

The background features a series of concentric circles in a light orange color. The outermost circle is solid, while the inner ones are dashed. Small orange dots are scattered at various points along these circles, creating a subtle geometric pattern.

The Operator-Engineer

How CEOs turn AI capability into time back, better workflow design, and safe operating leverage.

Sam Gaddis & Matthew Hall · Runpoint · WSC Webinar · May 2026

The Room

You do not have enough **hours**.

We are here to use AI for something concrete: giving the CEO enough time back to think about the larger strategic work.

1

Email keeps fragmenting the day

The assistant should find what needs a reply, draft the response, and leave the send decision with you.

2

Calendar hides the real work

The assistant should turn meetings into prep notes, follow-ups, and a short list of decisions that need CEO attention.

3

Follow-up leaks between systems

Most missed leverage is not a bad strategy. It is a task, promise, or waiting item that never made it into the operating rhythm.

4

Delegation needs cleaner packets

A good assistant turns loose thoughts into context, owner, deadline, constraints, and a clear definition of done.

Before the transformation work, build the tool that makes tomorrow less crowded.

The Spectrum

Start with personal leverage. Then widen the surface area.

There are two useful conversations: the assistant you can build today and the AI-native operating system that takes months.



We will spend the workshop on the left side. The demos show what the right side can become.

Proof

Same pattern. Different businesses.

Operator-engineers do not build generic AI toys. They turn specific operating pain into shipped workflows.

RUNPOINT OS

Sales pipeline

Proposal generation

Recruiting workflow

Forecasting and capacity

Used by the whole team

AUSTIN CUSTOM CNC

AR / AP visibility

P&L cleanup

CRM and project tracking

Contract analysis

Weekly operating cadence

THIS DECK

Call transcript to outline

Synced presenter notes

PDF and OG automation

Single HTML artifact

Built as the need appeared

Internal services · manufacturing · sales workflow · presentation tooling

The reusable pattern is not the app. It is the habit: find painful workflow, expose data, build a narrow tool, measure, repeat.

Proof

Autonomous Proposals

LIVE DEMO

One Slack message. CRM updated. Proposal drafted. Human reviews before it goes out.

- Slack
- Claude Code
- Granola
- Runpoint CRM (Airtable)
- Gmail

```
SAM #RUNPOINT-OPS  
@hermes look at my last call, update the CRM, and create a proposal draft in my email
```

1 Read the call transcript
Pulls the Granola transcript from the most recent call. Extracts scope, stakeholders, timelines, and open questions.

2 Update the CRM
New contacts added. Opportunity stage advanced. Notes attached to the right account. All in Airtable.

3 Draft the proposal
Matches scope to our past work, pulls pricing from the rate card, generates a full proposal in our template.

4 Email the draft to me
Lands as a reply-ready draft in Gmail. I tweak and send. An afternoon of work becomes 10 minutes of review.

1 Slack message · 4 autonomous steps · afternoon → 10 minutes of review

The shift

The build is no longer the bottleneck.

What most companies ask

Can AI write the code? Can it build the thing?
That question is already behind the frontier.

What now matters

Knowing **what to build**, whether it is safe to use,
where the data lives, and **which workflow should
ship first**.

AI did not make every company instantly faster. It made operational judgment the scarce resource.

