

◆ OPEN-SOURCE AI PLAYBOOK · FOR LEADERS

Board & Investor Update

Every board pack means days of chasing numbers and commentary from every team.

THE SYSTEM

Drafts the update from your numbers, wins and asks, in your format and voice, for you to edit.

🕒 BUILD TIME

1-2 weeks

🔧 HOW IT'S BUILT

Low-code

🔌 WORKS WITH

Google Workspace or
Microsoft 365

👤 OWNER

The CFO or chief of
staff, for the CEO

How it works: from chasing every team to one draft letter

BEFORE You chase every team



Mon ask · Wed chase · Fri chase again · **Sun write it yourself**

AFTER One draft, ready Monday

● Sales

Pipeline from the CRM

● Finance

The month-end close

● Product

The release tracker

● Customer success

Renewals and churn

● People

Headcount from the HR system

● Marketing

Lead and spend reports

✨ **The system** pulls the numbers, asks each lead three questions, checks the numbers against each other, drafts

1 Highlights

The three wins worth the board's time

2 Key numbers

Revenue, burn, runway and hiring against plan, each with its source

3 Lowlights

What missed plan, and what you're doing about it

4 Asks

Where the board can help: intros, hires, advice

🛡️ **Nothing goes to the board automatically.** The CFO checks every number → the CEO edits the words → the CEO sends it.

The draft, with the CEO's edits

KEY NUMBERS

ARR	\$4.82M	plan \$4.70M	Xero • Sep close
New ARR this quarter	\$612k	plan \$560k	HubSpot + Xero
Gross margin	78%	plan 75%	Xero
Net burn per month	\$310k	plan \$340k	Xero

LOWLIGHTS

Two enterprise deals (\$180k ARR) slipped to Q4 ~~due to long procurement cycles.~~ because we started their security reviews too late. We now start them at the first demo.

CEO: Own the slip. The board will ask why. • **CFO:** Every number checked against the September close.

Sample update, fictional company and numbers. ~~Deleted~~ added by the CEO

Who signs off

The system • Draft ready on Monday

A private doc with the numbers, every team's notes and a first draft. Gaps are marked, never filled in.

CFO • Checks every number

Against the close and the source systems, before anything else moves.

CEO • Edits the words

Tone, lowlights and asks: the part only you can write.

CEO • Sends it

From your own email or board portal, when you're ready. The system never sends.

Can we build it? **FOR YOUR TECH LEAD**

Tools you'll use

Where the numbers live	QuickBooks or Xero, plus HubSpot or Salesforce	or Google Sheets, your HR system
Pulling numbers on a schedule	n8n (it has nodes for all four)	or Make, Zapier
Notes from team leads	A three-question form sent in Slack	or Teams, Google Forms, Microsoft Forms
Writing the draft	Claude (API or Projects)	or ChatGPT, Gemini
Where you edit it	Google Docs, in suggesting mode	or Word with Track Changes
Your format and voice	Past updates in the Company Brain	or Notion, a shared Drive folder

Three ways to build it

Start simple **1-2 days**

Export the numbers to a sheet, add last quarter's letter and the team notes to a Claude or ChatGPT project, and ask for a draft in the same format.

Production **1-2 weeks**

n8n pulls the numbers on a set day, collects three answers from each team lead, checks the numbers against each other and writes a draft Google Doc.

Custom **3-4 weeks**

Adds the board pack: charts from the same numbers, a version for each audience and a log of where every number came from.

Access it needs

- ◆ Read-only access to the accounting tool, the CRM and the metrics sheet
- ◆ Permission to create docs in one private folder
- ◆ A Slack or Teams app to message team leads, and no email sending

Guardrails

- ◆ It never sends; the CEO sends the update
- ◆ Every number shows its source, and a missing one stays a visible gap
- ◆ The CFO approves the numbers, the CEO approves the words
- ◆ Lowlights stay in; only a person decides how to word them

What to measure

- ◆ Hours from starting the update to sending it
- ◆ Reminders sent to team leads per update
- ◆ Numbers the CFO corrects at review
- ◆ Days from quarter close to the update going out

Who builds and runs it

A CFO or chief of staff who knows where every number lives, and someone comfortable with n8n for the first one to two weeks. After that the CFO owns the number checks and the CEO owns the words. Upkeep is a short check when a metric or the format changes.

◆ **FREE, OPEN SOURCE, NO SIGN-UP**

20 AI systems every company should *build first.*

This playbook is one of 20. Each one solves a problem almost every company has, and shows how the system works, the tools it runs on, how long it takes to build and where a person signs off. Read them all, download any of them, and send them to your team.

[See all 20 playbooks →](#)

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20 New-Hire Onboarding

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We'll build your first AI systems with your team.

In a free 30-minute call with our founder, we'll look at your tools and your week, and pick the playbooks that would save you the most time first.



Pallav Kaushish

Co-Founder, AiXGrowth

Free 30-minute call · No commitment

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