone, response time, and urgent flags

**SOP: Inbox Liberation**

- **Impact:** Keep your inbox clear while your voice stays sharp
- **How to Delegate:** Tell XP what needs to happen + tone context
- **Result:** Pre-drafted replies, clean inbox, and only high-value emails in view

---

# 3. Calendar Management

**Protocol: Calendar Priorities**

- Defines meeting must-haves, no-go times, and protection blocks
- Approval rules for new invites (who can auto-book, who needs clearance)
- Rules for rescheduling and cancellations

**SOP: Calendar Management**

- **Impact:** Walk into every meeting knowing it matters
- **How to Delegate:** Tell XP desired outcomes + any exceptions
- **Result:** A calendar that protects your priorities without effort

---

# 4. Travel Management

**Protocol: Travel Bookings & Preferences**

- Sets flight/hotel/car class preferences and loyalty accounts
- Defines spending caps and when to confirm before booking
- Clarifies rebooking/cancellation rules

**SOP: Travel Management**

- **Impact:** Travel without stress—every detail handled
- **How to Delegate:** Say what trip you need + preferences
- **Result:** Itinerary and confirmations appear in your calendar—no stress

---

# 5. Events & RSVPs

**Protocol: Event Attendance & Representation**

- Defines which types of events you auto-RSVP “yes” vs. “no”
- Sets guest policies, plus vs. minus-one rules
- Clarifies communication preferences for invites (Slack summary, weekly digest)

**SOP: Events & RSVPs**

- **Impact:** Never click “RSVP” again
- **How to Delegate:** Forward invite + short note (“yes,” “no,” or “check with me”)
- **Result:** XP manages RSVPs, updates calendar, and confirms details with no effort from you

---

## 6. Accountability & Goals

**Protocol: Accountability Boundaries**

- Defines what goals or habits the XP can track
- Sets cadence (daily, weekly, monthly check-ins)
- Clarifies how reminders/updates are delivered (gentle nudges vs. firm reminders)

**SOP: Accountability Partner**

- **Impact:** Hit every goal with a built-in accountability system
- **How to Delegate:** Share your goal + preferred cadence for check-ins
- **Result:** XP tracks progress, sends reminders, and helps you stay on course

---

# How to Use This Pack

1. **Protocols = Guardrails** → Review with your XP once. They set the rules.
2. **SOPs = Quick Delegations** → Use daily. 30-second handoff, XP handles the rest.
3. **Result = Peace of Mind** → Routine tasks disappear, and your time is protected.

# Simplified Playbooks

Delete Annoyance (simple relief)

Never Wait on Hold Again

| Section | Details |
|---|---|
| **Protocol Title** | Never Wait on Hold Again |
| **Purpose** | Save hours each month by offloading tedious customer service calls, allowing the client to remain focused on high-value work. |
| **Scope - What's Covered** | - Calling banks or credit card companies.<br>- Changing flight or travel reservations.<br>- Following up on appointments or claims.<br>- Any vendor or customer service call with expected hold times. |
| **Authority - XP Can Do Without Asking** | - Place calls on the client's behalf.<br>- Navigate all phone menus (IVR).<br>- Manage the entire on-hold portion of the call. |
| **Exceptions - Must Confirm** | - Authorizing payments or accepting fees.<br>- Making a final, binding decision (e.g., confirming a new flight time). |
| **Information & Tools Provided** | - Client provides the goal and context via a quick voice note or text.<br>- Secure credential sharing tool (e.g., 1Password).<br>- Designated phone system (e.g., Zoom Phone) for call management. |
| **Approval Thresholds** | N/A |
| **Preferred Communication & Frequency** | - XP sends a summary via text/Slack immediately after each call.<br>- Uses pre-defined templates for updates. |
| **SOP - Step by Step** | 1. **Receive request** from client (who to call, goal, context)<br>2. **Review request** and gather all necessary info from the secure credential sheet.<br>3. **Place call**, navigate phone menus, and wait on hold.<br>4. **Connect with agent** and introduce the call on the client's behalf.<br>5. **Loop in client** for verification if required, using a pre-approved method (e.g., Zoom Merge Call).<br>6. **Send immediate summary** using the appropriate template ("Fully Handled" or "Input Needed"). |
| **Final Result** | The client is only looped in for the critical moments of a call, saving hours of unproductive time. A clear summary of the outcome is provided for every action taken, without the client ever having to listen to hold music. |
| **Agreement** | Client: _____________ XP: _____________ Date: _____________ |

## Worked Sample

**In-Flight Wi-Fi Refund**

1. The Client Delegates (via voice note)

*Hey Leo, quick one for you. On my United flight UA 458 from SFO to Newark last Saturday, August 30th, I paid $29.99 for Wi-Fi, but it never worked. It was charged to my Amex ending in 1005. Can you please call them and get that refunded? Thanks.*

2. The XP Acknowledges (via Slack, 2 minutes later)

*Hi John, I've received this. I will call United now and will update you as soon as I have a resolution.*

3. The XP Makes the Call

*[XP calls United Airlines customer service.]*
[After a 35-minute hold, an agent answers.]

United Agent (Jake): *Thank you for holding, you've reached United Customer Relations, this is Jake. How can I help you?*

XP (Leo): *Hi Jake, I'm calling on behalf of John Doe. She was on flight UA 458 last Saturday and purchased the in-flight Wi-Fi, but it wasn't operational. I'm calling to request a refund for that charge.*

United Agent (Jake): *I can certainly look into that for you. Let me check the service logs for that flight... Yes, I can confirm there was a network outage reported. I've gone ahead and processed a full refund of $29.99 back to the card on file.*

XP (Leo): *That's great, thank you. Could you please provide a confirmation number for the refund?*

United Agent (Jake): *Of course. The confirmation is UK5-820B.*

XP (Leo): *Got it. UK5-820B. Thank you for your help, Jake.*

4. The XP Reports the Resolution (via Slack)

Leo (XP) - 4:12 PM

✅ United Airlines Call Completed

Issue: *Request for a refund for in-flight Wi-Fi that was not working.*

Resolution: *I spoke with a representative named Jake who confirmed the network outage on the flight. He has processed a full refund of $29.99 back to your Amex ending in 1005. You should see the credit on your statement within 5-7 business days.*

Ref/Confirmation #: *The refund confirmation number is UK5-820B. An email confirmation was sent to you.*

5. The Outcome

The client saved nearly 45 minutes of active call and hold time, allowing them to stay focused on preparing for their board meeting, and their $29.99 was successfully refunded.

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## Never Shop Online Again

| Section | Details |
|---|---|
| **Protocol Title** | Never Shop Online Again |
| **Purpose** | Eliminate the friction of online shopping by delegating the tedious tasks of sourcing, filling out forms, and checkout. |
| **Scope - What's Covered** | - Direct purchases using a client-provided link.<br>- Sourcing 2-3 options based on client criteria.<br>- Signing up for new subscriptions or services.<br>- Paying online invoices and bills. |
| **Authority - XP Can Do Without Asking** | - Research and source product options based on client criteria.<br>- Complete a direct purchase using a provided link (within budget). |
| **Exceptions - Must Confirm** | - Which sourced option to purchase before buying.<br>- Any purchase exceeding the pre-defined approval threshold. |
| **Information & Tools Provided** | - Client provides a link or item criteria via text/Slack. |

| | |
|---|---|
| | - Secure password manager for payment credentials (e.g., 1Password).<br>- Client's preferred shipping addresses. |
| **Approval Thresholds** | - Any single purchase over $500 requires explicit client approval. |
| **Preferred Communication & Frequency** | - XP sends sourcing options or purchase confirmations immediately via text/Slack.<br>- Uses pre-defined templates for all updates. |
| **SOP - Step by Step** | 1. **Receive request** from the client (direct link or sourcing criteria).<br>2. **Source options** if needed; send to the client for a decision and await approval.<br>3. **Proceed to checkout** once an item is selected.<br>4. **Retrieve payment info** from the secure password manager.<br>5. **Complete purchase** and save the order confirmation (PDF/screenshot).<br>6. **Send a summary** to the client using the appropriate template ("Purchase Made" or "Options Ready"). |
| **Final Result** | The client's purchases are completed securely and efficiently. They receive a simple confirmation without ever having to research options or type in a credit card number again. |
| **Agreement** | Client: _____________ XP: _____________ Date: _____________ |

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## Worked Sample

**Sourcing a Book**

1. The Initial Request (Client sends via text):
   *(Client sends a picture of the book "Thinking, Fast and Slow" by Daniel Kahneman)*

> *Find this book for me. Find a used version at the lowest possible price that can get here within the next 48 hours.*

2. The XP's Follow-up (Sent 20 minutes later):

*Hi! Here are the best options I found for 'Thinking, Fast and Slow' that meet your criteria:*

*Option A: ThriftBooks*

- *Price: $5.19*
- *Condition: Very Good*
- *Delivery: Arrives by Thursday afternoon (within 48 hours).*

*Option B: Amazon Marketplace*

- *Price: $7.80*
- *Condition: Very Good*
- *Delivery: Arrives by tomorrow afternoon (fastest).*

***Recommendation:*** *I recommend Option A (ThriftBooks).*

*Why: It perfectly balances your two key requests. It is the lowest price by over 30% and is guaranteed to arrive within your 48-hour deadline. While Option B is one day faster, the $2.61 savings with Option A seems more aligned with your primary goal of finding the best possible deal.*
***Please give this message a 'thumbs up' (👍) to approve the purchase of Option A.*** *Let me know if you'd prefer Option B.*

3. The Client's Approval:

   (Client reacts to the message with a 👍 emoji)

4. The Final Confirmation (XP sends a few minutes later):

✅ Purchase Made: 'Thinking, Fast and Slow' by Daniel Kahneman (Used, Very Good)
Vendor: Amazon Marketplace
Total Cost: $7.80
Confirmation #: 113-882910-4452
Note: The book is confirmed for delivery by tomorrow, Sep 3rd. The order confirmation is in your email.

5. The Outcome:

   The client approved the purchase with a single tap, saving over $29 compared to buying the new book and spending zero time on research or checkout.

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Never RSVP Again

| Section | Details |
|---|---|
| **Protocol Title** | Never RSVP Again |
| **Purpose** | Free up time and mental space by creating a fully autonomous system for managing event invitations and the client's schedule. |
| **Scope - What's Covered** | - Email invitations (Google Calendar, Outlook).<br>- Platform invitations (Evite, Paperless Post).<br>- Informal invitations via text or messaging apps.<br>- Formal and wedding invitations. |
| **Authority - XP Can Do Without Asking** | - Accept or decline invitations based on the client's pre-defined rules documented in the RSVP Protocol.<br>- *Example: Auto-accept dinner invitations from 'VIP' contacts.* |
| **Exceptions - Must Confirm** | - Any invitation not covered by a pre-defined rule.<br>- Events requiring travel, payment, or significant time commitments.<br>- Invitations with a "+1" or guest option. |
| **Information & Tools Provided** | - A documented RSVP Protocol (created during a one-time kickoff conversation).<br>- Shared access to the client's primary calendar.<br>- (Optional) Personal CRM for logging key event details. |
| **Approval Thresholds** | N/A |
| **Preferred Communication & Frequency** | - XP sends a "Scheduling Digest" summarizing all actions taken.<br>- Frequency (e.g., daily, weekly) is determined in the RSVP Protocol. |
| **SOP - Step by Step** | 1. **Establish Protocol:** Conduct a one-time kickoff meeting to document the client's RSVP rules.<br>2. **Set up Filter:** Create an "Invitations" filter/label in the client's inbox.<br>3. **Daily Review:** Monitor the "Invitations" tab at least once daily.<br>4. **Process Invites:** Apply the RSVP Protocol to each invitation, updating the calendar accordingly.<br>5. **Send Digest:** Deliver the "Scheduling Digest" at the agreed-upon time, highlighting actions taken and items needing a decision. |
| **Final Result** | The client's calendar is managed proactively and intelligently in the background. They only spend a moment reviewing a single digest to make high-level decisions, not managing individual invitations. |
| **Agreement** | Client: _____________ XP: _____________ Date: _____________ |

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## Worked Sample

**The Proactive Events Review**

1. Leo begins his daily review of his client John's inbox. He scans the dedicated "Invitations" tab and sees four invitations that have arrived over the past few days.
2. Leo opens the shared "RSVP Event Tracker" sheet. He methodically logs each of the four events, capturing the Event Name, Event Type, and Key Attendees. This creates a clear, documented overview before any action is taken.
3. With the tracker updated, Leo consults John's RSVP Protocol.
    - The "Tech Founders Networking Dinner" and the "Family Friend's Wedding" match the "Always Accept" rule, so he RSVPs "Yes" to both and adds them to John's calendar.
    - The "Vendor Product Launch Cocktail" matches the "Always Decline" rule for vendor events, so he RSVPs "No."
    - The "Webinar on Fundraising Trends" falls under the "Always Ask" rule for virtual webinars, so he prepares it for the digest.
4. Leo then uses the "Scheduling Digest" template and sends the following email to John.

**Subject:** Scheduling Digest for Tuesday, August 27

Hi John,

Here is your scheduling digest for today, **August 27**.

**1. Actions Taken (FYI)**

Based on your protocol, I have taken the following actions on your behalf:

| Date Received | Event Name / Description | Event Type | Guest List / Key Attendees | Action | Notes (Why / Special Conditions) | Date Added to Calendar |
|---|---|---|---|---|---|---|
| 28-Aug-2025 | Tech Founders Networking Dinner | Professional / Work | Founders, C-Suite | Accepted | Client prioritized networking with founders. | 28-Aug-2025 |
| 29-Aug-2025 | Family Friend's Wedding | Family / Personal | N/A | Accepted | Always accept family milestones. | 12-Sep-2025 |

*These have all been updated on your calendar.*

**2. Needs Your Decision**

The following invitation has come in and requires your decision. Please just reply with "Yes to #1" or No to #1."

| Event Date | Event Name | Event Type | Key Attendees | Action | Notes |
|---|---|---|---|---|---|
| 30-Aug-2025 | Webinar on Fundraising Trends | Virtual | Industry Experts | Yes / No | Relevant to the upcoming fundraising round; wants to stay updated on industry trends and hear directly from investors |

Please let me know your decisions when you have a moment.

Best,

Leo

5. The Client's Reply

"Yes to #1."

6. John's calendar was populated with high-priority events and cleared of clutter, all managed proactively by Leo. He spent less than 10 seconds making one strategic decision, saving significant time and mental energy.

# Own Your Day (intentional design)

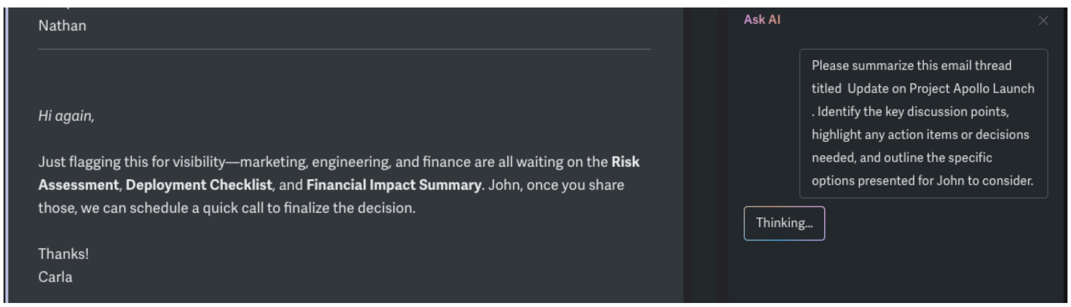
# Inbox Pre-Drafts

| Section | Details |
|---|---|
| **Protocol Title** | Inbox Predrafts |
| **Purpose** | Save up to 10 hours per week by turning complex email chains into simple decisions and delegating the composition of routine emails. |
| **Scope - What's Covered** | - Drafting recurring outbound emails (updates, thank yous, follow-ups).<br>- Summarizing long or complex inbound email threads.<br>- Analyzing project updates or proposals that arrive via email. |
| **Authority - XP Can Do Without Asking** | - Proactively scan the inbox for threads that meet the client's criteria.<br>- Use AI tools to generate initial summaries.<br>- Draft replies and decision memos based on the client's established writing style. |
| **Exceptions - Must Confirm** | - Client must personally review and send all final emails.<br>- Any decision that requires information outside the email thread. |
| **Information & Tools Provided** | - A documented Email Protocol (style, nuances, summarization rules).<br>- Delegated access to the client's email account.<br>- Access to an organization-verified AI tool (e.g., Superhuman, ChatGPT). |
| **Approval Thresholds** | N/A |
| **Preferred Communication & Frequency** | - XP sends a single notification via chat when new drafts are ready for review.<br>- Uses a pre-defined template for all notifications. |
| **SOP - Step by Step** | 1. **Scan inbox** for long threads or drafting opportunities based on the protocol.<br>2. **Summarize thread** using an AI tool and refine it for accuracy.<br>3. **Formulate 2-3 clear decision options** (A, B, C) for the client.<br>4. **Prepare draft reply**, pasting the summary and options at the top for client review.<br>5. **Notify client** via chat that drafts are ready.<br>6. **Monitor drafts folder** and execute follow-up actions after the client sends the email. |
| **Final Result** | The client's role shifts from writer to decision-maker. Complex issues are presented as simple choices, and communication remains timely and personal with minimal client effort. |
| **Agreement** | Client: _____________ XP: _____________ Date: _____________ |

