

CEO of AI Staff

Companion Toolkit · Version 1.0

Canonical source: Book 1 Publication Master V4 - Edited Canon

For owner-operators and accountable business or department leaders. Core companion value; free community access; no book purchase required.

Use real business evidence, keep confidential information inside approved company systems, and retain human accountability for consequential decisions.

How to use this toolkit

Move chapter by chapter or begin with the worksheet that matches the decision in front of you. Each worksheet is private by default. Share only anonymized lessons in CEO Leverage unless your company has explicitly approved broader disclosure.

Chapter crosswalk

- Chapter 1: Recurring Intervention Capture Sheet — Capture five recurring interventions without solving them.
- Chapter 2: Work Map — Map one recurring work loop from trigger to review.
- Chapter 3: First Seat Test — The weakest element controls the decision.
- Chapter 4: Seat Boundary Guardrail — Capability may be broad. Responsibility must be bounded.
- Chapter 5: Job and Operating Contract — A named human must be able to determine whether the result occurred and the limits were respected.
- Chapter 6: First AI Seat Blueprint — Record an explicit answer, a named owner who must provide it, or a reason to stop.
- Chapter 7: Approved Playbook and Seat Anatomy — Every action path must end in a reviewable output, an escalation, or a stop.
- Chapter 8: Probation Failure Review — Evidence is not interpretation. Containment is not correction. Another test is not production approval.
- Chapter 9: First-Seat Probation Plan — Trust is permission bounded by evidence and human accountability.
- Chapter 10: CEO Exception Record — Observe, classify, own, respond, and review one real exception before expanding the system.
- Chapter 11: One-Page Sponsor Decision — Begin with the baseline and economic job, not the tool.
- Chapter 12: CEO Review Loop and Decision Record — The CEO review does not reward novelty. It decides what the evidence has earned.

Chapter 1 — Recurring Intervention Capture Sheet

Capture five recurring interventions without solving them.

#	Trigger	Current responder	Intervention	Consequence
1				
2				
3				
4				
5				

Decision and next action

Decision	
Evidence supporting it	
Accountable human	
Next action	
Stop or review condition	

Chapter 2 — Work Map

Map one recurring work loop from trigger to review.

Trigger	
Cadence	
Handoffs	
Judgment point	
Exception	
Consequence of delay or error	
Existing review	
Human owner	

Decision and next action

Decision	
Evidence supporting it	
Accountable human	
Next action	
Stop or review condition	

Chapter 3 — First Seat Test

The weakest element controls the decision.

Economic Job	
Current Constraint	
Repeatability	
Measurability	
Governability	
Weakest element	
Decision: select, defer, or reject	

Decision and next action

Decision	
Evidence supporting it	
Accountable human	
Next action	
Stop or review condition	

Chapter 4 — Seat Boundary Guardrail

Capability may be broad. Responsibility must be bounded.

One ongoing job	
In-scope work	
Out-of-scope work	
Prohibited actions	
Escalation owner	
Boundary sentence: This seat does one ongoing job and does not do these adjacent jobs	

Decision and next action

Decision	
Evidence supporting it	
Accountable human	
Next action	
Stop or review condition	

Chapter 5 — Job and Operating Contract

A named human must be able to determine whether the result occurred and the limits were respected.

Result	
Information	
Authority	
Limits	
Evidence	
Human owner	
Trigger	
Handoffs	

Decision and next action

Decision	
Evidence supporting it	
Accountable human	
Next action	
Stop or review condition	

Chapter 6 — First AI Seat Blueprint

Record an explicit answer, a named owner who must provide it, or a reason to stop.

Job result	
Instructions	
Approved references	
Access	
Authority	
Prohibitions	
Triggers	
Handoffs	
Escalation	
Measures	
Human owner	
Verdict: approve for bounded probation, revise and re-interview, or reject	

Decision and next action

Decision	
Evidence supporting it	
Accountable human	
Next action	
Stop or review condition	

Chapter 7 — Approved Playbook and Seat Anatomy

Every action path must end in a reviewable output, an escalation, or a stop.

Seat charter	
Instruction source	
Approved information	
Capability and tools	
Trigger	
Action boundary	
Handoffs and escalation	
Evidence trail	
Human owner and change control	
Normal path	
Exception path 1	
Exception path 2	

Decision and next action

Decision	
Evidence supporting it	
Accountable human	
Next action	
Stop or review condition	

Chapter 8 — Probation Failure Review

Evidence is not interpretation. Containment is not correction. Another test is not production approval.

Expected result	
Observed result	
Evidence preserved	
Known facts	
Unknowns	
Actual or potential impact	
Containment	
Control-gap hypothesis	

Probation Failure Review — continued

Approved Playbook part and version	
Human owner	
Proposed correction or restriction	
Gate decision: stop, revise, restrict, or one more bounded test	
Next test boundary	
Next evidence requirement	
Reviewer	
Stop condition	

Decision and next action

Decision	
Evidence supporting it	
Accountable human	
Next action	
Stop or review condition	

Chapter 9 — First-Seat Probation Plan

Trust is permission bounded by evidence and human accountability.

Evidence supporting the authority decision	
Current authority boundary	
Decision: hold, narrow, or expand by one bounded responsibility	
Authority still withheld	
Stop condition	
Next review point	
Human owner	

Decision and next action

Decision	
Evidence supporting it	
Accountable human	
Next action	
Stop or review condition	

Chapter 10 — CEO Exception Record

Observe, classify, own, respond, and review one real exception before expanding the system.

Exception	
Evidence	
Severity	
Owner	
Response	
Recurrence	
Authority impact	
Timing: immediate, scheduled, or accepted	
Playbook/control change	
Next review	

Decision and next action

Decision	
Evidence supporting it	
Accountable human	
Next action	
Stop or review condition	

Chapter 11 — One-Page Sponsor Decision

Begin with the baseline and economic job, not the tool.

Baseline	
Economic job	
Sponsor	
Scope	
Human owner	
Access	
Controls	
Evidence	
Exceptions	

One-Page Sponsor Decision — continued

Risk owner	
Review logic	
Decision options	
Monday: what happens?	
Monday: who does what?	
Monday: what can go wrong?	
Monday: who decides?	
Monday: what will we know afterward?	

Decision and next action

Decision	
Evidence supporting it	
Accountable human	
Next action	
Stop or review condition	

Chapter 12 — CEO Review Loop and Decision Record

The CEO review does not reward novelty. It decides what the evidence has earned.

Baseline	
Evidence	
Exceptions	
Controls	
Ownership	
Decision: retain, retrain, restrict, or replace	
Next-cycle authority	
Stop condition	
Owner	

CEO Review Loop and Decision Record — continued

Next review date	
Human-do work changed	
Routine work moved	
Review work appeared	
Exceptions that remain human	
Rescues that disappeared	
New management load	
What still returns unexpectedly	
Next-seat candidate (do not hire yet)	

Decision and next action

Decision	
Evidence supporting it	
Accountable human	
Next action	
Stop or review condition	