

◆ OPEN-SOURCE AI PLAYBOOK · FOR LEADERS

Weekly Business Review

Monday's numbers take someone half a day to pull, and nobody explains why they moved.

THE SYSTEM

Pulls every key number into one review, flags what changed and drafts the why before the meeting.

🕒 BUILD TIME

1-2 weeks

🔧 HOW IT'S BUILT

Low-code

🛠️ WORKS WITH

Google Workspace or
Microsoft 365 +
HubSpot or Salesforce

👤 OWNER

COO, chief of staff or
finance lead

How it works: every number in one scorecard, and a why for the ones that moved

Weekly business review · week 42 · sample scorecard, fictional company

— Better — Worse — Target

METRIC · OWNER	LAST WEEK	THIS WEEK	TARGET	8 WEEKS	CHANGE
New bookings Maya Chen, Sales	\$88k	\$92k	\$90k		▲ +5%
Pipeline created Maya Chen, Sales	\$395k	\$410k	\$400k		▲ +4%
Qualified leads Priya Raman, Marketing	198	151	190		▼ -24%
Why it moved (AI draft): The LinkedIn “Ops leaders” campaign paused on Tuesday when its monthly budget ran out. It brought 41 of last week’s 198 leads. Every other channel was within its usual range. LinkedIn Ads · campaign history · CRM · leads by source ✓ Confirmed by Priya					
Win rate Maya Chen, Sales	22%	31%	25%		▲ +9 pts
Why it moved (AI draft): Smaller deals closed faster after the new two-week pilot offer: 5 of this week’s 7 wins used it. Deals over \$50k won at the usual rate. CRM · closed deals ⚠️ Waiting for Maya: shown as a draft until then					
Churned revenue (monthly) Tom Becker, Customer success	\$1.0k	\$6.2k	under \$1.5k		▲ +\$5.2k
Why it moved (AI draft): Two customers left: Ostra Clinics (\$3.9k a month, moved to an in-house tool) and Pellbrook (\$2.3k, closed its US office). Both were flagged as at risk in September. Billing · cancellations · CRM · account notes ✍️ Edited and confirmed by Tom · added why Pellbrook left					
Cash collected Ines Moreau, Finance	\$121k	\$118k	\$110k		▼ -2%
Open support tickets Kofi Mensah, Support	58	61	under 60		▲ +5%

Sunday night → Monday 9 am

SUN 9:00 PM

Pull

Reads every number straight from the CRM, billing, ad accounts and help desk into the scorecard sheet.

SUN 9:10 PM

Compare

This week against last week, the 8-week trend and the target. Flags any number that moved more than twice its usual weekly swing.

SUN 9:15 PM

Draft the why

For each flagged number, looks at what changed nearby (a paused campaign, a lost customer, a new offer) and writes a short note with its source.

MON 7:00 AM

Owners check

Each owner gets their notes in Slack or Teams: confirm, edit or reject. Nothing is final until they do.

MON 9:00 AM

The meeting

The review opens on the flagged numbers. Confirmed notes are marked as confirmed; anything else shows as a draft.

Rules for every why: only causes it can point to · no clear cause found is an answer · numbers, not people · the owner has the last word.

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

Tools you'll use

Where the numbers live	HubSpot reports, billing, ad accounts, help desk	or Salesforce reports, a data warehouse
The scorecard	Google Sheets, with SPARKLINE for the trends	or Excel sparklines, Looker Studio
Pulling it every Sunday	n8n, on a schedule	or Make, Zapier, or a short script
Drafting the why	Claude	or ChatGPT, Gemini
Owner sign-off	Slack messages with confirm and edit buttons, sent from n8n	or Teams, or email

Three ways to build it

Start simple 1-2 days

Keep your current sheet. Paste in the week's numbers and run a saved Claude prompt that flags the big moves and lists what to ask each owner.

Production 1-2 weeks

n8n fills the sheet on Sunday night, flags the big moves, has Claude draft each why from campaign, deal and ticket history, and asks owners to confirm.

Custom 3-5 weeks

Moves the numbers into a warehouse, adds a dashboard, and keeps a log of past whys so each new note starts from what explained that number before.

Access it needs

- ◆ Read-only access to the CRM, billing, ad accounts and help desk
- ◆ Edit access to the one scorecard sheet
- ◆ A Slack or Teams app that can message each owner

Guardrails

- ◆ Numbers come straight from the source; the AI never types or changes one
- ◆ Every why names its source, or says no clear cause was found
- ◆ Each owner confirms or edits their notes before the meeting
- ◆ Unconfirmed notes are clearly marked as drafts
- ◆ It explains numbers, never blames people

What to measure

- ◆ Hours spent preparing the review, before and after
- ◆ Flagged numbers with a confirmed why by 9 am
- ◆ Notes owners had to rewrite
- ◆ Meeting time on decisions vs. on status

Who builds and runs it

An ops or finance lead who owns the scorecard, plus someone comfortable with n8n and your tools' reports for one to two weeks. After that, each number's owner spends a few minutes on Monday morning confirming their notes.

◆ **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 →](#)

START HERE

01 Company Brain

FOR EVERY TEAM

02 Meeting-to-Action
03 Instant Customer Answers

FOR MARKETING

04 Static Ad Creative System
05 Content Engine
06 Competitor Watch
07 Campaign Performance Report

FOR SALES

08 Speed-to-Lead Responder
09 Account Research & Outreach
10 CRM Autopilot
11 Proposal Builder
12 Pipeline Review Prep

FOR LEADERS

13 Automated Morning Brief
14 Weekly Business Review
15 Board & Investor Update

FOR OPS, FINANCE AND HR

16 Sales-to-Delivery Handoff
17 Invoice & Collections Chaser
18 Candidate Shortlist System
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Pallav Kaushish

Co-Founder, AiXGrowth

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