## Worked Sample

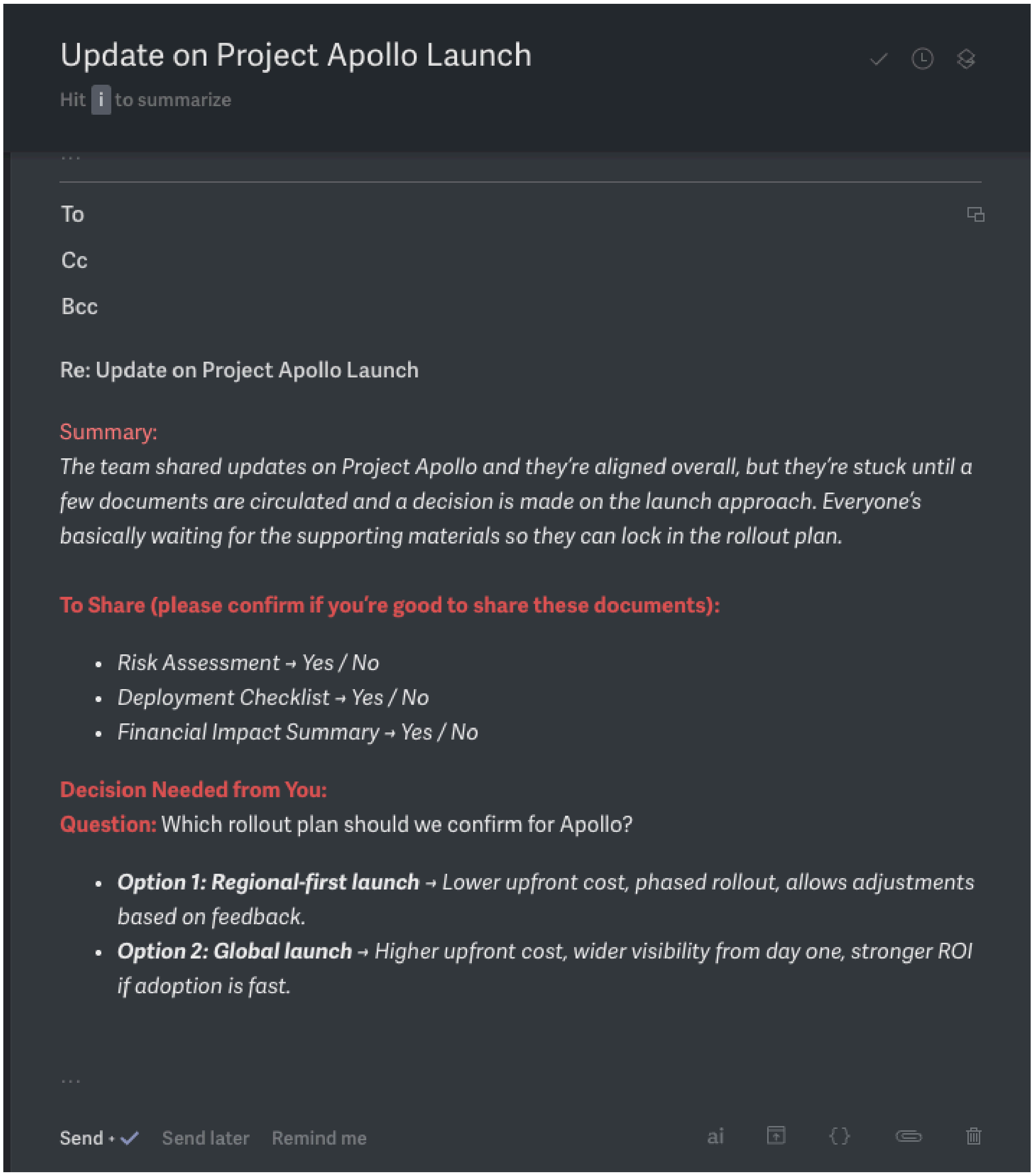
**The Long Email Thread**

1. At 8:00 AM, Leo, the XP, is scanning his client John's inbox. He sees a long email thread with the subject "*Update on Project Apollo Launch*" With 10+ replies from multiple team members, it meets John's protocol for summarization ("any thread with more than 5 replies").
2. Leo uses Superhuman's built-in AI summary feature to analyze the thread. He quickly reads the AI's output, verifies its accuracy against the key points in the email, and refines it slightly to add a nuance the AI missed. He then formulates three clear decision options for John.




He then hits "Reply All" on the latest email in the thread, immediately erases all recipients in the 'To:' and 'Cc:' fields, and pastes the following at the very top of the email draft, formatting it in red text as per John's protocol.

(Email Draft in John's Inbox)



Update on Project Apollo Launch

Hit i to summarize

To

Cc

Bcc

Re: Update on Project Apollo Launch

**Summary:**
*The team shared updates on Project Apollo and they're aligned overall, but they're stuck until a few documents are circulated and a decision is made on the launch approach. Everyone's basically waiting for the supporting materials so they can lock in the rollout plan.*

**To Share (please confirm if you're good to share these documents):**

- *Risk Assessment → Yes / No*
- *Deployment Checklist → Yes / No*
- *Financial Impact Summary → Yes / No*

**Decision Needed from You:**
**Question:** Which rollout plan should we confirm for Apollo?

- ***Option 1: Regional-first launch*** *→ Lower upfront cost, phased rollout, allows adjustments based on feedback.*
- ***Option 2: Global launch*** *→ Higher upfront cost, wider visibility from day one, stronger ROI if adoption is fast.*

Send · Send later Remind me ai

3. The Chat Notification (XP sends via Slack)

Leo (XP) - 9:00 AM
📧 Morning Email Drafts Ready for Review
Hi John, your email drafts for this morning are ready in your inbox.
The key one that needs your decision is the "Project Apollo Launch" thread. I've included a summary and A/B/C options for you.

4. John sees the Slack notification and opens his Drafts folder. He reads the 30-second summary, then edits the pre-drafted reply to input his decision and reasoning.

> Summary:
> *The team shared updates on Project Apollo and they're aligned overall, but they're stuck until a few documents are circulated and a decision is made on the launch approach. Everyone's basically waiting for the supporting materials so they can lock in the rollout plan.*
>
> **To Share (please confirm if you're good to share these documents):**
>
> - *Risk Assessment → Yes*
> - *Deployment Checklist → Yes*
> - *Financial Impact Summary → Yes*
>
> **Decision Needed from You:**
> **Question:** Which rollout plan should we confirm for Apollo?
>
> - ***Option 1: Regional-first launch*** *→ Lower upfront cost, phased rollout, allows adjustments based on feedback.*
> - ***Option 2: Global launch*** *→ Higher upfront cost, wider visibility from day one, stronger ROI if adoption is fast.*
>
> Let's go for Option A! Ty!

5. Leo monitors the Drafts folder and sees that John has input his decision ("Option A"). He removes the summary/options text, and sends the finalized reply to the team on John's behalf.

> Hi team,
>
> I've put together the key documents we need for the next steps: the Risk Assessment, Deployment Checklist, and Financial Impact Summary. These will help us finalize the plan.
>
> After looking at the options, let's go with the regional-first launch approach. This step-by-step rollout will help us keep costs under control and make changes based on early feedback.
>
> Please go ahead and send out the invite for the call so we can align and finalize the details. Thanks!
>
> - John

6. The Outcome

John made a key decision and provided his input in under a minute, without ever having to read the long thread or even hit "Send." His XP, Leo, handled all the analysis, drafting, and final execution, allowing John to stay focused on his primary work.

# Calendar Reset

## Design Your Ideal Week

| Section | Details |
|---|---|
| **Protocol Title** | Design Your Ideal Week |
| **Purpose** | Reclaim up to 10 hours of strategic time per week by transforming the calendar from a reactive list of meetings into a proactive plan. |
| **Scope - What's Covered** | - Initial onboarding to set a baseline for time management.<br>- Quarterly reviews to realign the calendar with evolving goals.<br>- Ad-hoc recalibration when work-life balance is off. |
| **Authority - XP Can Do Without Asking** | - Proactively block time for deep work, family, and health as defined in the protocol.<br>- Decline or reschedule incoming requests that violate the Ideal Week rules. |
| **Exceptions - Must Confirm** | - The initial Ideal Week proposal.<br>- Any request that requires breaking a "deep work" or personal block.<br>- Urgent requests from VIP contacts that conflict with the schedule. |
| **Information & Tools Provided** | - A documented "Ideal Week" Protocol (listing priorities and rules).<br>- Full edit/manage access to the client's primary calendar.<br>- A 'Calendar Auditing' playbook for detailed analysis. |
| **Approval Thresholds** | N/A |
| **Preferred Communication & Frequency** | - XP proposes the Ideal Week plan via email for client approval.<br>- Exceptions are handled via chat/text as they arise. |
| **SOP - Step by Step** | 1. **Establish Protocol:** Conduct a kickoff conversation to document the client's Ideal Week priorities.<br>2. **Audit Calendar:** Analyze the past 12 weeks of calendar data to find time usage patterns.<br>3. **Propose Plan:** Synthesize the audit and client goals into a proposed schedule.<br>4. **Client Approval:** Email the proposal and a visual of the new schedule for client feedback and approval.<br>5. **Implement:** Once approved, implement recurring time blocks on the live calendar.<br>6. **Manage Inbound:** Proactively manage all incoming requests according to the new protocol. |
| **Final Result** | The client's calendar becomes their greatest asset. Time is proactively allocated to their most important goals, creating the space to think, create, and live a balanced life. |
| **Agreement** | Client: _____________ XP: _____________ Date: _____________ |

## Worked Sample

**Reclaiming a CEO's Calendar**

1. John, a CEO, expresses frustration to his XP, Leo, that his weeks are purely reactive and controlled by his inbox. Leo schedules a 20-minute "Ideal Week Kickoff" call. During the call, he uses the "Ideal Week Protocol" template as a guide to ask John targeted questions. He documents John's key preferences: protecting mornings for deep work, keeping Fridays meeting-free, and blocking out family dinner and his M/W/F workouts.

2. Following the call, Leo conducts an audit of John's calendar from the past month. He discovers that 65% of John's time was spent in reactive, internal meetings, and less than 10% was available for focused work. Fridays were consistently filled with last-minute calls. Leo synthesizes these findings with John's stated goals and prepares a formal proposal email.

[screenshot of calendar]

3. Leo sends the following email to John for his review and approval.

Subject: Your Ideal Week: Proposal for Review

Hi John,

Following our conversation, I've completed an audit of your calendar. The key finding is that approximately 65% of your time is currently spent in reactive, internal meetings, with less than 10% protected for deep work.

Based on this and the priorities you shared, I've created the proposed "Ideal Week" template you'll find attached.

If you approve, the key changes I will implement are:

- Block 9 AM - 11 AM on Mondays, Tuesdays, and Thursdays for "Deep Work."
- Decline any new meeting requests for Fridays to keep that day open for strategic review.
- Set a 15-minute buffer time between all back-to-back meetings.
- Permanently block 6 PM - 8 PM on weekdays for "Family Time."

Please review the attached template and let me know if you have any feedback or if I have your approval to proceed.

Best,

Leo

4. The Client's Reply

"This is perfect. Please proceed."

5. The Outcome

Leo implements the changes. In the following weeks, John's calendar accurately reflects his priorities. He has protected time for strategic work, his meetings are more manageable, and his evenings are free, all because of a single 20-minute conversation and a proactive audit by his XP.

# Never Miss A Workout Again

| Section | Details |
|---|---|
| **Protocol Title** | Never Miss a Workout Again |
| **Purpose** | Build and maintain consistency for key habits—from workouts to deep work—by creating a powerful external accountability structure. |
| **Scope - What's Covered** | - Building a consistent morning routine (exercise, meditation, journaling).- Enforcing a "deep work" or "focus" block in the schedule.- Providing a "work buddy" for tasks prone to procrastination. |
| **Authority - XP Can Do Without Asking** | - Join all scheduled accountability sessions.- Provide time updates or other agreed-upon prompts during the session.- Send a confirmation notice after each completed session. |
| **Exceptions - Must Confirm** | - Client must initiate any changes, cancellations, or rescheduling of a session. |
| **Information & Tools Provided** | - Client defines the activity, schedule, and rules of engagement (e.g., "silent partner," "5-minute warning").- A recurring calendar invitation with a video conference link (e.g., Zoom). |
| **Approval Thresholds** | N/A |
| **Preferred Communication & Frequency** | - XP provides in-session prompts via chat as requested.- XP sends a "Session Complete" confirmation via chat after each session. |
| **SOP - Step by Step** | 1. **Define Routine:** Client provides the activity, schedule, and the XP's role during the session.2. **Schedule Invite:** XP creates and sends a recurring calendar invitation.3. **Join Call:** XP joins the video call five minutes before the scheduled start time.4. **Provide Support:** XP remains on the call for the entire duration, acting as a silent partner and providing prompts as requested.5. **Confirm Completion:** At the end of the session, the XP sends the "Session Complete" confirmation notice. |
| **Final Result** | The client builds powerful keystone habits through the simple motivation of a shared commitment, ensuring they show up and stay focused on their personal and professional goals. |
| **Agreement** | Client: _____________ XP: _____________ Date: _____________ |

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Worked Example

| |
|---|
| **Scenario:** The client, a respected founder, wants to host an intimate, high-value dinner at their home. The goal is to connect a curated group of 10 local founders and 2 strategic investors in a relaxed setting, allowing for deep conversation and relationship-building. The client's primary objective is to be a present and engaged host, leaving all logistical and executional details to their XP. |
| **T-4 Days: Invitations & RSVP Management** |

| |
|---|
| **Action:** The XP sends out elegant, personalized invitations via Paperless Post to the curated guest list. They then manage all RSVPs and guest communications, providing the client with regular updates. |
| **T-3 Days: Experience Curation & Final Prep** |
| **Action:** With the final guest list confirmed, the XP creates a strategic seating chart designed to place guests with complementary interests or potential synergies next to each other.<br>Action: The XP designs and prints high-quality place cards. On the back of each card, a unique conversation prompt is included to spark meaningful dialogue, such as,<br><br>"What's your biggest delegation breakthrough this year?" |
| **Action:** The XP sends a final confirmation email to all attendees with the address, timing, and a note about the evening's intimate, salon-style format. |
| **Day-Of: On-Site Execution** |
| **Action:** The XP arrives at the client's home an hour early to coordinate with the private chef and oversee the final setup, ensuring the ambiance is perfect. Action: As guests arrive, the XP greets them, checks them in, and gently guides them, ensuring the evening flows seamlessly and introductions are made. |
| **Post-Event: Follow-Up & Data Capture** |
| **Action 1:** The XP compiles a clean, organized list of all attendees, including their contact details and any relevant notes, for the client's records. Action: The XP drafts a personalized thank-you email template for the client to send to each guest, solidifying the connections made during the evening. |
| **Action 2:** The XP drafts a personalized thank-you email template for the client to send to each guest, solidifying the connections made during the evening. |
| **Final Result** |
| The client successfully hosted a high-impact networking event without the stress of managing logistics. They were able to focus entirely on their guests, fostering strong relationships in an effortlessly elegant environment. The post-event follow-up, prepared by the XP, ensured the momentum from the evening was maintained. |

# Never Miss A Goal Again

| Section | Details |
|---|---|
| **Protocol Title** | Never Miss a Goal Again |
| **Purpose** | Create a powerful accountability system that turns long-term ambitions into concrete daily actions, ensuring consistent progress on your most important goals. |
| **Scope - What's Covered** | - Making consistent progress on long-term professional or personal goals.<br>- Providing an external system to maintain focus and accountability.- Breaking down large, intimidating projects into manageable daily steps. |
| **Authority - XP Can Do Without Asking** | - Review the client's calendar and project boards to identify priorities.<br>- Propose a single, high-impact daily goal for the client's consideration.<br>- Update the goal tracker with client-reported progress.- Compile and send a weekly progress summary. |
| **Exceptions - Must Confirm** | - The client must always confirm or set their own final goal for the day. |
| **Information & Tools Provided** | - A shared Goal Tracker listing the client's 3-5 long-term goals<br>- Read-only access to the client's work calendar and relevant project boards (e.g., Asana).<br>- A messaging app (Text, Slack) for the daily check-in. |
| **Approval Thresholds** | N/A |
| **Preferred Communication & Frequency** | - XP sends a "Daily Goals Check-in" at a pre-agreed time.- XP sends a "Weekly Progress Summary" at the end of each week. |
| **SOP - Step by Step** | 1. **Establish Goals:** Conduct a kickoff to document the client's 3-5 major goals in a shared tracker.<br>2. **Daily Review:** Before the check-in time, the XP reviews the client's calendar and projects to identify a key task.<br>3. **Check-In:** The XP sends the "Daily Goals Check-in" message, including the proposed focus for the day.<br>4. **Update Tracker:** After the client responds, the XP updates the goal tracker with their progress and notes.<br>5. **Weekly Summary:** At the end of the week, the XP sends the "Weekly Progress Summary" to the client. |
| **Final Result** | The client maintains consistent momentum on their most important goals. The daily loop provides the proactive support, structure, and accountability needed to turn big plans into real, measurable progress. |
| **Agreement** | Client: _____________ XP: _____________ Date: _____________ |

Worked Example

| |
|---|
| **Scenario:** A client, a founder, is working towards two major Q4 goals: 1) Launch a new product and 2) Hire a VP of Sales. They ask their XP to implement the "Never Miss a Goal Again" playbook to ensure they make consistent daily progress. |
| **Step 1: Establish Goals** |

| |
|---|
| **Action:** In a kickoff meeting, the client and XP document the two major goals in a shared Goal Tracker. They agree on an 8:00 AM daily check-in via text. |
| **Step 2 & 3: Daily Review & Check-In** |
| **Action 1:** At 7:45 AM, the XP reviews the client's calendar and Asana board. They see a critical task, "Finalize product spec doc," is due this week. |
| **Action 2:** At 8:00 AM, the XP sends the daily check-in message.<br>**Template Used:**<br>**Daily Goals Loop: Sept 9**<br>**Yesterday's Progress:** How did you do on 'Drafting the job description'?<br>**Today's Focus:** Based on Asana, it looks like the #1 thing to accomplish today is '**Finalize the product spec doc**.' Does that feel right? |
| **Step 4: Update Tracker** |
| **Action:** The client replies to the text, confirming the goal and their progress. The XP updates the shared Goal Tracker with the client's notes. |
| **Step 5: Weekly Summary** |
| **Action:** At the end of the week, the XP reviews the tracker and sends the "Weekly Progress Summary".<br>**Template Used: Weekly Goals Summary: Week of Sept 8**<br>**Wins This Week:** Finalized the product spec doc; completed the first draft of the VP of Sales job description.<br>**Focus for Next Week:** Begin user testing interviews for the new product. |
| **Final Result** |
| The client maintains consistent momentum on their most important goals. The daily prompt from the XP provides the structure and accountability needed to break down their large goals into manageable daily actions, ensuring real, measurable progress is made each week.. |

Alt version for the goals:
https://docs.google.com/document/d/1ydfYm5IFOVXChZRO7KJewzAMiTR6X6lenharZIkpqdM/edit?tab=t.0

