

QUICK START GUIDE

AI CEO OS

You're the CEO. AI is the company.

Set up your AI leadership team in about 30 minutes.

Version 3 · living dashboard · Early & Scaled tiers

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Welcome

You just got an AI leadership team for a one-person business. Instead of hiring marketing, sales, operations, finance, and more, you run them as AI roles — and you stay the CEO. This guide gets you to a working setup in about 30 minutes.

The big idea

Set up your business once. Use it forever. You answer a few questions one time; after that, every role already knows your offer, your audience, and your voice — so you never repeat yourself.

The one rule: work inside a project

Before anything else, this is the habit that makes everything work.

Create a project and live in it

Make a dedicated project folder for your business — like a folder called “AI CEO”. Do all your AI CEO work inside that project. That folder is your company’s headquarters: it holds your Business Profile and everything the roles create.

Don’t start a fresh, empty chat with no project attached and expect the roles to remember you — they read your business from the project folder. No project, no memory.

Why it matters: your “business memory” is a file that lives in the project, not in the AI. Keep working in the same project and every role — today, tomorrow, and after any upgrade — picks up exactly where you left off.

Do this once: create your project (e.g., “AI CEO”), and open it whenever you work on your business. One project per business.

Your living dashboard

AI CEO is not just prompts - it keeps a running picture of your business. Setup creates two things in your project: your Business Profile (who you are) and your Dashboard (your current state - this quarter’s focus, key numbers, and next actions).

It keeps itself up to date

As you work, the roles update your Dashboard and a few simple trackers - a Sales Pipeline, a Content Calendar, and a Decisions Log. Say “AI CEO: status” any time to see where you stand. It all lives in your project, so it is still there tomorrow - and it carries over untouched after any upgrade.

What you have

AI CEO OS comes in two tiers. You installed one of them — both work the same way; Scaled simply has more roles.

Tier	Roles you get
Early CEO	Router + Onboarding, plus Strategy, Marketing, Sales, Operations.
Scaled CEO	Everything in Early, plus Finance & Risk, People & Culture, Admin & Research.

Not sure which you have? Just say “**AI CEO**” any time and it will show you what’s available.

Step 1 — Install the plugin

1. Open the .plugin file you received with Claude.
2. Claude shows a preview of the skills inside.
3. Press the button to add it. The roles are now available.

Upgrading later (Early → Scaled)

Installing Scaled cleanly replaces Early and just adds the new roles. Your Business Profile and everything in your project carry over untouched — no re-setup. Say “AI CEO” afterward and it will welcome you and switch you to Scaled automatically.

Step 2 — Set up your Business Profile

The most important step. About 10 minutes, and it powers every role.

Inside your project, say:

Set up AI CEO

It asks a few questions — your business, offer, who it’s for, your tone, channels, and main goal. Answer briefly; it drafts strong defaults where you’re unsure. When it’s done, it saves your Business Profile into your project, and every role reads it from there.

Tip

Paste a short sample of your own writing when asked about tone. It’s the fastest way to make every post and email sound like you.

Step 3 — Meet your team

Start with the front door — say “**AI CEO**” and it routes you to the right role and shows your status. Or call any role directly with its name.

Router (your front door)

AI CEO
AI CEO: status
AI CEO: which role should I use for this?

Strategy / CEO Partner

Vision, priorities, decisions.

Strategy: what should I focus on this quarter?
Strategy: turn this idea into a roadmap and OKRs
Strategy: help me decide between these two options

Marketing & Content Lead

Marketing: plan my content for the next 4 weeks
Marketing: draft 5 LinkedIn posts from this week's plan
Marketing: repurpose this into 3 posts and an email

Sales & Client Success

Sales: summarize these call notes and draft a follow-up
Sales: turn these leads into CRM rows
Sales: write a proposal for [client]

Operations & Systems

Ops: turn this process into an SOP and checklist
Ops: break my 90-day goal into projects and tasks
Ops: set up my weekly review

Finance & Risk (Scaled)

Finance: build me a simple budget
Finance: am I charging enough?
Finance: where are my financial risks?

People & Culture (Scaled)

People: I want a contractor — what should I hand off first?
People: write a job brief and interview scorecard
People: help me give this feedback

Admin & Research (Scaled)

Admin: research 3 competitors and compare them
Admin: organize these notes
Admin: draft a first version of this one-pager

Your first week

Day	Do this (inside your project)	Role
1	Create your project. Install. Run “Set up AI CEO”.	Onboarding
2	Set this quarter's focus and OKRs.	Strategy
3	Plan 4 weeks of content; draft week one.	Marketing
4	Turn your leads into a tracked pipeline.	Sales
5	Turn your messiest task into an SOP.	Operations
6	(Scaled) Build a simple budget and check your pricing.	Finance
7	Run your first weekly review; plan next week.	Operations

Get the best results

- **Always work in your project.** It's where your memory lives. Outside it, the roles can't see your business.
- **Start with “AI CEO” or a role prefix.** It's the reliable way to reach your team, even if you have other skills installed.
- **Be specific.** “Draft 5 posts about onboarding mistakes” beats “write some posts.”
- **Keep the profile current.** When your offer or audience changes, say “update my Business Profile.”
- **Edit, don't expect perfect.** Treat outputs as strong first drafts; your edits teach it your taste.

FAQ

Do I need to be technical? No. If you can write an email, you can run this.

Why do I have to work in a project? Your Business Profile and all your work live in the project folder. That's your memory. Working there is what lets every role remember your business across days and upgrades.

I upgraded to Scaled — do I lose anything? No. Scaled replaces Early and adds roles. Your profile and project are untouched. Say “AI CEO” and it switches you over.

A role doesn't know my business. Make sure you're inside your project and that you ran “Set up AI CEO” there.

Do I need accounts or API keys? No. It works with whatever tools you already use.

Can I run more than one business? Yes — use a separate project for each, and run setup in each.

What's next

On Early and want the full team? Scaled CEO adds Finance, People, and Admin/Research — and upgrading keeps everything you've built. If you'd rather have it all set up and tailored for you, the done-with-you option does exactly that.

Now go run your company.

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