# Run Life Like a Hotel (systemized living)

# Auto Stock

## Never Run Out of Essentials Again

| Section | Details |
|---|---|
| **Protocol Title** | Never Run Out of Essentials Again |
| **Purpose** | Save 2-3 hours per week and eliminate last-minute store runs by creating a system to automate the ordering of all household essentials. |
| **Scope - What's Covered** | - Automating recurring orders (toiletries, cleaning supplies, pet food).<br>- Weekly grocery shopping, especially when linked to a meal plan.<br>- Managing subscriptions for any regularly purchased items. |
| **Authority - XP Can Do Without Asking** | - Set up and manage automated deliveries for pre-approved items.<br>- Place weekly grocery orders that align with the meal plan and budget.<br>- Adjust order frequencies based on periodic inventory reviews.<br>- Update all tabs of the "Smartt Essentials & Budget Tracker" after each order. |
| **Exceptions - Must Confirm** | - Adding any new items or brands to the master list.<br>- Any order that will exceed the pre-defined budget.<br>- Switching to a new vendor or delivery service. |
| **Information & Tools Provided** | - The **"Smart Essentials & Budget Tracker"** (with Essentials, Budget, and Vendor tabs) serves as the single source of truth.<br>- Access to preferred online retailer accounts (e.g., Amazon, Instacart).<br>- A secure method for sharing payment credentials (e.g., 1Password). |
| **Approval Thresholds** | - Client to define a budget per order (e.g., "Weekly grocery budget: $XXX"). |
| **Preferred Communication & Frequency** | - XP sends an "Order Confirmation" notice via chat/text after any order is placed. |
| **SOP - Step by Step** | 1. **Establish Protocol:** Conduct a kickoff to create a master list of items, brands, frequencies, and vendors.<br>2. **Set Up Automation:** Use the **"Vendor Tracker"** to log in and set up recurring deliveries based on items in the **"Essentials Tracker"**.<br>3. **Manage Manual Orders:** Use the **"Essentials Tracker"** as the shopping list for weekly manual orders<br>4. **Review & Adjust: Update Tracker:** After each purchase, log the expenditure in the **"Budget Tracker"**<br>5. **Confirm Orders:** After each order, send the "Order Confirmation" notice to the client.<br>6. Periodically review the entire tracker with the client to adjust items, budgets, or vendors. |
| **Final Result** | Household essentials are replenished automatically. The client saves time and mental energy, avoids inconvenient last-minute trips to the store, and never worries about running out of their favorite items again. |

| **Agreement** | Client: _____________ XP: _____________ Date: _____________ |
|---|---|

Worked Example

| |
|---|
| **Scenario:** The client, Anna, wants to automate her household shopping to save time and gain a clear understanding of her weekly and monthly spending on essentials. She and her XP decide to implement the "Never Run Out of Essentials Again" playbook using the 3-tab "Smart Essentials & Budget Tracker." |
| **Step 1: The Kickoff Conversation** |
| **Action:** Anna and her XP hold a kickoff call to populate the tracker.<br>● Essentials Tracker Tab: They list weekly groceries (milk, eggs, chicken, spinach) and monthly supplies (Blue Bottle coffee, Seventh Generation paper towels, Taste of the Wild dog food).<br>● Vendor Tracker Tab: Anna provides access details for Instacart and Amazon via a secure password manager.<br>● Budget Tracker Tab: They set the budgets: $200/week for groceries and $100/month for supplies. |
| **Step 2: System Setup** |
| **Action 1**: The XP uses the **Vendor Tracker** to log into Anna's Amazon account. |
| **Action 2**: Referencing the **Essentials Tracker**, the XP sets up "Subscribe & Save" for the coffee, paper towels, and dog food. The total monthly cost is $85. |
| **Step 3 & 4: First Grocery Order & Tracking** |
| **Action 1**: The XP logs into Instacart to place the weekly grocery order. They use the **Essentials Tracker** tab as the shopping list. The final cart total is **$188.50**. |
| **Action 2:** The XP immediately navigates to the Budget Tracker tab and enters the new expense, which shows that Anna is still within her weekly budget. |
| **Step 5: Confirmation** |
| **Action:** After placing the order and updating the tracker, the XP sends a confirmation to Anna.<br>**Template Used:**<br>**Order Placed:** Instacart<br>**Items:** Weekly Groceries<br>**Total Cost:** $188.50<br>**Delivery ETA:** Saturday, September 6, between 10 AM - 12 PM<br>**Note:** The Budget Tracker has been updated. |
| **Step 6: Ongoing Review** |

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| **Action**: At the end of the month, the automated Amazon order of $85 is also logged in the **Budget Tracker**. The XP can now provide a high-level summary: "Hi Anna, quick update for September: We stayed under budget for both groceries and supplies. The tracker is fully updated if you'd like to see the details!" |
| **Final Result** |
| Anna's home is consistently stocked with all her preferred items, and she has spent zero time on shopping or planning. More importantly, the **Smartt Essentials & Budget Tracker** gives her a real-time, accurate view of her household spending, providing complete control and peace of mind. |

## Remote Household Manager

| Section | Details |
|---|---|
| **Protocol Title** | Remote Household Management |
| **Purpose** | Save over an hour each week and reduce the mental load of managing your household by creating a system for an XP to proactively oversee your home's needs. |
| **Scope - What's Covered** | - Automating the restocking of groceries, pantry items, and supplies.<br>- Proactively identifying and scheduling home maintenance and repairs.<br>- Coordinating with a trusted in-home contact (e.g., housekeeper, nanny). |
| **Authority - XP Can Do Without Asking** | - Place grocery and supply orders within the pre-defined budget.-<br>Schedule routine or pre-approved maintenance and repair services.<br>- Communicate directly with the in-home contact for status updates. |
| **Exceptions - Must Confirm** | - Any single order or service that exceeds the budget.<br>- Scheduling major, non-routine, or unexpected repairs.<br>- Hiring a new, non-pre-approved service provider. |
| **Information & Tools Provided** | - A group messaging app to connect the XP and the in-home contact.<br>- Client defines the weekly "scan" requirements (e.g., "send photos of the fridge and pantry every Friday").<br>- Access to preferred vendors for groceries and home services. |
| **Approval Thresholds** | - Client to authorize a budget per action (e.g., "Grocery orders under $200"). |
| **Preferred Communication & Frequency** | - XP sends a "Weekly Home Summary" to the client after each weekly check-in. |
| **SOP - Step by Step** | 1. **Establish Protocol:** Connect the XP and in-home contact in a group chat and define the weekly "scan" process.<br>2. **Receive Updates:** XP receives weekly photos and updates from the in-home contact.<br>3. **Analyze & Action:** XP analyzes the updates to create a list of needs (restocking, repairs). |

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| | 4. **Execute:** XP places orders and schedules services according to their authority and budget.<br>5. **Report to Client:** XP delivers the "Weekly Home Summary," detailing actions taken and flagging future needs. |
| **Final Result** | The client's home is managed proactively in the background. Supplies are replenished and issues are addressed before they require the client's attention, giving them peace of mind and freeing up their mental space. |
| **Agreement** | Client: ______________ XP: ______________ Date: ______________ |

Worked Example

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| **Scenario:** The client, who travels frequently for work, wants to ensure their home essentials are always stocked and minor maintenance issues are handled proactively. They have a trusted housekeeper, Maria, who visits every Friday. |
| **Step 1: Establish Protocol** |
| **Action:** Following the playbook, the XP creates a WhatsApp group chat to connect with the client and Maria, the in-home contact. |
| **Action:** The XP confirms the weekly "scan" process in the chat: "Hi Maria, as discussed with the client, please send photos of the fridge and pantry every Friday morning. Thank you!" |
| **Action:** The client authorizes the budget as per the protocol's approval threshold: "XP, you are authorized for grocery orders up to $200". |
| **Step 2 & 3: Receive Updates and Analyze** |
| **Action:** Maria sends photos to the WhatsApp group. The pictures show that milk, eggs, and fresh vegetables are running low. She also sends a photo of a burnt-out lightbulb in a high-ceiling fixture. |
| **Action:** The XP analyzes these updates to create a list of needs: a grocery restock and a handyman service for the lightbulb. |
| **Step 4: Execute** |
| **Action:** The XP places an Instacart order for the needed groceries, totaling $162, which is within the pre-defined budget. |
| **Action:** The XP contacts the client's pre-approved handyman service to schedule a visit for the following week to replace the lightbulb, as this falls under "routine maintenance". |
| **Step 5: Report to Client** |
| **Action**: The XP sends the "Weekly Home Summary" to the client via email.<br>**Template Used:**<br>**Home Status Update:** Week of September 8, 2025<br>**Actions Taken:** Restocked pantry and fridge staples via Instacart ($162). Scheduled the handyman for Tuesday at 10 AM to replace the hallway lightbulb.<br>**Heads-Up:** Noticed the coffee supply is about halfway. Proposing we add it to the order in two weeks. |
| **Final Result** |

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| The home is managed proactively in the background. The client returns from their work trip to a fully stocked kitchen and a scheduled solution for their maintenance issue, all without their direct involvement. This frees up their mental space and saves them from dealing with household chores upon their return. |

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# Travel Kit

## Automated Travel Booking

| Section | Details |
|---|---|
| **Protocol Title** | Automated Travel Booking |
| **Purpose** | Save 1-5+ hours per trip and eliminate planning hassle by using a centralized profile of all travel preferences. |
| **Scope - What's Covered** | - Initial onboarding to create the comprehensive Travel Profile.<br>- End-to-end booking for all business and personal travel.<br>- Management of all travel-related loyalty programs and personal details. |
| **Authority - XP Can Do Without Asking** | - Research flight, hotel, and ground transport options that align with the Travel Profile.<br>- Propose 1-2 curated itineraries for client review. |
| **Exceptions - Must Confirm** | - The final itinerary before any non-refundable bookings are made.<br>- Any proposed options that deviate from the Travel Profile (e.g., non-preferred airlines or hotels). |
| **Information & Tools Provided** | - A comprehensive Travel Profile (listing all preferences, loyalty numbers, etc.).<br>- A secure method for sharing payment credentials.<br>- Client provides destination and dates for each trip request. |
| **Approval Thresholds** | - Client to define a budget per trip (e.g., "Business travel budget: $XXX"). |
| **Preferred Communication & Frequency** | - XP sends a "Proposed Itinerary" for client review and approval.<br>- XP sends a final "Trip Confirmation" and calendar invites once booked. |
| **SOP - Step by Step** | 1. **Create Profile:** Conduct a kickoff meeting to create and approve the client's master Travel Profile.<br>2. **Receive Request:** Client provides trip destination and dates.<br>3. **Research & Propose:** XP researches options based on the profile and sends 1-2 curated itineraries for approval.<br>4. **Book & Confirm:** Once the client approves an option, the XP books all travel components.<br>5. **Consolidate & Deliver:** XP creates a single trip itinerary, sends the final confirmation, and adds all events to the client's calendar. |

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| **Final Result** | Travel is booked perfectly to the client's specifications every time. The client simply states their destination and dates, and a complete, personalized itinerary appears on their calendar without them ever having to search for flights or hotels. |
| **Agreement** | Client: _____________ XP: _____________ Date: _____________ |

Worked Example

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| **Scenario:** A client, a consultant, needs to book a trip to New York for a three-day client meeting. Their Travel Profile is already on file with their XP, noting a preference for Delta, Marriott hotels, and a total trip budget of $1,500. |
| **Step 1 & 2: Profile Created & Request Received** |
| **Action:** The client's master Travel Profile is already complete and approved. The client sends a brief request via email: "I need to be in NYC for meetings from October 6-8. Please book travel.". |
| **Step 3: Research & Propose** |
| **Action 1:** The XP researches options that align with the client's profile. They find a suitable Delta flight and a room at the Marriott Marquis that are both within budget. |
| **Action 2:** The XP sends the "Proposed Itinerary" to the client for review.<br>Template Used:<br>Options for Your Trip to NYC<br>Option 1:<br>• Flight: Delta, nonstop, LGA, aisle seat confirmed.<br>• Hotel: Marriott Marquis, King Room, high floor requested.<br>• Total Cost: $1,350<br>Note: This option aligns with all your preferences. Please let me know if you'd like me to book. |
| **Step 4: Book & Confirm** |
| **Action:** The client replies with "Looks great, please book it." The XP immediately books all travel components using the client's securely stored credentials. |
| **Step 5: Consolidate & Deliver** |
| **Action 1:** The XP creates a single trip itinerary document with all confirmation numbers and details. The XP sends the final "Trip Confirmation" email, attaches the itinerary, and adds all relevant events to the client's calendar. |
| **Final Result** |
| The client's entire trip was booked to their exact specifications in under 48 hours with minimal effort on their part. They simply stated their destination and dates and received a complete, personalized itinerary on their calendar. |

# Multiply Your Impact (scale without strain)

# Make Friends, Gain Influence

## Monthly Salons / Founder Dinners

| Section | Details |
|---|---|
| **Protocol Title** | Monthly Salons / Founder Dinners |
| **Purpose** | Host curated gatherings that deepen relationships and expand your network effortlessly. |
| **Scope – What's Covered** | - Monthly dinner with ~10 guests.<br>- Venue: client's home (private chef/catered) or restaurant. |
| **Authority – XP Can Do Without Asking** | - Curate invite list of 10 new/interesting people.<br>- Manage invitations, RSVPs, menu, and logistics. |
| **Exceptions – Must Confirm** | - Any guest not aligned with client's network goals.<br>- Event budget >$2,000. |
| **Information & Tools Provided** | - Client's network list + preferences.<br>- Budget and venue options. |
| **Approval Thresholds** | - Up to $2,000 → XP may proceed.<br>- $2,000–$5,000 → Notify client.<br>- Above $5,000 → Explicit approval. |
| **Preferred Communication & Frequency** | - XP proposes guest list 3 weeks prior.<br>- Weekly update until event. |
| **SOP – Step by Step** | 1. **T-6 Weeks** → Draft invite list + propose venue/menu.<br>2. **T-4 Weeks** → Send invites + manage RSVPs.<br>3. **T-2 Weeks** → Confirm chef/restaurant or catering.<br>4. **T-3 Days** → Finalize seating, print prompts.<br>5. **Day-Of** → Ensure set-up, host packet ready.<br>6. **Post** → XP logs attendees + prepares thank-you notes. |
| **Final Result** | A seamless, curated dinner where the client shows up as host without logistical burden. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |
| **Protocol Title** | Monthly Salons / Founder Dinners |

### Worked Example

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| **Scenario:** The client, a respected founder, wants to host an intimate, high-value dinner at their home. The goal is to connect a curated group of 10 local founders and 2 strategic investors in a relaxed setting, allowing for deep conversation and relationship-building. The client's primary objective is to be a present and engaged host, leaving all logistical and executional details to their XP. |
| **T-4 Days: Invitations & RSVP Management** |
| **Action:** The XP sends out elegant, personalized invitations via Paperless Post to the curated guest list. They then manage all RSVPs and guest communications, providing the client with regular updates. |
| **T-3 Days: Experience Curation & Final Prep** |
| **Action 1:** With the final guest list confirmed, the XP creates a strategic seating chart designed to place guests with complementary interests or potential synergies next to each other.<br>Action: The XP designs and prints high-quality place cards. On the back of each card, a unique conversation prompt is included to spark meaningful dialogue, such as,<br><br>"What's your biggest delegation breakthrough this year?" |
| **Action 2:** The XP sends a final confirmation email to all attendees with the address, timing, and a note about the evening's intimate, salon-style format. |
| **Day-Of: On-Site Execution** |
| **Action:** The XP arrives at the client's home an hour early to coordinate with the private chef and oversee the final setup, ensuring the ambiance is perfect. Action: As guests arrive, the XP greets them, checks them in, and gently guides them, ensuring the evening flows seamlessly and introductions are made. |
| **Post-Event: Follow-Up & Data Capture** |
| **Action 1:** The XP compiles a clean, organized list of all attendees, including their contact details and any relevant notes, for the client's records. Action: The XP drafts a personalized thank-you email template for the client to send to each guest, solidifying the connections made during the evening. |
| **Action 2:** The XP drafts a personalized thank-you email template for the client to send to each guest, solidifying the connections made during the evening. |
| **Final Result** |
| The client successfully hosted a high-impact networking event without the stress of managing logistics. They were able to focus entirely on their guests, fostering strong relationships in an effortlessly elegant environment. The post-event follow-up, prepared by the XP, ensured the momentum from the evening was maintained. |

Thoughtful Gift Giving

| Section | Details |
|---|---|
| **Protocol Title** | Thoughtful Gift Giving (Kids + Adults) |
| **Purpose** | Ensure every birthday, holiday, and milestone is marked with thoughtful, on-time gifts. |
| **Scope – What's Covered** | - Kids' birthday parties.<br>- Friends'/family holidays, milestones, or surprise gifts. |
| **Authority – XP Can Do Without Asking** | - Research age-appropriate gifts via sources like NYT "Best Children's Gifts."<br>- Order, wrap, and deliver to home at least 2 weeks in advance.<br>- Maintain master gift tracker. |
| **Exceptions – Must Confirm** | - Gifts >$200.<br>- Unfamiliar adults (requires client guidance). |
| **Information & Tools Provided** | - List of kids' classmates + friends/family birthdays.<br>- Corporate/personal card in 1Password. |
| **Approval Thresholds** | - Up to $200 → proceed.<br>- $200–$500 → notify client.<br>- Above $500 → explicit approval. |
| **Preferred Communication & Frequency** | - XP confirms birthday calendar monthly.<br>- Slack update once gift is ordered + ETA. |
| **SOP – Step by Step (Kids)** | 1. **Upon Invite** → XP logs party date.<br>2. **Next Day** → Prompt client to ask child what their friend likes.<br>3. **T-2 Weeks** → Order + deliver wrapped gift to home.<br>4. **Day Before** → Slack reminder: "✅ Gift ready for Max's party."<br>5. **Post** → Log in Gift Tracker. |
| **SOP – Step by Step (Adults)** | 1. Maintain calendar of birthdays/holidays.<br>2. Research thoughtful gifts aligned with interests.<br>3. Order + deliver (wrapped or digital).<br>4. Confirm with client upon delivery.<br>5. Track all gifts in master sheet. |
| **Final Result** | Client always shows up with the perfect gift — thoughtful, timely, and stress-free. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

### Worked Example

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| **Scenario:** The client is a busy parent whose child has been invited to a friend's 8th birthday party. The goal is to handle the entire gift-giving process—from idea to delivery—proactively, ensuring a thoughtful, age-appropriate gift is purchased, wrapped, and ready for the party on time. |
| **February 1: Invitation Received & Intel Gathering** |
| **Action 1**: The client forwards the birthday party invitation for their child's friend, **Max**, to the XP. |
| **Action 2**: The XP immediately adds the party date to the family calendar and sends a simple prompt to the client: "*Got it! Could you ask your child what Max is interested in these days so we can find the perfect gift?*" |
| **February 3: Research & Recommendation** |
| **Action 1**: The client replies with a one-word answer: "*dinosaurs.*" |
| **Action 2**: The XP researches top-rated dinosaur-themed gifts for 8-year-olds, identifying the **"Smithsonian Dino Dig Kit"** ($65), which was noted as a top pick by the NYT. |
| **February 4: Purchase & Logistics** |
| **Action:** The XP orders the gift using the client's pre-approved budget and payment method. They select the gift-wrapping option and schedule the delivery for February 10, well ahead of the party. |
| **February 14: The Final Reminder** |
| **Action:** The day before the party, the XP sends a clear and concise confirmation to the client, closing the loop and eliminating any last-minute stress. |
| **Final Result** |
| The client received a simple, proactive reminder: "✅ Dino Kit ready for Max's party tomorrow." A high-quality, well-researched, and fully wrapped gift was ready to go without the client having to spend any time on the task. The process ensured their child arrived at the party feeling confident and prepared, effortlessly managing the social obligations of a busy family. |

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| **Scenario:** The client's close friend has achieved a major career milestone: being promoted to Partner. To honor the occasion, the client is attending a celebratory dinner on March 1st and wants to present a significant, personalized gift. The objective is to find a prestigious and thoughtful item without the client needing to spend time on research, sourcing, or logistics. |
| **Mid-February: Briefing & Ideation** |

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| **Action 1**: The client notifies the XP about the promotion and the upcoming celebration, providing a budget of $250. |
| **Action 2**: The XP researches classic, high-end gift options appropriate for a new Partner. They create a short, curated list of 2-3 ideas, with the top recommendation being a timeless Montblanc pen that can be engraved. |
| **February 15: Proposal & Explicit Approval** |
| **Action 1**: The XP sends the curated gift options to the client with links, pricing, and a clear recommendation. |
| **Action 2**: The client replies with explicit approval to purchase the engraved Montblanc pen and provides the friend's initials for the personalization. |
| **February 16: Purchase & Personalization** |
| **Action 1:** The XP places the order, coordinating directly with the vendor to ensure the engraving is executed perfectly. They also request premium gift boxing. |
| **Action 2:** The XP schedules the delivery for February 20th, ensuring the gift arrives at the client's home well in advance of the dinner. |
| **Post-Event: Record Keeping** |
| **Action:** After the client presents the gift at the dinner, the XP updates the client's personal Gift Tracker. They log the recipient, occasion, gift details, date, and vendor. |
| **Final Result** |
| The client presented a sophisticated and personal gift that perfectly commemorated their friend's significant achievement. The process was entirely managed by the XP, requiring only a single, clear decision from the client. By logging the details in a Gift Tracker, the XP also ensures a valuable record is kept for future reference, preventing duplicate gifts and remembering important personal milestones. |

## Friendship Maintenance Tracker

| Section | Details |
|---|---|
| **Protocol Title** | Friendship Maintenance Tracker |
| **Purpose** | Systematically nurture personal and professional friendships so important relationships never go cold. |
| **Scope – What's Covered** | - Personal friends, family, mentors.<br>- Professional peers, clients, alumni. |
| **Authority – XP Can Do Without Asking** | - Maintain a tracker with birthdays, milestones, last contact dates.<br>- Draft light-touch check-ins (texts, emails, notes).<br>- Suggest monthly outreach list for client. |

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| **Exceptions – Must Confirm** | - Sensitive outreach (e.g., condolence notes).<br>- Major life events requiring gifts or travel. |
| **Information & Tools Provided** | - Contact list (Google Contacts, LinkedIn, CRM).<br>- Calendar of birthdays, anniversaries.<br>- Client's preferred communication style (text/email/call). |
| **Approval Thresholds** | - Light-touch check-ins (texts, emails) → XP drafts + proceeds.<br>- Gifts >$200 or events → explicit client approval. |
| **Preferred Communication & Frequency** | - Monthly "Friendship Report" via Slack/Notion: list of who to reach out to + draft messages.<br>- Real-time reminders for birthdays/milestones. |
| **SOP – Step by Step** | 1. **Monthly** → XP updates tracker with birthdays, milestones, last contact.<br>2. Draft 5–10 outreach messages (texts/emails) in client's style.<br>3. Share "Friendship Report" with client.<br>4. Client approves/tweaks in <10 min.<br>5. XP schedules or preps reminders.<br>6. Post-outreach → XP logs date + outcome in tracker. |
| **Final Result** | Client consistently maintains 50+ warm friendships with minimal effort; no birthday or milestone missed. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |
| **Protocol Title** | Friendship Maintenance Tracker |

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**Worked Example**

**Scenario:** The client is a busy professional who wants to maintain strong personal and professional relationships but lacks the time to track important dates and follow-ups. To solve this, the XP creates a proactive monthly "Friendship Report" that identifies key opportunities for connection and provides pre-drafted messages, turning the client's good intentions into consistent action.

**March 1: Report Compilation & Drafting**

**Action 1**: The XP reviews the client's personal relationship tracker and flags the most important connection points for March. The highlights include:

- **David Chen**: Birthday on March 15th.
- **Samantha Lee**: Welcomed a new baby on March 1st.
- **Andre Johnson**: Owed a thank you for a valuable professional introduction made in January.

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| **Action 2**:The XP drafts a concise, authentic message for each person, ready for the client's review. |
| **March 2: Client Review & Approval** |
| **Action**: The XP sends the report to the client with the three drafted messages.<br>● **For David (Birthday)**: *"Happy Birthday, David! 🎂 Hope you're celebrating big — let's grab dinner soon."*<br>● **For Samantha (New Baby)**: *"So thrilled for you and the little one, Samantha. Sending you and your family all the best in these first weeks."*<br>● **For Andre (Follow-up)**: *"Andre, just wanted to thank you again for the intro in Jan. Already had a great first call — really appreciate you."* |
| **Action:** The client spends 8 minutes reviewing the drafts, making one small wording tweak to Samantha's message before giving their approval. |
| **Throughout March: Scheduled Execution** |
| **Action 1:** With the messages approved, the XP uses a scheduling tool to ensure each message is delivered on the appropriate day. |
| **Action 2**: The XP updates the relationship tracker to log the new contact points, ensuring the system remains current for the next month's report. |
| **Final Result** |
| With less than 10 minutes of their own effort, the client appeared consistently thoughtful to three important people in their network. This proactive system strengthened key friendships and professional connections that might have otherwise been neglected. It effectively converted the client's limited time into high-value relationship capital. |

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## Hiring Engine

### High-Volume Candidate Sourcing

| Section | Details |
|---|---|
| **Protocol Title** | High-Volume Candidate Sourcing |
| **Purpose** | Save 40+ hours of recruiting time per role by automating high-volume, personalized outreach to massively expand the talent pipeline. |
| **Scope - What's Covered** | - Hiring for roles with a large potential talent pool (e.g., software engineers, sales representatives).<br>- Sourcing passive candidates who are not actively applying for jobs.<br>- Quickly building a large candidate pipeline at the beginning of a hiring process. |
| **Authority - XP Can Do Without Asking** | - Build a list of candidates that match the defined target profile.<br>- Send the approved outreach message to the entire list.<br>- Categorize replies and send a templated follow-up to interested candidates. |

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| **Exceptions - Must Confirm** | - The final message template before any outreach is sent.<br>- Any candidates who are a borderline fit for the target profile. |
| **Information & Tools Provided** | - Client provides the Target Profile, Sourcing Channel, and a draft message for each role.<br>- Access to the designated sourcing channel (e.g., LinkedIn Sales Navigator).<br>- A shared spreadsheet or Applicant Tracking System (ATS). |
| **Approval Thresholds** | N/A |
| **Preferred Communication & Frequency** | - XP provides a weekly "Candidate Pipeline Summary" to the client via their preferred channel. |
| **SOP - Step by Step** | 1. **Define Campaign:** Client provides the target profile, channel, and draft message for a specific role.<br>2. **Build List:** XP builds a comprehensive list of potential candidates in the shared tracker.<br>3. **Finalize & Approve Message:** XP refines the message template and gets final client approval.<br>4. **Execute Outreach:** XP systematically sends the personalized message to every contact on the list.<br>5. **Triage Replies:** XP monitors and categorizes all replies (e.g., "Interested," "Not Interested").<br>6. **Report Progress:** XP delivers the weekly "Candidate Pipeline Summary" to the client. |
| **Final Result** | The client generates a massive, qualified candidate pipeline with minimal personal time investment. Their time is spent talking to interested candidates, not searching for them. |
| **Agreement** | Client: _____________ XP: _____________ Date: _____________ |

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### Worked Example

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| **Scenario:** A hiring manager at a tech company needs to quickly build a large pipeline for a new Software Engineer II role. They ask their XP to run a high-volume outreach campaign to source passive candidates who fit a specific profile. |
| **Step 1: Define Campaign** |
| **Action**: The client provides the core details for the campaign to the XP.<br>● **Target Profile**: Software engineers with 3-5 years of experience using Python and AWS, preferably from other tech startups.<br>● **Sourcing Channel**: LinkedIn Sales Navigator.<br>● **Draft Message**: The client provides a brief, personalized message template for the initial outreach |
| **Step 2 & 3: Build List & Finalize Message** |
| **Action 1**: The XP uses LinkedIn Sales Navigator to build a list of **300 qualified candidates** who match the profile, adding them to the shared Applicant Tracking System (ATS). |

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| **Action 2**: The XP refines the draft message with personalization fields and gets final approval from the client before starting the outreach. |
| **Step 4 & 5: Execute Outreach & Triage Replies** |
| **Action 1:** The XP systematically sends the approved, personalized message to all 300 contacts on the list. |
| **Action 2**: As replies come in, the XP monitors the inbox and categorizes each response in the ATS (e.g., "Interested," "Not Interested"). |
| **Step 6: Report Progress** |
| **Action:** At the end of the week, the XP sends the "Candidate Pipeline Summary" to the client via Slack.<br>**Template Used:**<br>Sourcing Update for Software Engineer II: Week of Sept 8<br>Outreach Sent: 300 Responses<br>Received: 85<br>Interested Candidates:22<br>Note: The full list of interested candidates is in the ATS for your review. |
| **Final Result** |
| In one week, the client generated a pipeline of 22 interested and qualified candidates. They saved dozens of hours of manual sourcing and can now spend their time on high-value interviews instead of searching for prospects. |

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# Smart Reader

## Book-to-Action Playbook

| Section | Details |
|---|---|
| **Protocol Title** | Book-to-Action Playbook |
| **Purpose** | Turn books into personalized playbooks with clear, actionable steps. |
| **Scope – What's Covered** | - Non-fiction (health, business, leadership, productivity).<br>- Example: *Outlive* by Peter Attia. |
| **Authority – XP Can Do Without Asking** | - Read/scan book.<br>- Extract key ideas + actions.<br>- Draft 1-pager playbook. |

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| **Exceptions – Must Confirm** | - Books >500 pages.<br>- Topics outside client's interests. |
| **Information & Tools Provided** | - Client's reading list.<br>- Playbook template (PDF/Notion). |
| **Approval Thresholds** | N/A |
| **Preferred Communication & Frequency** | Deliver playbook via Slack/Notion. Review top 2–3 items in weekly call. |
| **SOP – Step by Step** | 1. Receive book request → XP logs.<br>2. Extract 10 key ideas.<br>3. Translate into "What to do differently this week."<br>4. Deliver 1-pager.<br>5. Review with client. |
| **Final Result** | Client gets a **personalized operating manual** from each book with clear next steps. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

### Worked Example

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| **Scenario:** The client, an entrepreneur, has just finished reading The E-Myth Revisited and is inspired to systemize their business. They ask their XP to create a concise, actionable playbook to help them apply the book's core principles. |
| **Step 1: Book Request Received** |
| **Action:** The client sends a Slack message: "I just finished *The E-Myth Revisited*. Can you create an action playbook for it?" The XP logs the request. |
| **Step 2 & 3: Extract & Translate** |
| **Action:** The XP scans the book and extracts its 10 key ideas. They then translate them into personalized, actionable steps for the client, such as:<br>● **Idea**: Work *on* your business, not just *in* it. → **Action**: "This week, block one 60-minute 'Strategic Thinking' session on your calendar."<br>● **Idea**: Document a core process. → **Action**: "This week, spend 30 minutes documenting the exact steps for onboarding a new client."<br>● **Idea**: Define roles clearly. → **Action**: "This week, create a simple org chart with one primary accountability for each role. |
| **Step 4: Deliver 1-Pager** |
| **Action**: The XP populates these action items into the 1-page playbook template and delivers it to the client via Notion. |
| **Step 5: Review with Client** |
| **Action**: During their weekly call, the XP and client briefly review the top 2-3 action items to ensure they are clear and practical for the week ahead. |

| Final Result |
| --- |
| The client receives a **personalized operating manual** for *The E-Myth Revisited*. Instead of abstract concepts, they have a simple, 1-page guide with clear next steps. This process transforms the client's passive reading into active, strategic work on their business.. |

## Custom Podcasts

| Section | Details |
| --- | --- |
| **Protocol Title** | 10-Minute Podcasts |
| **Purpose** | Provide quick, digestible book reports with actionable takeaways. |
| **Scope – What's Covered** | - Business, leadership, health, personal development books.<br>- <10 minutes to read. |
| **Authority – XP Can Do Without Asking** | - Condense book into <500 words.<br>- Provide "3 Key Takeaways" + "3 Actions." |
| **Exceptions – Must Confirm** | - Fiction or creative writing. |
| **Information & Tools Provided** | - Client's interest tracker.<br>- Blinkest template. |
| **Approval Thresholds** | N/A |
| **Preferred Communication & Frequency** | Deliver as PDF/Slack. Add to client's Blinkest Library. |
| **SOP – Step by Step** | 1. Receive title → XP confirms.<br>2. Summarize in <500 words.<br>3. Extract 3 key actions.<br>4. Deliver summary.<br>5. Log into library. |
| **Final Result** | Every book is **digestible in 10 minutes** and tied to clear actions. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

### Worked Example

**Scenario:** The client, a CEO, wants to understand the key principles from the book The Culture Code by Daniel Coyle but doesn't have time to read it. They ask their XP to create a 10-minute summary with actionable takeaways they can apply to their team.

| Step 1: Receive Book Request |
|---|
| **Action**: The client provides the core details for the campaign to the XP.<br>● **Target Profile**: Software engineers with 3-5 years of experience using Python and AWS, preferably from other tech startups.<br>● **Sourcing Channel**: LinkedIn Sales Navigator.<br>● **Draft Message**: The client provides a brief, personalized message template for the initial outreach |
| **Step 2 & 3: Summarize & Extract Actions** |
| **Action 1**: The XP condenses the book's core ideas into a summary of under 500 words. |
| **Action 2**: The XP then extracts 3 key takeaways and translates them into 3 concrete actions:<br>● **Takeaway**: Build Safety. → **Action**: "This week, start one team meeting by asking each person to share one thing they learned outside of work."<br>● **Takeaway**: Share Vulnerability. → **Action**: "In your next 1:1, share a small, recent mistake you made and what you learned from it."<br>● **Takeaway**: Establish Purpose. → **Action**: "Draft a one-sentence mission statement for the Q4 product launch and share it with the team." |
| **Step 4 & 5: Deliver and Log** |
| **Action 1:** The XP formats the summary and actions into the provided template and delivers the PDF to the client via Slack. |
| **Action 2**: The XP uploads the PDF to the client's shared "Blinkest Library" for future reference. |
| **Final Result** |
| The client reads the summary in less than 10 minutes during their commute. Instead of just having a vague idea of the book, they have a clear understanding of its core principles and three specific, actionable steps they can take that week to improve their team's culture. |

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## Custom News Brief

| Section | Details |
|---|---|
| **Protocol Title** | Never Read the News Again |
| **Purpose** | Deliver a custom daily news digest tailored to client's interests. |
| **Scope – What's Covered** | - Global news, finance, health, tech, industry updates. |
| **Authority – XP Can Do Without Asking** | - Select 5–7 key stories daily.<br>- Summarize in 3–4 bullets per story.<br>- Include deep dive links. |

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| **Exceptions – Must Confirm** | - Political commentary or opinion pieces.<br>- Sensitive/controversial topics. |
| **Information & Tools Provided** | - Client's interest categories.<br>- Trusted source list (NYT, FT, WSJ, Economist, etc.). |
| **Approval Thresholds** | N/A |
| **Preferred Communication & Frequency** | Deliver via Slack/email **by 7:00 AM daily**. |
| **SOP – Step by Step** | 1. Curate daily feeds.<br>2. Select 5–7 key stories.<br>3. Summarize in bullets.<br>4. Deliver digest with links.<br>5. Log in News Digest Library. |
| **Final Result** | Client saves **1–2 hours/day** and stays informed without information overload. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

### Worked Example

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|---|
| **Scenario:** A client, a venture capitalist, needs to stay updated on technology, finance, and health tech but is overwhelmed by information. They ask their XP to create a custom news digest delivered every morning, pulling from their trusted sources (WSJ, FT, TechCrunch). |
| **Step 1 & 2: Curate Feeds & Select Stories (6:00 AM)** |
| **Action 1**: The XP begins the day by scanning the client's trusted news sources. |
| **Action 2:** The XP writes a concise 3-4 bullet point summary for each of the 5 stories. |
| **Step 3 & 4: Summarize, Link, & Deliver (6:45 AM)** |
| **Action 1**: The XP writes a concise 3-4 bullet point summary for each of the 5 stories.. |
| **Action 2**: The XP compiles the summaries into a clean digest, includes a "deep dive" link for each story, and delivers it to the client's Slack channel by 7:00 AM sharp.<br>**Sample Entry in the Digest: Nvidia Announces Record Earnings on AI Chip Demand (WSJ)** • The company's quarterly revenue exceeded analyst expectations by 15%, driven primarily by sales of its H100 GPU for AI data centers. • CEO Jensen Huang stated that demand continues to outstrip supply, signaling a sustained boom for the AI hardware sector. • The report has positively impacted the entire semiconductor market in pre-market trading. • **Deep Dive:** [Link to the WSJ article] |
| **Step 4 & 5: Execute Outreach & Triage Replies** |

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|---|
| **Action 1:** The XP systematically sends the approved, personalized message to all 300 contacts on the list. |
| **Action 2**: As replies come in, the XP monitors the inbox and categorizes each response in the ATS (e.g., "Interested," "Not Interested"). |
| **Step 5: Log in Library** |
| **Action:** The XP saves a copy of the day's digest to the shared "News Digest Library" in Notion for the client's archives |
| **Final Result** |
| The client starts their day with a 5-minute read that provides all the relevant industry news they need, with zero noise. They save over an hour of sifting through news sites themselves and are fully prepared for their morning meetings, avoiding information overload. |

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## Peer Learning Circles

| Section | Details |
|---|---|
| **Protocol Title** | Peer Learning Group |
| **Purpose** | Build structured peer learning cohorts with expert facilitation. |
| **Scope – What's Covered** | - Monthly/quarterly group sessions.<br>- Topics tailored to client (AI, wellness, leadership, investing, etc.). |
| **Authority – XP Can Do Without Asking** | - Form WhatsApp/Slack group.<br>- Source vetted expert (PhD/professional).<br>- Manage logistics. |
| **Exceptions – Must Confirm** | - Expert fees >$500/session.<br>- Groups >15 participants. |
| **Information & Tools Provided** | - Client interest survey.<br>- Expert sourcing network. |
| **Approval Thresholds** | - Up to $500/session → proceed.<br>- $500–$1,000 → notify client.<br>- Above $1,000 → explicit approval. |
| **Preferred Communication & Frequency** | Deliver session details via Slack/email. Provide recap after each session. |
| **SOP – Step by Step** | 1. Form peer group chat (5–10 peers).<br>2. Source expert + confirm client.<br>3. Schedule session.<br>4. Host 60–90 min expert-led session. |

| | |
|---|---|
| | 5. Deliver recap with 3 takeaways. |
| **Final Result** | Client participates in **expert-led peer learning**, building knowledge + community. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

### Worked Example

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|---|
| **Scenario:** A client wants to organize a small, expert-led session for their founder peer group. Based on a recent client interest survey, the chosen topic is "Practical Applications of AI for Startups." The goal is to create a valuable learning and community-building experience without the client having to manage any logistics. |
| **Step 1: Form Peer Group** |
| **Action**: The XP creates a "Founder AI Cohort" WhatsApp group with the **8 peers** the client wants to include. |
| **Step 2: Source Expert & Confirm** |
| **Action:** The XP sources a vetted expert—a former startup CTO with a PhD in applied AI. The expert's fee is $750 for a 90-minute session.<br>Action: Since the fee is between $500 and $1,000, the XP notifies the client before proceeding, as per the approval threshold. The client gives their approval. |
| **Step 3 & 4: Schedule & Host Session** |
| **Action 1:** The XP coordinates with the expert and the 9 participants to schedule the session, sending out a calendar invitation with a Zoom link. |
| **Action 2**: On the day of the event, the XP manages the logistics of the 90-minute expert-led session so the client and their peers can focus on learning. |
| **Step 5: Deliver Recap (Day after the session)** |
| **Action:** The XP delivers a concise recap to the WhatsApp group, summarizing the session's key takeaways.<br>Recap: Practical AI for Startups<br>Takeaway 1: Start with a small, well-defined business problem; don't try to "boil the ocean" with your first AI project.<br>Takeaway 2: Leverage pre-trained APIs from major providers before attempting to build custom models to save significant time and resources.<br>Takeaway 3: The quality of your training data is the single biggest predictor of success. Focus on clean, well-labeled data. |
| **Final Result** |
| The client and their peers participated in an expert-led peer learning session, gaining valuable, practical knowledge and strengthening their community. The entire process, from sourcing the expert to scheduling and summarizing the event, was handled by the XP, allowing the client to simply show up and learn. |

# Be A Better Boss

## First-Day Recognition

| Section | Details |
|---|---|
| **Protocol Title** | First-Day Recognition |
| **Purpose** | Ensure every new hire feels valued and welcomed on Day 1, boosting long-term engagement and retention. |
| **Scope – What's Covered** | - New employee welcome (in-person or virtual).<br>- Personalized notes, introductions, and first-day touchpoints. |
| **Authority – XP Can Do Without Asking** | - Coordinate with recruiting team.<br>- Research new hire's interview highlights, interests, points of connection.<br>- Pre-draft personalized welcome notes or arrange first-day encounters. |
| **Exceptions – Must Confirm** | - Any personal details not publicly shared by the new hire.<br>- Scheduling 1:1 meetings beyond 15 minutes. |
| **Information & Tools Provided** | - Recruiting team highlights<br>- Onboarding calendar |
| **Approval Thresholds** | N/A |
| **Preferred Communication & Frequency** | - XP drafts Slack/email welcome notes for review.<br>- Updates client on new hire arrivals 1 week prior. |
| **SOP – Step by Step** | 1. **T-1 Week** → XP confirms new hire details with recruiting.<br>2. **T-3 Days** → Draft welcome note + gather conversation starters.<br>3. **Day-Of** → Deliver note (Slack/email) or arrange office introduction.<br>4. **Optional** → Schedule 15-min coffee chat.<br>5. **Post** → XP logs recognition in onboarding tracker. |
| **Final Result** | New hires feel personally seen and welcomed, improving retention and engagement. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

### Worked Example

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|---|
| **Scenario:** A new hire, Maria Gonzalez, joins the Product team remotely. |
| **T-1 Week** |

| |
|---|
| **Action 1**: XP checks with recruiting → learns Maria is passionate about climbing, speaks Spanish, and wowed interviewers with her customer-centric thinking.. |
| **Action 2:** XP drafts Slack post:<br>"Please welcome Maria Gonzalez to the Product team! 🎉 She joins us from Salesforce, where she led customer success initiatives. Outside of work, she's a passionate climber and coffee connoisseur—ask her about the best espresso in town!" |
| **T-3 Days** |
| **Action:** XP shares draft with client for a quick review → client approves in 2 minutes. |
| **Day-Of** |
| **Action:** Client posts the welcome note to the #product Slack channel. XP schedules a 15-minute virtual coffee chat for the client + Maria at 4pm. |
| **Post-Event** |
| **Action:** XP logs action in onboarding tracker: "Maria welcomed on Day 1 with personal note + 1:1." |
| **Final Result** |
| Maria feels seen and celebrated, contributing to a smoother onboarding and stronger engagement. |

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## Team Recognition Ritual

| Section | Details |
|---|---|
| **Protocol Title** | Team Recognition Ritual |
| **Purpose** | Build a culture of appreciation and recognition to strengthen motivation and team performance. |
| **Scope – What's Covered** | - Weekly/monthly recognition moments.<br>- Pre-drafted thank-you notes, shout-outs, and milestone recognitions. |
| **Authority – XP Can Do Without Asking** | - Draft 3–5 recognition notes weekly.<br>- Suggest individuals/events worthy of public recognition. |
| **Exceptions – Must Confirm** | - Any recognition involving sensitive/confidential projects. |
| **Information & Tools Provided** | - Team roster.<br>- Project tracker.<br>- Client's voice/style guide. |
| **Approval Thresholds** | N/A |

| | |
|---|---|
| **Preferred Communication & Frequency** | - XP sends draft recognition notes every Friday.<br>- Client edits/approves in <10 minutes. |
| **SOP – Step by Step** | 1. **Weekly** → XP reviews team activity + identifies wins.<br>2. Draft 3–5 recognition notes/shout-outs.<br>3. Client tweaks/approves in 10 min.<br>4. Send via Slack/email/team meeting.<br>5. XP logs recognitions in tracker for visibility. |
| **Final Result** | Team receives consistent, authentic recognition → stronger morale + 3x higher likelihood of exceeding targets. |
| **Supporting Stat** | "Employees who receive regular recognition are 3x more likely to be highly engaged and productive." – McKinsey & Company |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

### Worked Example

| |
|---|
| **Scenario:** The Engineering team just shipped a new internal tool two weeks early. |
| **Weekly Review** |
| **Action 1**: XP checks with recruiting → learns Maria is passionate about climbing, speaks Spanish, and wowed interviewers with her customer-centric thinking.. |
| **Action 2:** XP checks project tracker → sees Engineering milestone hit early. XP drafts 3 recognition messages:<br>Slack shout-out:<br>"Big thanks to the Eng team for launching the resource tracker 2 weeks early 🙌—already saving us time daily."<br>1. Personal note to Sarah (tech lead):<br>"Sarah, your leadership made the difference—thank you for guiding the team so smoothly."<br>2. Thank-you email to the full squad. |
| **Friday Approval** |
| **Action:** Client posts Slack shout-out at team meeting start. Emails go out same day. |
| **Post-Event** |
| **Action:** XP logs recognitions in tracker: "Eng team recognized for early delivery (Feb 2025)." |
| **Post-Event** |
| **Action:** XP logs action in onboarding tracker: "Maria welcomed on Day 1 with personal note + 1:1." |
| **Final Result** |

| |
|---|
| Team feels valued for their effort, morale is high, and culture of appreciation reinforced. |

# Live the Next Version of You

# Sleep Reset

## Night Nanny

| Section | Details |
|---|---|
| **Protocol Title** | Night Nanny |
| **Purpose** | Allow parents to rest while XP remotely supports children's bedtime and night routines. |
| **Scope – What's Covered** | - Remote supervision via Zoom or networked camera.<br>- Bedtime routine support (reading, calm-down activities).<br>- Emergency alert system if escalation needed. |
| **Authority – XP Can Do Without Asking** | - Set up nightly Zoom session.<br>- Read to child, keep routine on schedule.<br>- Call via "Freedom Phone" if escalation is needed. |
| **Exceptions – Must Confirm** | - Any physical in-person care.<br>- Medical decisions. |
| **Information & Tools Provided** | - Freedom Phone setup.<br>- Child's bedtime routine + preferences.<br>- Camera/Zoom access. |
| **Approval Thresholds** | N/A |
| **Preferred Communication & Frequency** | - Daily check-in at bedtime.<br>- Slack/phone alert if child cannot be calmed. |
| **SOP – Step by Step** | 1. Schedule nightly Zoom session.<br>2. Guide child through bedtime routine.<br>3. Optional: reading time (child reads aloud).<br>4. Monitor via camera.<br>5. Call parent via Freedom Phone if escalation needed. |
| **Final Result** | Kids go to bed on time; parents sleep without worry. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

**Worked Example**

- Bedtime: 7:30pm. XP logs on via Zoom at 7:15.
- Child reads 20 minutes from *Charlotte's Web*. XP encourages.
- Lights out by 8:20.
- 8:40 fussing → XP waits 10 minutes, resolves. No escalation.
- Parent evening is uninterrupted.

---

## Sleep Score Scheduling Protocol

| Section | Details |
|---|---|
| **Protocol Title** | Sleep Score Scheduling |
| **Purpose** | Optimize daily schedule based on real-time sleep data. |
| **Scope – What's Covered** | - Daily sync with client's sleep tracking app (Oura, Whoop, etc.).<br>- Adjust meetings, workouts, and deep work blocks. |
| **Authority – XP Can Do Without Asking** | - Reschedule non-essential meetings if sleep score is low.<br>- Prioritize deep work/workouts if score is high. |
| **Exceptions – Must Confirm** | - Canceling client-facing external meetings. |
| **Information & Tools Provided** | - Access to sleep app.<br>- Calendar access.<br>- List of flexible vs. non-flexible commitments. |
| **Approval Thresholds** | N/A |
| **Preferred Communication & Frequency** | - Daily 6:30am Slack update with plan adjustments. |
| **SOP – Step by Step** | 1. Sync sleep score at 6:00am.<br>2. If low → move non-essential meetings, shorten day.<br>3. If high → add deep work, workout, or stretch goals.<br>4. Update calendar by 6:30am.<br>5. Notify client with adjusted plan. |
| **Final Result** | Client's energy is matched to the right work and recovery daily. |

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| **Agreement** | Client: ______ XP: ______ Date: ______ |

Worked Sample

6:00 AM: Client's Oura ring reports a low sleep score of 65.
6:15 AM: XP syncs the data, postpones two non-essential internal meetings to the next day, and blocks a 30-minute recovery period in the afternoon calendar.
6:30 AM: Client receives a Slack update with their adjusted, lighter schedule, allowing them to prioritize recovery without missing critical work.

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## Jet Lag Minimizer Protocol

| Section | Details |
|---|---|
| **Protocol Title** | Jet Lag Minimizer |
| **Purpose** | Reduce travel fatigue by shifting routines pre- and post-trip. |
| **Scope – What's Covered** | - Adjust bedtime, wake time, meals, and light exposure before/after flights. |
| **Authority – XP Can Do Without Asking** | - Create personalized time-shift plan.<br>- Update calendar with new blocks. |
| **Exceptions – Must Confirm** | - Shifts >2 hours/day. |
| **Information & Tools Provided** | - Travel schedule.<br>- Client's preferred shift rules (e.g., 30 minutes earlier each night). |
| **Approval Thresholds** | N/A |
| **Preferred Communication & Frequency** | - Share Jet Lag Plan 7 days before trip. |
| **SOP – Step by Step** | 1. Receive travel itinerary.<br>2. Build time-shift schedule (bed, meals, workouts).<br>3. Update client's calendar.<br>4. Remind daily with adjusted routine.<br>5. Post-trip → adjust back. |
| **Final Result** | Client adapts quickly and avoids major jet lag symptoms. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

**Worked Example**

- Flight: NYC → London, March 14.
- XP plan: Shift bedtime 30 min earlier starting March 10. Meals adjusted + blocked AM light walks in London.
- Calendar updated. Daily reminders sent.
- Result: Client adjusted within 24 hours on arrival.

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## Smart Alarm Protocol

| Section | Details |
|---|---|
| **Protocol Title** | Smart Alarm |
| **Purpose** | Allow XP to remotely set, move, or cancel alarms based on sleep, schedule changes, or cancellations. |
| **Scope – What's Covered** | - Alarm management tied to schedule + sleep score. |
| **Authority – XP Can Do Without Asking** | - Set/cancel alarms within agreed hours. |
| **Exceptions – Must Confirm** | - Canceling alarms for immovable commitments (board calls, flights). |
| **Information & Tools Provided** | - Alarm app with XP control.<br>- Sleep score integration. |
| **Approval Thresholds** | N/A |
| **Preferred Communication & Frequency** | - Slack confirmation night before: "Alarm set for 6:30am tomorrow." |
| **SOP – Step by Step** | 1. Review next day's calendar at 8pm.<br>2. Cross-check with sleep score.<br>3. Set alarm accordingly.<br>4. Confirm with client.<br>5. Adjust if cancellations arise overnight. |
| **Final Result** | Client wakes up only when necessary, aligned with energy and schedule. |

| | |
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| **Agreement** | Client: ______ XP: ______ Date: ______ |

**Worked Example**

- Sleep Score: 62. Early 7am call canceled overnight.
- XP adjusts alarm from 6:00 → 7:45am.
- Slack message: "🔔 Adjusted alarm — call canceled, catch extra rest. New wake 7:45

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## Homework Buddy Protocol

| Section | Details |
|---|---|
| **Protocol Title** | Homework Buddy |
| **Purpose** | Support child's learning by making XP a consistent, patient tutor. |
| **Scope – What's Covered** | - After-school homework for elementary students.<br>- Reading, math, projects. |
| **Authority – XP Can Do Without Asking** | - Schedule homework block.<br>- Prepare materials/questions with ChatGPT. |
| **Exceptions – Must Confirm** | - Any high-stakes test prep requiring external tutor. |
| **Information & Tools Provided** | - School curriculum/homework access.<br>- Child's learning preferences. |
| **Approval Thresholds** | N/A |
| **Preferred Communication & Frequency** | - Daily homework sessions (Zoom or in-person if local).<br>- Weekly progress update to parent. |
| **SOP – Step by Step** | 1. XP receives homework list.<br>2. Prepare lesson plan + ChatGPT tutor prompts.<br>3. Schedule 30–45 min session.<br>4. Work with child patiently.<br>5. Share weekly summary with parent. |
| **Final Result** | Child develops homework habits and lifelong learning confidence. |

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| **Agreement** | Client: ______ XP: ______ Date: ______ |

**Worked Example**

- Subject: 4th grade fractions.
- XP sets up Zoom at 4:00pm.
- ChatGPT prompt: “Act as patient 4th grade tutor.”
- Child completes 90% of problems independently.
- Weekly summary: “✅ Fractions much stronger; next week focus on decimals.”

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## Nutrition Concierge Protocol

| Section | Details |
|---|---|
| **Protocol Title** | Nutrition Concierge |
| **Purpose** | Optimize energy, health, and longevity by automating nutrition decisions and routines. |
| **Scope – What’s Covered** | - Weekly meal planning.<br>- Grocery ordering or chef coordination.<br>- Tracking energy/mood outcomes. |
| **Authority – XP Can Do Without Asking** | - Build weekly menus with approved recipes.<br>- Place grocery/meal delivery orders up to $300. |
| **Exceptions – Must Confirm** | - Any diet shifts (e.g., fasting, supplements).<br>- Orders >$300/week. |
| **Information & Tools Provided** | - Client’s dietary preferences + restrictions.<br>- Access to grocery/meal services.<br>- Nutritionist guidelines or book (e.g., *Outlive*). |
| **Approval Thresholds** | - <$300 orders → proceed.<br>- $300–$600 → notify.<br>- >$600 → explicit approval. |
| **Preferred Communication & Frequency** | - Weekly menu shared Friday.<br>- Energy/mood log updates weekly. |
| **SOP – Step by Step** | 1. Draft weekly menu Friday.<br>2. Order groceries by Sunday.<br>3. Client follows meals.<br>4. XP logs outcomes (energy, mood). |

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| | 5. Monthly → refine menu based on patterns. |
| **Final Result** | Client eats healthfully without decisions, building a personalized nutrition operating system. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

**Worked Example – Week of March 10**

- Menu: Mediterranean focus, 3 breakfasts (overnight oats, Greek yogurt bowls, spinach omelets).
- Orders: $240 via Whole Foods + local fishmonger.
- Tracking: Client notes "high energy after protein lunches; sluggish after pasta dinners."
- Adjusted: Shift more protein-based meals for next week.

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## Peak Energy Calendar Protocol

| Section | Details |
|---|---|
| **Protocol Title** | Peak Energy Calendar |
| **Purpose** | Align work and life tasks with client's natural energy rhythms for maximum performance. |
| **Scope – What's Covered** | - Daily energy tracking.<br>- Calendar alignment (deep work vs. social vs. admin). |
| **Authority – XP Can Do Without Asking** | - Shift internal meetings.<br>- Move admin tasks to low-energy windows. |
| **Exceptions – Must Confirm** | - Moving investor/board/external meetings. |
| **Information & Tools Provided** | - Energy self-report or wearables (Oura, Whoop).<br>- Full calendar access. |
| **Approval Thresholds** | - Internal moves → proceed.<br>- External moves → explicit approval. |
| **Preferred Communication & Frequency** | - Weekly energy calendar shared Sunday. |
| **SOP – Step by Step** | 1. Track daily energy via app/self-report.<br>2. Map energy highs/lows.<br>3. Build weekly energy calendar. |

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| | 4. Update schedule accordingly.<br>5. Share summary + adjustments. |
| **Final Result** | Client consistently works at peak times, rests at lows, reducing burnout. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

**Worked Example – Week of April 1**

- Pattern: Peak focus = 9–11am; slump = 2–3pm.
- Adjustments: XP moved team syncs → 2pm slump window. Reserved 9–11am for deep strategy work.
- Result: Client reports "2x productivity on key projects."

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## Family Historian Protocol

| Section | Details |
|---|---|
| **Protocol Title** | Family Historian |
| **Purpose** | Capture, curate, and preserve family stories and memories into a living archive. |
| **Scope – What's Covered** | - Collect photos, quotes, videos weekly.<br>- Create quarterly "Family Magazine."<br>- Create annual yearbook/video montage. |
| **Authority – XP Can Do Without Asking** | - Collect media from cloud/photo stream.<br>- Edit into templates (Canva, Shutterfly). |
| **Exceptions – Must Confirm** | - Sharing family media outside private channels. |
| **Information & Tools Provided** | - Access to family photo stream.<br>- Tools for editing/printing. |
| **Approval Thresholds** | <$500/year in print media → proceed. |
| **Preferred Communication & Frequency** | - Weekly collection.<br>- Quarterly magazine.<br>- Annual book/video. |
| **SOP – Step by Step** | 1. Collect weekly photos/quotes.<br>2. Curate into "Family Highlights." |

| | |
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| | 3. Quarterly → design digital magazine.<br>4. Annually → print book or create montage.<br>5. Share + archive securely. |
| **Final Result** | Family history professionally documented; children inherit a living archive. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

**Worked Example – Q1 2025**

- Collected: Vacation photos, kid's soccer win, quote: "Dad, you're my coach now."
- Output: 15-page Canva magazine ("Winter 2025 Highlights").
- Delivery: Shared PDF, ordered 5 printed copies.
- Result: Family delighted, tradition established.

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## Decision Offloading Protocol

| Section | Details |
|---|---|
| **Protocol Title** | Decision Offloading |
| **Purpose** | Eliminate decision fatigue by outsourcing low-value daily choices. |
| **Scope – What's Covered** | - Clothing selection.<br>- Meal ordering.<br>- Transportation routes. |
| **Authority – XP Can Do Without Asking** | - Pre-select wardrobe, meals, routes.<br>- Set daily defaults. |
| **Exceptions – Must Confirm** | - Special events (board meeting attire).<br>- Restaurant choices >$200. |
| **Information & Tools Provided** | - Wardrobe inventory.<br>- Favorite restaurants + delivery apps.<br>- Calendar. |
| **Approval Thresholds** | <$200 meals → proceed. |
| **Preferred Communication & Frequency** | - Daily Slack message with 3 decisions pre-made. |

| | |
|---|---|
| **SOP – Step by Step** | 1. Review client's day.<br>2. Pre-select outfit, meals, and route.<br>3. Deliver 7am "Daily Decision Sheet."<br>4. Client follows defaults.<br>5. Weekly → adjust based on feedback. |
| **Final Result** | Client conserves willpower for strategic choices; daily friction eliminated. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

**Worked Example – May 5 Daily Decision Sheet**

- Outfit: Navy blazer, white shirt, grey chinos.
- Lunch: Sweetgreen Warm Harvest Bowl, delivered 12:15.
- Commute: Lyft reserved for 8:30am → fastest route per Waze.
- Client time saved: ~25 minutes + reduced stress.

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# Money Check

The Recurring Cost & Subscription Audit

| Section | Details |
|---|---|
| **Protocol Title** | The Recurring Cost & Subscription Audit |
| **Purpose** | Save hundreds or thousands of dollars per year and declutter finances by identifying unused subscriptions, negotiating better rates, and optimizing memberships. |
| **Scope - What's Covered** | - Identifying all recurring monthly and annual expenses<br>- Finding and cancelling unused paid services and apps<br>- Proactively negotiating lower rates on regular bills (internet, cell phone, insurance).- Performing an annual financial health check-up. |
| **Authority - XP Can Do Without Asking** | - Review financial statements to compile a list of all recurring costs<br>- Propose a list of subscriptions for cancellation based on pre-defined rules.<br>- Call providers to negotiate better rates (with prior authorization). |
| **Exceptions - Must Confirm** | - The final list of which specific subscriptions to cancel.<br>- Any negotiation outcome that significantly changes service terms. |
| **Information & Tools Provided** | - Secure, read-only access to 1-2 months of financial statements. |

| | |
|---|---|
| | - Client's rules for cancellations (e.g., "cancel if unused for 3 months").<br>- A shared spreadsheet for tracking audit results. |
| **Approval Thresholds** | N/A |
| **Preferred Communication & Frequency** | - XP sends the "Subscription Audit Report" for client review and approval.<br>- XP sends the "Final Savings Summary" upon completion of the audit. |
| **SOP - Step by Step** | 1. **Review Statements:** Securely review financial statements and list all recurring charges in a tracker.<br>2. **Propose Cancellations:** Present a "Subscription Audit Report," flagging unused services for cancellation.<br>3. **Execute Changes:** After client approval, cancel subscriptions and negotiate with providers for better rates.<br>4. **Optimize:** Research and apply any available discounts from existing memberships.<br>5. **Report Savings:** Deliver the "Final Savings Summary," detailing all actions taken and the total amount saved. |
| **Final Result** | The client's recurring expenses are minimized, and their finances are decluttered without them spending hours on the phone with providers. They save real money and gain peace of mind knowing they are only paying for what they truly use. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

### Worked Sample

Following the quarterly audit, the XP sent the client the final summary report:

- **Actions Taken**:
  - Cancelled 3 unused subscriptions (MasterClass, The Athletic, an old SaaS tool).
  - Negotiated a 20% discount on the Comcast internet bill.
- **Total Savings**: **$75/month** (which is **$900/year**).

---

## 800+ Credit Score Protocol

| Section | Details |
|---|---|
| **Protocol Title** | 800+ Credit Score |
| **Purpose** | Maintain or build an excellent credit score to unlock better loan rates, rewards, and financial security. |
| **Scope – What’s Covered** | - Monthly credit score monitoring.<br>- On-time bill payment system.<br>- Credit utilization check + reminders. |

| | |
|---|---|
| **Authority – XP Can Do Without Asking** | - Check credit monitoring tools.<br>- Draft reminders and score updates.<br>- Suggest routine actions (e.g., pay card twice/month). |
| **Exceptions – Must Confirm** | - Applying for new credit cards or loans.<br>- Any balance transfers. |
| **Information & Tools Provided** | - Credit monitoring access (Experian, Credit Karma).<br>- Client's bill payment schedule. |
| **Approval Thresholds** | - Monitoring + reminders → proceed.<br>- Any new account or credit action → explicit client approval. |
| **Preferred Communication & Frequency** | - Monthly "Credit Health Report" via Slack/Notion. |
| **SOP – Step by Step** | 1. Check monthly credit score + factors.<br>2. Flag risks (utilization >30%, late bills).<br>3. Draft 2–3 recommended actions.<br>4. Deliver "Credit Health Report."<br>5. Log month-over-month progress. |
| **Final Result** | Client keeps score >800 with zero effort, unlocking perks + peace of mind. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

Worked Sample

- Score: 805 → 812.
- Flag: Utilization on Amex = 32%.
- Action: Pay down $1,200 mid-cycle.
- XP note: "✅ Mid-cycle payment done, utilization now 18%."

---

### Monthly Expense Audit Protocol

| Section | Details |
|---|---|
| **Protocol Title** | Monthly Expense Audit |
| **Purpose** | Eliminate wasteful spending and keep client financially sharp. |
| **Scope – What's Covered** | - Monthly review of all card/bank statements. |

| | |
|---|---|
| | - Categorize spending.<br>- Flag anomalies or waste. |
| **Authority – XP Can Do Without Asking** | - Review statements.<br>- Flag + highlight unnecessary expenses. |
| **Exceptions – Must Confirm** | - Canceling or changing recurring services. |
| **Information & Tools Provided** | - Bank + credit card access.<br>- Shared Google Sheet/Notion tracker. |
| **Approval Thresholds** | - Flagging waste → proceed.<br>- Canceling/moving accounts → client approval. |
| **Preferred Communication & Frequency** | - Monthly "Expense Audit Report." |
| **SOP – Step by Step** | 1. Pull monthly statements.<br>2. Categorize by type (housing, travel, dining, misc).<br>3. Flag 3–5 waste areas.<br>4. Deliver report with "Cut/Keep" suggestions.<br>5. Track changes month-over-month. |
| **Final Result** | Client trims waste and stays financially aware without tedious reviews. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

### Worked Sample

- Spend: $12,450.
- Flags: $280 unused SaaS licenses, $190 duplicate Amazon orders, $90 gym not visited.
- Savings Action: Cancel SaaS + gym → $370/month saved.

---

## Subscription Detox Protocol

| Section | Details |
|---|---|
| **Protocol Title** | Subscription Detox |
| **Purpose** | Remove unnecessary recurring costs and optimize active subscriptions. |
| **Scope – What's Covered** | - Audit subscriptions quarterly. |

| | |
|---|---|
| | - Cancel unused or duplicate plans.<br>- Maintain tracker. |
| **Authority – XP Can Do Without Asking** | - Identify + cancel subscriptions under $50/month if unused 60+ days. |
| **Exceptions – Must Confirm** | - Canceling subscriptions over $50/month.<br>- Business-critical services. |
| **Information & Tools Provided** | - Subscription logins.<br>- Expense tracker. |
| **Approval Thresholds** | - <$50/month unused → XP cancels.<br>- $50–$200/month → notify.<br>- >$200/month → explicit approval. |
| **Preferred Communication & Frequency** | - Quarterly subscription report. |
| **SOP – Step by Step** | 1. Pull active subscriptions list.<br>2. Flag unused/duplicates.<br>3. Cancel per thresholds.<br>4. Update tracker.<br>5. Share quarterly savings. |
| **Final Result** | Client saves $1,000s/year with no subscription creep. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

Worked Sample **– Q1 Detox**

- Found: Unused Dropbox Business $20/mo, duplicate Disney+ $11/mo.
- Cancelled → $372/year saved.
- Report: "✅ Cancelled 2 subs, $372 annual savings. Current active subs: 18."

---

## Subscription & Plan Discounts Protocol

| Section | Details |
|---|---|
| **Protocol Title** | Subscription & Plan Discounts |
| **Purpose** | Stop paying full price—systematically negotiate discounts and optimize plans. |

| | |
|---|---|
| **Scope – What's Covered** | - Internet, phone, SaaS, streaming, gyms.<br>- Call providers semi-annually to request deals. |
| **Authority – XP Can Do Without Asking** | - Call vendors to negotiate discounts up to 20%.<br>- Switch plans within same provider. |
| **Exceptions – Must Confirm** | - Switching to new vendors.<br>- Contracts requiring termination fees. |
| **Information & Tools Provided** | - List of subscriptions.<br>- Secure payment info. |
| **Approval Thresholds** | - Discounts/switches within same provider → proceed.<br>- New vendors or contracts → explicit approval. |
| **Preferred Communication & Frequency** | - Bi-annual "Discount Report" with savings logged. |
| **SOP – Step by Step** | 1. Every 6 months, XP reviews all plans.<br>2. Call providers to request discounts.<br>3. Apply new promo codes/rates.<br>4. Document savings in tracker.<br>5. Deliver "Discount Report." |
| **Final Result** | Client consistently pays the lowest available rates without effort. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

Worked Sample - **March Discounts**

- Comcast bill: reduced from $125 → $99/mo ($312/year saved).
- NYT Digital: switched to promo rate $5/mo ($96/year saved).

- Total Savings: $408/year.

---

## Influence Map

### Personal CRM Protocol

| Section | Details |
|---|---|
| **Protocol Title** | Personal CRM |

| | |
|---|---|
| **Purpose** | Build and maintain a living database of personal and professional relationships to enable consistent, thoughtful outreach. |
| **Scope – What's Covered** | - Import contacts from LinkedIn, email, and social platforms into Clay (or equivalent CRM).<br>- Track birthdays, career updates, last contact, and notes.<br>- Suggest engagement opportunities (congrats, articles, intros). |
| **Authority – XP Can Do Without Asking** | - Maintain CRM entries.<br>- Propose 5–10 engagement opportunities weekly.<br>- Draft sample messages in client's voice. |
| **Exceptions – Must Confirm** | - Adding new contacts from sensitive/private contexts.<br>- Suggesting introductions with potential conflicts. |
| **Information & Tools Provided** | - Client's LinkedIn, Clay login.<br>- Calendar access for birthdays.<br>- Client's preferred messaging style. |
| **Approval Thresholds** | - CRM updates/notes → proceed.<br>- Intros to 3rd parties → explicit approval required. |
| **Preferred Communication & Frequency** | - Weekly "CRM Highlights" via Slack/Notion. |
| **SOP – Step by Step** | 1. Import LinkedIn + contacts into Clay.<br>2. Clean data (dedupe, add notes).<br>3. Tag contacts by category (close friends, peers, mentors, prospects).<br>4. Identify 5–10 opportunities weekly.<br>5. Draft suggested messages.<br>6. Share "CRM Highlights" with client. |
| **Final Result** | Client has a **personalized, dynamic CRM** with curated outreach ideas weekly. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

Worked Example

February CRM Highlights

- **CRM Entry:** *Sarah Kim* → Promotion at Bain (from LinkedIn).
- **Engagement Idea:** "Congrats on the promotion! No surprise at all—hope to celebrate soon."
- **CRM Entry:** *David Chen* → Published op-ed in HBR.

- **Engagement Idea:** “Just read your HBR piece—brilliant as always. Sharing it with my team.”
- **Delivery:** XP shares weekly report → client sends both in 3 minutes.
- **Result:** Client stays top-of-mind with two meaningful touches, no admin work

---

### Personal Touchpoint Ritual

| Section | Details |
|---|---|
| **Protocol Title** | Personal Touchpoint Ritual |
| **Purpose** | Build trust and connection through consistent micro-touchpoints (birthdays, anniversaries, random check-ins). |
| **Scope – What's Covered** | - Birthday notes.<br>- Random two-line check-ins.<br>- Short texts for milestones (promotion, new city, etc.). |
| **Authority – XP Can Do Without Asking** | - Draft 10 personalized micro-messages daily.<br>- Pre-load into iMessage/WhatsApp for easy client send. |
| **Exceptions – Must Confirm** | - Sensitive life events (illness, condolence). |
| **Information & Tools Provided** | - Contact lists (Facebook, phone, CRM).<br>- Categories (close friends, acquaintances, colleagues).<br>- Client's voice/tone preferences. |
| **Approval Thresholds** | - All messages pre-drafted → client must approve by sending. |
| **Preferred Communication & Frequency** | - XP delivers 10 pre-drafted texts daily in Slack/Notion. |
| **SOP – Step by Step** | 1. Update contact calendar monthly.<br>2. Draft 10 micro-messages per day.<br>3. Pre-load into messaging platform.<br>4. Client reviews + sends (5 minutes).<br>5. XP logs outreach in tracker. |
| **Final Result** | Client maintains steady, authentic presence in 100+ relationships yearly—trust built over time. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

### Worked Example

**March 3 Touchpoints**

- **Birthday (Emily R.)**: Draft text → "Happy Birthday Emily! 🎂 Hope today's filled with joy and laughter—celebrating you from afar."
- **Random Check-In (James T.)**: Draft text → "James, thought of you when I saw that new AI release. How's the startup going?"
- **Promotion (Priya S.)**: Draft text → "Congrats on the new role, Priya! So well deserved—let's catch up soon."
- **Execution:** Client reviews/sends in 5 minutes.
  **Result:** 3 strong touchpoints → strengthens friendships + expands relational equity.

---

## Give First Protocol

| Section | Details |
|---|---|
| **Protocol Title** | Give First Protocol |
| **Purpose** | Strengthen relationships by consistently offering value first—through introductions, resources, or opportunities—so the client becomes known as a generous connector. |
| **Scope – What's Covered** | - Warm introductions.<br>- Sharing resources (articles, podcasts, tools).<br>- Passing along relevant opportunities (speaking, jobs, investments). |
| **Authority – XP Can Do Without Asking** | - Identify 3–5 "give first" opportunities weekly.<br>- Draft intro/resource notes in client's tone. |
| **Exceptions – Must Confirm** | - Intros involving board members, investors, or highly sensitive relationships.<br>- Opportunities with potential conflicts. |
| **Information & Tools Provided** | - Client's personal CRM (Clay/LinkedIn).<br>- Content feeds (HBR, McKinsey, industry newsletters).<br>- Client's resource preferences (articles, books, podcasts). |
| **Approval Thresholds** | - Routine intros/resources → proceed with client review.<br>- VIP-level introductions → explicit client approval. |
| **Preferred Communication & Frequency** | - Weekly "Give First" briefing via Slack/Notion (list of suggested intros/resources). |
| **SOP – Step by Step** | 1. **Weekly** → XP reviews CRM + news feeds.<br>2. Identify 3–5 opportunities to add value (intro, resource, invite). |

| | |
|---|---|
| | 3. Draft notes in client's voice.<br>4. Share "Give First" briefing with client.<br>5. Client approves/edits in <10 minutes.<br>6. XP sends/schedules approved outreach + logs in tracker. |
| **Final Result** | Client consistently adds value in their network → reputation as a trusted connector compounds. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |
| **Protocol Title** | Give First Protocol |

### Worked Example

March 7 "Give First" Briefing

- **Intro Opportunity:**
  - *Alex Chen* (early-stage founder) → *Priya S.* (angel investor).
  - Draft note: "Priya, meet Alex—building in AI healthcare. Alex, Priya's been supporting founders in your space for years."

- **Resource Share:**
  - *To Jordan L.* (CMO contact).
    Draft note: "Saw this McKinsey piece on Gen Z marketing—thought of you. Curious how it aligns with what you're seeing."

- **Opportunity Share:**
  - *To Samantha R.* (friend exploring speaking).
  - Draft note: "Spotted this panel on women in tech leadership. Would you like me to nominate you?"

**Execution:** Client approves in 8 minutes. XP sends messages + logs them.
**Result:** 3 touchpoints → client strengthens ties across investors, peers, and friends with zero admin load.

---

# Family Time

## Date Night Protocol

| Section | Details |
|---|---|
| **Protocol Title** | Date Night Protocol |
| **Purpose** | Ensure consistent quality time with partner through effortless, well-planned date nights/lunches/activities. |

| | |
|---|---|
| **Scope – What's Covered** | - At least 1 date night or day activity monthly.<br>- XP handles all logistics: reservations, childcare, payments, reminders. |
| **Authority – XP Can Do Without Asking** | - Book activities/restaurants up to $300.<br>- Arrange childcare from pre-approved list.<br>- Track what works/what doesn't for future planning. |
| **Exceptions – Must Confirm** | - Activities >$300.<br>- Any new childcare provider not on approved list. |
| **Information & Tools Provided** | - Shared calendar access.<br>- List of childcare providers.<br>- Payment card in 1Password. |
| **Approval Thresholds** | - Up to $300 → XP proceeds.<br>- $300–$600 → Notify client.<br>- >$600 → Explicit approval. |
| **Preferred Communication & Frequency** | - Monthly proposal of 2–3 options.<br>- Confirmed event added to shared calendar + Slack reminder 3 days prior. |
| **SOP – Step by Step** | 1. **T-4 Weeks** → XP proposes 2–3 activities with budget + logistics.<br>2. **T-3 Weeks** → Client confirms choice.<br>3. **T-2 Weeks** → XP books venue/activity + childcare.<br>4. **T-3 Days** → XP sends Slack reminder with itinerary.<br>5. **Post-Date** → XP logs "works/doesn't work" notes in Date Night Tracker. |
| **Final Result** | Partner feels prioritized, client enjoys stress-free quality time. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

### Worked Example

March Date Night

- **Options Proposed:** Italian dinner at Via Matta, cooking class, or jazz show.
- **Client Picked:** Jazz show.
- **Logistics:** XP booked tickets ($220), reserved pre-show dinner ($120), booked babysitter (8–11pm).
- **Execution:** Slack reminder 3 days prior: "🎶 Jazz night this Sat! Dinner 6:30pm, show 8pm, sitter confirmed."
- **Result:** Client + partner enjoyed seamless evening. XP logged "live music = great, late nights less ideal."

Weekend Wonder Protocol

| Section | Details |
|---|---|
| **Protocol Title** | Weekend Wonder Protocol |
| **Purpose** | Design one "perfect day" each week for family joy, novelty, and connection. |
| **Scope – What's Covered** | - Saturday or Sunday.<br>- 100% planned: events, meals, travel time.<br>- Local/tourist-in-your-own-city activities. |
| **Authority – XP Can Do Without Asking** | - Propose and book local activities within 60-minute drive.<br>- Reserve restaurants and tickets up to $400 total. |
| **Exceptions – Must Confirm** | - Day trips requiring flights/hotels.<br>- Activities >$400. |
| **Information & Tools Provided** | - Client's family preferences + dietary restrictions.<br>- Budget + distance threshold. |
| **Approval Thresholds** | - Up to $400 → proceed.<br>- $400–$800 → Notify client.<br>- >$800 → Explicit approval. |
| **Preferred Communication & Frequency** | - Weekly plan sent every Wednesday.<br>- Full itinerary (minute-by-minute) in shared calendar + Slack. |
| **SOP – Step by Step** | 1. **T-1 Week (Wed)** → XP checks local events, drafts 2 itinerary options.<br>2. **T-5 Days (Fri)** → Client confirms choice.<br>3. **T-3 Days** → XP books meals, tickets, travel.<br>4. **Day-Of** → XP sends 9am Slack note: "📅 Your Weekend Wonder: see calendar for full plan."<br>5. **Post** → Log feedback: what family enjoyed, what to adjust. |
| **Final Result** | Family enjoys novel, curated experiences weekly → more joy, less planning burden. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

### Worked Example

**April Weekend Wonder**

- **Theme:** Tourist in your own city.
- **Plan:**
  - 9:00am → Breakfast at home (XP pre-ordered bakery box).
  - 10:30am → Visit new science museum exhibit (tickets booked).
  - 12:30pm → Picnic in park (XP arranged pre-packed basket).
  - 2:00pm → Family bike ride (XP rented bikes nearby).
  - 6:00pm → Dinner at casual family spot (reservation confirmed).

- **Execution:** XP calendarized every block, including travel. Slack message: "✅ Family Wonder Day ready—see calendar for details."
  **Result:** Family loved picnic + bikes, feedback logged: "keep outdoor focus, kids enjoyed hands-on exhibits."

---

## Milestone Memories Protocol

| Section | Details |
|---|---|
| **Protocol Title** | Milestone Memories |
| **Purpose** | Ensure every family/relationship milestone is celebrated thoughtfully, without client managing details. |
| **Scope – What's Covered** | - Anniversaries, birthdays, graduations, promotions.<br>- Surprise gestures (flowers, notes, framed photos). |
| **Authority – XP Can Do Without Asking** | - Order gifts, flowers, cards up to $300.<br>- Book reservations at favorite venues.<br>- Arrange delivery (cake, photos, keepsakes). |
| **Exceptions – Must Confirm** | - Any spend >$300.<br>- Travel-related celebrations. |
| **Information & Tools Provided** | - Family calendar of milestones.<br>- Approved vendor list (florists, gift sites, restaurants). |
| **Approval Thresholds** | - Up to $300 → proceed.<br>- $300–$750 → notify. |

| | |
|---|---|
| | - >$750 → explicit approval. |
| **Preferred Communication & Frequency** | - Monthly "Milestone Report" listing upcoming events. |
| **SOP – Step by Step** | 1. **T-1 Month** → XP reviews upcoming milestones.<br>2. Draft plan: gift, reservation, or gesture.<br>3. Confirm budget if >$300.<br>4. **T-2 Weeks** → Execute orders/bookings.<br>5. **Day-Of** → Send Slack reminder with details.<br>6. **Post** → Log what worked/didn't in tracker. |
| **Final Result** | Partner/kids never feel forgotten; milestones marked with thoughtful touches. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

Worked Example

**Anniversary**

- **Event:** 12th wedding anniversary, June 14.
- **Plan:** XP booked favorite Italian restaurant ($180), ordered bouquet delivery ($95), arranged childcare ($120).
- **Execution:** Slack reminder morning of: "💐 Dinner 7pm tonight, flowers delivered at 5pm, sitter arrives 6:30pm."
- **Result:** Partner delighted, client stress-free; XP logged "romantic dinners always a hit."

---

## Family Traditions Protocol

| Section | Details |
|---|---|
| **Protocol Title** | Family Traditions |
| **Purpose** | Build recurring family rituals (weekly, monthly, or quarterly) that create connection and joy. |
| **Scope – What's Covered** | - Weekly/monthly Sunday dinners.<br>- Family activities (cooking, crafts, outings).<br>- Seasonal/holiday rituals. |

| | |
|---|---|
| **Authority – XP Can Do Without Asking** | - Choose recipes/activities from trusted sources (NYT Cooking, FT recipes, Ottolenghi, etc.).<br>- Order groceries/supplies in advance.<br>- Propose 2–3 activity ideas (indoor, outdoor, creative). |
| **Exceptions – Must Confirm** | - Activities requiring >$200 spend.<br>- Any unusual/out-of-scope events (overnight trips, travel). |
| **Information & Tools Provided** | - Family preferences (cuisine, activities, allergies).<br>- Approved budget + vendors. |
| **Approval Thresholds** | - Up to $200 → proceed.<br>- $200–$500 → notify.<br>- >$500 → explicit approval. |
| **Preferred Communication & Frequency** | - Monthly proposal of tradition ideas via Slack. |
| **SOP – Step by Step** | 1. **T-2 Weeks** → XP proposes 2–3 options (cooking, craft, outing).<br>2. Client picks or XP defaults.<br>3. **T-1 Week** → Order groceries/supplies.<br>4. **Day-Of** → Send Slack reminder + itinerary.<br>5. **Post** → Log family feedback. |
| **Final Result** | Family builds meaningful rituals—cooking together, exploring, or creating—without client planning burden. |
| **Agreement** | Client: ______ XP: ______ Date: ______ |

Worked Example

**Monthly Family Tradition (March)**

- **Theme:** Sunday Dinner + Activity.
- **Plan:** XP proposed 3 options:
    1. NYT Cooking recipe (sheet-pan paella).
    2. Pottery painting at local studio.
    3. Indoor rock climbing session.

    **Client Chose:** Pottery painting.
- **Execution:** XP booked 2-hour pottery class ($160), ordered light dinner (pasta + salad kit, $60).
- **Reminder:** Slack AM message: "🎨 Pottery 2–4pm today, dinner kit in fridge for 6pm."
- **Result:** Family loved activity → XP logged feedback: "Hands-on activities = big hit."

# Delegation Curriculum

**Delegation Foundations**

- How to delegate
    - Delete Annoyance (simple relief)
        - Never wait on hold again
        - Never shop online again
        - Never RSVP again
        - Never read/pay for subscriptions you don't want
    - Own Your Day (intentional design)
        - Inbox predrafts
        - Calendar reset
        - Exercise lock
        - Goal guard
    - Run Life Like a Hotel (systemized living)
        - Stock refill
        - Remote home manager
        - Personal concierge desk
    - Multiply Your Impact (scale without strain)
        - Build influence
            - Salon diners
            - Great gifts
            - Relationship tracker
            - Capital commitments
        - Hiring Engine
            - Talent magnet
        - Get smarter
            - Book-to-action
            - Custom podcasts
            - News brief
            - Peer circles
        - Be a better boss
            - First day recognition
            - Team recognition
    - Live the Next Version of You (Black Diamond Delegation)
        - Energy, Health, Wellness
            - Nutrition concierge
            - Energy calendar
            - Bedtime ritual
            - Sleep score scheduling
            - Jet lag reset

                - Remote alarm
                - Decision filter
            - Family and Home
                - Homework buddy
                - Family historian
                - Personal CRM
                - Quick touchpoints
                - Relationship builder
                - Date nights
                - Weekend wonders
                - Milestone memories
                - Family traditions

- Methods of delegation
    - Thumbs (Emergency Only)
    - Fingers (Standard)
    - Voice (Speed Champion)
    - Proactive Delegation (Ultimate Leverage)

- Protocols and SOPs
    - Travel Management
    - Inbox Management
    - Calendar Management
    - Payments & Purchases
    - Expense Reports
    - Event Management
    - Health & Wellness
    - Home & Personal Admin
    - Project Management
    - Document & File Management
    - Communication & Social Media
    - Research & Briefing

- Cardinal Sins of Delegation

**Delegation Mastery**

- How to build trust
    - Method: The Horse Race
    - Method: Weekly Activities Report (WAR)

- How to delegate clearly
    - Method: Four Pillars

- How to build a delegation system
    - Method: Commitment Moments
    - Method: Feedback Loops
    - Method: Work Environment Audit
    - Template: Weekly Exec-XP System Alignment

- How to balance autonomy and control
    - Method: Trust and Teach
    - Method: Command and Control

- How to measure and improve delegation
    - Method: 3 Tests
    - Template: Decision Guide

- How to create a safe space to learn
    - Framework: Low threat, high challenge
    - Method: Focus on the future

# Judgement and Execution Library

# 📘 Athena Delegation Playbook

**Protocols & SOPs for Seamless Executive Partnership**

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## Cover Page

**Prepared for: ______________________________**
**Member Name**

**Prepared by: ______________________________**
**Executive Partner (XP)**

**Date: ______________________________**

**Version:** 1.0

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## Quick-Start Guide

### 🎯 Purpose of This Playbook

This Delegation Playbook defines the rules, boundaries, and workflows that make executive delegation effortless. Each protocol sets what success looks like, what's off-limits, and how your XP executes independently — so you stay focused on high-impact leadership.

### 🛠️ How to Use

1. **Choose a Domain** → Travel, Inbox, Calendar, Payments, Projects, etc.
2. **Fill the Template Together** → Client provides preferences + rules; XP captures details.
3. **Sign Off** → Both confirm agreement at the bottom.
4. **Store in Shared Folder** → All protocols live in one Playbook file.
5. **Review Quarterly** → Update thresholds, tools, or preferences as needs evolve.

### ✅ Why It Works

- **Clarity** → No ambiguity about authority, exceptions, or tools.
- **Consistency** → Every task follows the same SOP structure.

- **Control** → Approval thresholds + reporting rules keep you in charge without micromanaging.
- **Confidence** → Client and XP work from the same playbook, aligned and accountable.

## 📊 Protocol Index – At a Glance

| Domain | Icon | Scope | XP Authority | Exceptions | Updates |
|---|---|---|---|---|---|
| Travel | ✈️ | Flights, hotels, transport | Book prefs, rebook < $500 | Intl trips, > $2,500 | Slack + calendar notes |
| Inbox | 📧 | Triage, drafting | Archive, draft replies | Board/legal/finance | Daily digest + Slack ping |
| Calendar | 📅 | Scheduling, blocking | Decline low-priority | Board/travel | Daily snapshot + weekly lookahead |
| Payments | 💳 | Purchases, bills | Orders < $250, recurring bills | > $250, new vendors | Real-time + weekly summary |
| Expenses | 🧾 | Reports, reconciliation | Submit < $5,000 | > $5,000 unusual | Weekly + monthly summary |
| Events | 🍽️ | Dinners, offsites | Book venues < $5,000 | Speakers/guests | Slack + weekly check-in |
| Health | 🏥 | Appointments, checkups | Book recurring providers | New specialists, > $500 | Monthly summary |
| Home | 🏡 | Utilities, vendors | Pay bills, vendors < $500 | New vendors, > $500 | Real-time updates |
| Projects | 📂 | Task tracking | Manage tracker | Scope changes | Weekly digest |
| Docs | 📑 | Filing, versioning | Organize, naming rules | Legal/board docs | Monthly summary |
| Social | 📣 | Posts, monitoring | Draft/schedule posts | Sensitive/controversial | Weekly plan |
| Research | 🔍 | Briefings, scans | Compile + summarize | Due diligence | Per request |

## Delegation Protocol & SOP Template (Fillable)

| Section | Details to Complete |
|---|---|
| **Protocol Title** | ______________________________ |
| **Purpose** | Rules + boundaries for delegating: ______________________________ |
| **Scope – What's Covered** | - ______________________________<br>- ______________________________ |
| **Authority – What XP Can Do Without Asking** | - ______________________________<br>- ______________________________ |
| **Exceptions – When XP Must Confirm** | - ______________________________<br>- ______________________________ |
| **Information & Tools Provided** | - ______________________________<br>- ______________________________ |
| **Approval Thresholds** | - Up to $_________ → proceed<br>- $**–$** → notify<br>- Above $_________ → explicit approval |
| **Updates** | Channel: ______________________________<br>Frequency: ______________________________ |
| **SOP – Step by Step** | 1. Receive Request → ______________________________<br>2. Gather Details → ______________________________<br>3. Execute → ______________________________<br>4. Confirm & Update → ______________________________<br>5. Review & Close → ______________________________ |
| **Final Result** | XP delivers: ______________________________ |
| **Agreement** | Client Signature: _______ XP Signature: _______ Date: _______ |

---

## Domain Protocols

Each protocol gets its own 1-page fillable template using the structure above.

1. Travel Management
2. Inbox Management
3. Calendar Management
4. Payments & Purchases
5. Expense Reports
6. Event Management
7. Health & Wellness
8. Home & Personal Admin
9. Project Management
10. Document & File Management
11. Communication & Social Media
12. Research & Briefing

---

# Worked Examples

# 1. Travel Management

| Section | Details to Complete |
|---|---|
| **Protocol Title** | Travel Management |
| **Purpose** | Defines rules and boundaries for delegating all travel booking. |
| **Scope – What's Covered** | - Flights<br>- Hotels<br>- Ground transport<br>- Visa documentation |
| **Authority – What XP Can Do Without Asking** | - Book within approved preferences<br>- Apply loyalty numbers<br>- Rebook flights under $500 |
| **Exceptions – When XP Must Confirm** | - International trips<br>- Costs >$2,500<br>- New vendors |
| **Information & Tools Provided** | - Loyalty logins in 1Password<br>- Corporate card<br>- Travel profile |

| | |
|---|---|
| **Approval Thresholds** | Up to $2,500 → proceed<br>$2,500–$5,000 → notify<br>Above $5,000 → explicit approval |
| **Updates** | Slack + calendar notes<br>Real-time for bookings, weekly digest |
| **SOP – Steps** | Receive request → Confirm details → Book → Share itinerary/receipt → Add to calendar |
| **Final Result** | Complete itineraries with receipts + loyalty points applied. |

## 2. Inbox Management

| Section | Details to Complete |
|---|---|
| **Protocol Title** | Inbox Management |
| **Purpose** | Reduce inbox clutter; delegate triage and drafting. |
| **Scope – What's Covered** | - Filtering<br>- Flagging urgent items<br>- Drafting responses |
| **Authority** | - Archive/delete low-value emails<br>- Draft standard responses |
| **Exceptions** | - Board/legal/financial correspondence |
| **Information & Tools** | - Gmail delegated access<br>- Style guide |
| **Updates** | Daily digest email; Slack ping for urgent |
| **SOP – Steps** | Review → Tag/triage → Draft → Notify client → Track follow-ups |
| **Final Result** | Inbox zero; only high-value items reach client. |

## 3. Calendar Management

| Section | Details to Complete |
|---|---|

| | |
|---|---|
| **Protocol Title** | Calendar Management |
| **Purpose** | Protect client’s time and priorities. |
| **Scope** | - Scheduling<br>- Time blocking<br>- Meeting prep |
| **Authority** | - Decline low-priority meetings<br>- Accept per rules<br>- Adjust blocks |
| **Exceptions** | - Board-level<br>- Travel-related |
| **Tools** | Google Calendar; preference doc |
| **Updates** | Slack daily snapshot; weekly email lookahead |
| **SOP – Steps** | Review requests → Apply rules → Confirm/decline → Add prep notes → Share updates |
| **Final Result** | Aligned calendar with focus preserved. |

## 4. Payments & Purchases

| Section | Example |
|---|---|
| **Protocol Title** | Payments & Purchases |
| **Scope** | Online shopping, bills, subscriptions |
| **Authority** | Use 1Password, orders < $250, recurring bills |
| **Exceptions** | Purchases > $250, new vendors, unapproved addresses |
| **Approval Thresholds** | Up to $250 → proceed<br>$250–$1,000 → notify<br>Above $1,000 → explicit approval |
| **Updates** | Slack; real-time if >$250, weekly summary otherwise |

| | |
|---|---|
| **SOP – Steps** | 1. Client sends link<br>2. XP confirms details<br>3. Execute purchase<br>4. Slack update + save receipt<br>5. Verify delivery |
| **Final Result** | Client never enters card details; XP completes purchase securely with receipts stored. |
| **Agreement** | Client Signature: Alex Smith<br>XP Signature: Jordan Lee<br>Date: Sept 3, 2025 |

## 5. Expense Reports

| Section | Example |
|---|---|
| **Protocol Title** | Expense Reports |
| **Scope** | - Credit card reconciliation<br>- Monthly expense filing |
| **Authority** | Submit reports under $5,000 |
| **Exceptions** | Unusual vendors or >$5,000 |
| **Tools** | Expensify, Amex, receipts folder |
| **Updates** | Weekly Slack + monthly summary |
| **SOP – Steps** | Collect receipts → Categorize → Submit → Save PDF copy |
| **Final Result** | Reports filed on time, zero client effort. |

## 6. Event Management

| Section | Example |
|---|---|
| **Protocol Title** | Event Management |

| | |
|---|---|
| **Scope** | - Dinner parties<br>- Client roundtables<br>- Offsites |
| **Authority** | Book venues up to $5,000<br>Send invites |
| **Exceptions** | Speaker/guest approvals |
| **Tools** | Google Calendar, Notion, event budget |
| **Updates** | Slack + weekly call |
| **SOP – Steps** | Draft plan → Secure venue → Send invites → Track RSVPs → Coordinate day-of |
| **Final Result** | Seamless event execution with budget tracked. |

# 7. Health & Wellness

| Section | Example |
|---|---|
| **Protocol Title** | Health & Wellness |
| **Scope** | - Doctor appointments<br>- Fitness memberships<br>- Annual checkups |
| **Authority** | Book recurring appointments |
| **Exceptions** | New specialists or costs >$500 |
| **Tools** | Insurance portal, preferred providers |
| **Updates** | Slack summary monthly |
| **SOP – Steps** | Track schedule → Book → Confirm client → Add to calendar |
| **Final Result** | Health needs managed proactively, no scheduling gaps. |

## 8. Home & Personal Admin

| Section | Example |
| --- | --- |
| **Protocol Title** | Home & Personal Admin |
| **Scope** | - Utilities<br>- Household vendors<br>- Deliveries |
| **Authority** | Pay utilities<br>Schedule vendors under $500 |
| **Exceptions** | New vendors or >$500 |
| **Tools** | 1Password, shared sheet |
| **Updates** | Slack real-time |
| **SOP – Steps** | Receive request → Book vendor/pay bill → Confirm update |
| **Final Result** | Home runs smoothly, no admin burden. |

## 9. Project Management

| Section | Example |
| --- | --- |
| **Protocol Title** | Project Management |
| **Scope** | - Task tracking<br>- Deadlines<br>- Team coordination |
| **Authority** | Update tracker; follow up with collaborators |
| **Exceptions** | Strategic scope changes |
| **Tools** | Asana/Notion |
| **Updates** | Weekly digest |
| **SOP – Steps** | Log tasks → Clarify → Track → Report status |

| | |
|---|---|
| **Final Result** | Projects move forward without client chasing details. |

## 10. Document & File Management

| Section | Example |
|---|---|
| **Protocol Title** | Document & File Management |
| **Scope** | - Filing<br>- Naming conventions<br>- Version control |
| **Authority** | Organize shared folders |
| **Exceptions** | Legal/board docs |
| **Tools** | Google Drive, Dropbox |
| **Updates** | Monthly snapshot |
| **SOP – Steps** | File docs → Apply naming rules → Confirm access |
| **Final Result** | Documents accessible and organized. |

## 11. Communication & Social Media

| Section | Example |
|---|---|
| **Protocol Title** | Communication & Social Media |
| **Scope** | - Draft LinkedIn posts<br>- Schedule tweets<br>- Monitor mentions |
| **Authority** | Draft and schedule posts |
| **Exceptions** | Personal/controversial content |
| **Tools** | Buffer, LinkedIn |
| **Updates** | Weekly content plan |

| | |
|---|---|
| **SOP – Steps** | Draft → Share for approval → Schedule → Monitor |
| **Final Result** | Consistent, on-brand online presence. |

# 12. Research & Briefing

| Section | Example |
|---|---|
| **Protocol Title** | Research & Briefing |
| **Scope** | - Market scans<br>- Competitor summaries<br>- Meeting briefs |
| **Authority** | Compile research reports |
| **Exceptions** | Sensitive due diligence |
| **Tools** | Notion, Google Docs |
| **Updates** | Per brief request |
| **SOP – Steps** | Gather → Synthesize → Summarize → Deliver brief |
| **Final Result** | Clear, actionable briefs delivered on time. |

—
Alt content:

# ⚙️ EXECUTION LIBRARY (SOP Templates)

*"How we do things every time."*
Used for routine, repeatable processes that require precision and consistency.

### 🧩 Execution Library Template (Fill-in-the-Blank)

**SOP Title:** [Name of the process, e.g., "Weekly Calendar Prep"]
**Owner:** [Name or role, e.g., "XP / Executive Partner"]
**Purpose:** [Why this matters — e.g., "Ensure the executive's week starts with total clarity and alignment."]
**Frequency:** [Daily / Weekly / Monthly / As Needed]

**Steps:**

1. [Action 1]
2. [Action 2]
3. [Action 3]
4. [Action 4]
5. [Quality check or follow-up step]

**Tools / Platforms:** [Email, Asana, GCal, Slack, etc.]
**Expected Output:** [What success looks like]
**Quality Standard:** [How the result is evaluated — e.g., "No scheduling conflicts; inbox under 20 unread messages."]

### 📬 Example 1: Inbox Management (SOP)

**SOP Title:** Daily Inbox Triage
**Owner:** XP
**Purpose:** Maintain a clean, high-signal inbox so the executive only sees what requires strategic input.
**Frequency:** Daily (AM + PM pass)

**Steps:**

1. Sort all incoming emails into three folders: *Action Needed, Reading, Filed.*
2. Flag urgent items with a 🔴 and note in Daily Summary.
3. Draft pre-approved responses for recurring senders (per template).
4. Archive or label all other messages.
5. Confirm with executive once triage complete.

**Tools:** Gmail, Superhuman, or Outlook
**Expected Output:** Inbox zero by 6PM daily.
**Quality Standard:** <10 unreviewed messages in primary inbox; all flagged emails actioned within 24h.

### 📅 Example 2: Calendar Management (SOP)

**SOP Title:** Weekly Calendar Optimization
**Owner:** XP
**Purpose:** Ensure the executive's week aligns with priorities, energy, and focus rhythms.
**Frequency:** Every Friday

**Steps:**

1. Review upcoming week's calendar and color-code by category (Internal / External / Deep Work / Personal).
2. Remove or reschedule low-priority meetings based on last week's reflection.
3. Block travel, buffer, and recovery time as needed.
4. Send the "Weekly Preview" email by Friday 4PM summarizing key commitments and goals.

**Tools:** Google Calendar, Notion, Asana
**Expected Output:** Balanced, high-intent week with minimal context switching.
**Quality Standard:** <2 conflicts; ≥3 Deep Work blocks/week.

### ✈️ Example 3: Travel Management (SOP)

**SOP Title:** Executive Trip Planning
**Owner:** XP
**Purpose:** Ensure every trip is efficient, stress-free, and aligned with executive preferences.
**Frequency:** As needed per trip

**Steps:**

1. Confirm trip purpose, destination, and key dates.
2. Research flights that align with preferred airlines, times, and class.
3. Book hotel near event venue or client site per lodging preferences.
4. Create Travel Brief (flights, hotel, meetings, contacts, weather, time zones).

5. Share 24 hours before departure in shared drive + SMS summary.

**Tools:** TravelPerk, Amex Portal, Notion
**Expected Output:** Confirmed itinerary with zero last-minute surprises.
**Quality Standard:** All confirmations in one PDF; no scheduling conflicts.

# 🧭 JUDGMENT LIBRARY (Protocol Templates)

*"What to do when something changes or goes wrong."*
Used for decision-making in ambiguous, time-sensitive, or high-judgment scenarios.

### 🧩 Judgment Library Template (Fill-in-the-Blank)

**Protocol Title:** [e.g., "Client Email Escalation"]
**Trigger:** [When does this activate? e.g., "When an urgent client email arrives after hours."]
**Goal:** [What outcome are we optimizing for? e.g., "Resolve issue within 2 hours without waking the exec."]
**Primary Actions:**

- If [Condition A], then [Action].
- If [Condition B], then [Action].
- If [Condition C], escalate to [Person].
  **Escalation Threshold:** [When to loop in the executive.]
  **Communication Standard:** [Tone, channel, timing.]
  **Success Metric:** [What "good" looks like.]

### 📬 Example 1: Inbox Management (Protocol)

**Protocol Title:** Urgent Email Response Protocol
**Trigger:** Any message marked URGENT or sent from [list of VIPs].
**Goal:** Ensure critical emails receive immediate, accurate acknowledgment.

**Primary Actions:**

- If request is time-sensitive (<4 hours): Draft response, send acknowledgment, propose next step.
- If unclear: Reply with placeholder ("Received, reviewing, will revert by [time]").
- If issue affects external party: Escalate to exec immediately via text.

**Escalation Threshold:** $ or Reputation risk; anything involving legal, press, or client escalation.
**Communication Standard:** Crisp, professional, no overpromising.
**Success Metric:** Response time under 15 minutes during business hours.

### 📅 Example 2: Calendar Management (Protocol)

**Protocol Title:** Schedule Change Protocol
**Trigger:** Cancellation or conflict involving the executive's time.
**Goal:** Protect focus time and minimize disruption.

**Primary Actions:**

- If internal meeting canceled: Convert to Deep Work block.
- If client meeting canceled: Offer 2 alternate times within 24h.

- If double-booked: Prioritize based on impact (Client > Board > Internal).
  **Escalation Threshold:** Only escalate if both meetings are strategic and can't move.
  **Communication Standard:** Always reply within 15 minutes of cancellation.
  **Success Metric:** No net loss of focus or relationship capital.

### ✈️ Example 3: Travel Management (Protocol)

**Protocol Title:** Travel Disruption Protocol
**Trigger:** Flight canceled, delayed, or rescheduled.
**Goal:** Ensure the executive remains calm, connected, and rebooked within 90 minutes.

**Primary Actions:**

- If delay <2h: Rebook same carrier, notify exec via text.
- If overnight disruption: Book nearest 4-star hotel; reschedule next day's meetings.
- If cost >$2,000 or international change: Text exec for approval.
  **Escalation Threshold:** Missed key meeting or international flight disruption.
  **Communication Standard:** Clear, time-stamped text update with new plan.
  **Success Metric:** New itinerary confirmed before exec reaches the gate.

# 🧠 Pro Tip: The Pairing Model

Every SOP should have a Protocol "shadow":

| SOP | Matching Protocol |
|---|---|
| Inbox Triage | Urgent Email Escalation |
| Calendar Optimization | Schedule Change |
| Trip Planning | Travel Disruption |
| Expense Submission | Fraud or Overbudget Handling |
| Client Prep | Crisis or Complaint Handling |

This pairing ensures you've delegated both **consistency** *and* **judgment** — the hallmark of executive-level delegation.

# 🧭 ATHENA DELEGATION SYSTEM

***Execution + Judgment Libraries Template Pack for Executives & Founders***

## 📘 EXECUTION LIBRARY (SOPs)

*"How we do things every time."*
Use for repeatable tasks where consistency, accuracy, and speed matter.

### 🔧 SOP TEMPLATE

**SOP Title:**
[Insert process name]

**Owner:**
[Name or Role]

**Purpose:**
[Why this SOP exists and what outcome it ensures]

**Frequency:**
[Daily / Weekly / Monthly / As Needed]

**Steps:**
1.
2.
3.
4.
5.

**Tools / Platforms:**
[List tools or systems used]

**Expected Output:**
[Describe the final deliverable or result]

**Quality Standard:**
[Describe the standard of “done” or acceptance criteria]

## 💼 PRE-FILLED EXAMPLES

### 📬 Inbox Management — *Daily Inbox Triage*

**Owner:** XP
**Purpose:** Keep inbox under control and ensure only high-value items reach the executive.
**Frequency:** Daily (AM + PM)
**Steps:**

1. Sort inbox into Action Needed, Reading, Filed.
2. Flag urgent items and note in Daily Summary.
3. Draft pre-approved responses where possible.
4. Archive completed threads.
5. Confirm “Inbox Zero” by 6 PM.
   **Tools:** Gmail, Superhuman, Slack
   **Expected Output:** < 10 unread messages.
   **Quality Standard:** All flagged emails actioned within 24 hours.

### 📅 Calendar Management — *Weekly Calendar Optimization*

**Owner:** XP
**Purpose:** Align calendar with strategic priorities and personal energy.
**Frequency:** Weekly (Fridays)
**Steps:**

1. Color-code meetings by category.
2. Reschedule or remove low-value meetings.
3. Block Deep Work and Recovery windows.

4. Send “Weekly Preview” by Friday 4 PM.
   **Tools:** Google Calendar, Notion
   **Expected Output:** Balanced week with ≥ 3 Deep Work blocks.
   **Quality Standard:** No conflicts; proactive adjustments logged.

### ✈️ Travel Management — *Executive Trip Planning*

**Owner:** XP
**Purpose:** Deliver seamless, stress-free travel.
**Frequency:** Per trip
**Steps:**

1. Confirm trip purpose, destination, and dates.
2. Book flights per preferences.
3. Reserve hotel near meetings.
4. Create Travel Brief (PDF + SMS).
5. Deliver 24 hours pre-departure.
   **Tools:** TravelPerk, Amex Portal, Notion
   **Expected Output:** Single confirmed itinerary file.
   **Quality Standard:** Zero last-minute issues.

# 🧭 JUDGMENT LIBRARY (Protocols)

*"What to do when something changes or goes wrong."*
Use for decisions, exceptions, or ambiguity.

## 🔧 PROTOCOL TEMPLATE

**Protocol Title:**
[Insert protocol name]

**Trigger:**
[Describe what activates this protocol]

**Goal:**
[Define the intended outcome]

**Primary Actions:**

- If [Condition A], then [Action].
- If [Condition B], then [Action].
- If [Condition C], then [Action].

**Escalation Threshold:**
[When to involve the executive]

**Communication Standard:**
[Tone, speed, and channel expectations]

**Success Metric:**
[How success will be measured]

## 💼 PRE-FILLED EXAMPLES

### 📬 Inbox Management — *Urgent Email Response Protocol*

**Trigger:** Email from VIP or marked "Urgent."
**Goal:** Ensure timely, accurate responses without delay.
**Primary Actions:**

- < 4 h deadline: Reply or acknowledge immediately.
- Unclear: Send "Received + will revert by [time]."
- Sensitive sender: Text exec for visibility.
  **Escalation Threshold:** Legal, press, or client risk.
  **Communication Standard:** 15-minute SLA during business hours.
  **Success Metric:** No urgent email unacknowledged.

### 📅 Calendar Management — *Schedule Change Protocol*

**Trigger:** Cancellation or conflict.
**Goal:** Protect focus and client relationships.
**Primary Actions:**

- Internal cancel → convert to Deep Work.
- Client cancel → offer 2 new slots < 24 h.
- Double-book → prioritize by impact (Client > Board > Internal).
  **Escalation Threshold:** Two critical meetings overlap.
  **Communication Standard:** 15-minute reply window.
  **Success Metric:** No lost focus blocks.

### ✈️ Travel Management — *Travel Disruption Protocol*

**Trigger:** Flight canceled/delayed.
**Goal:** Rebook within 90 minutes; minimize stress.
**Primary Actions:**

- Delay < 2 h → same carrier.
- Overnight → book nearest 4-star hotel, reschedule meetings.
- International > $2 K → text exec for approval.
  **Escalation Threshold:** Missed major meeting or international leg.
  **Communication Standard:** Clear text update with timestamp + new plan.
  **Success Metric:** New itinerary confirmed before gate closure.

# 🔗 PAIRING MATRIX

| SOP | Matching Protocol |
|---|---|
| Inbox Triage | Urgent Email Response |
| Calendar Optimization | Schedule Change |
| Trip Planning | Travel Disruption |

| | |
|---|---|
| Expense Submission | Overbudget Exception |
| Client Prep | Crisis Handling |

## How to Delegate