The New Scarcity

The Bottleneck Moved

Quoted excerpt

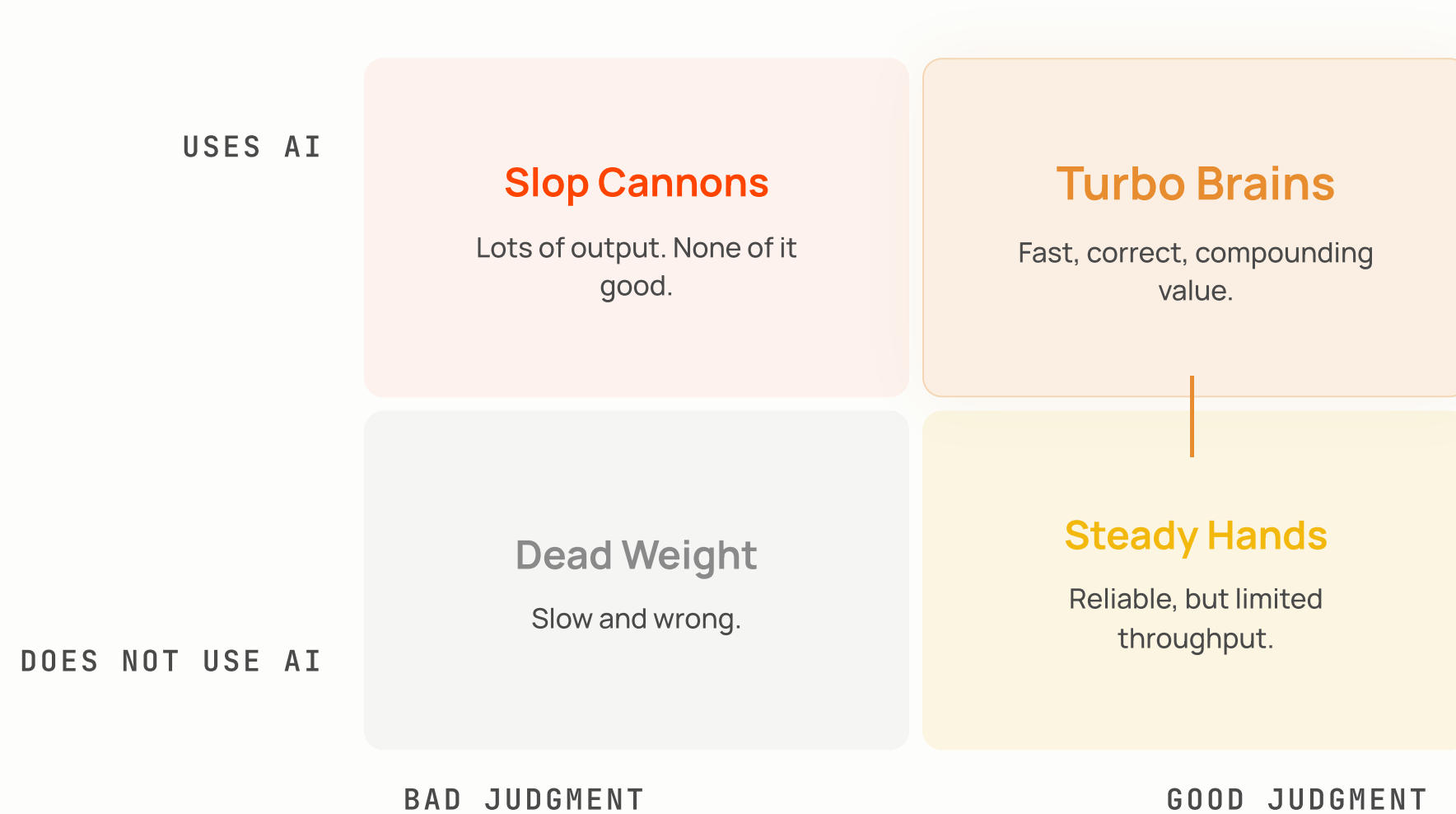
“God made men differ in strength, but Sam Colt made them equal. God made men differ in intelligence, but Sam Altman made them equal.”

When intelligence gets cheaper, taste and judgment matter more.

Adapted from tomie (@tomieinlove), X, May 20, 2026.

Concept 1

The AI Competence Matrix



Operating Modes

The Four Ways to Work with AI

Most CEO workflows should start in sparring or centaur mode. Agent mode comes later, after the judgment boundary is clear.

MODE 01

Artisanal

100% human / 0% AI

You do the work yourself because quality, context, or trust matters more than speed.

Cost: leverage left on the table.

MODE 02

Sparring

80% human / 20% AI

AI reflects, critiques, pressure-tests, and helps you see around corners.

Cost: easy to mistake feedback for work.

MODE 03

Centaur

40% human / 60% AI

You set taste and direction. AI produces the draft, artifact, or analysis.

Cost: review fatigue.

MODE 04

Agent

10% human / 90% AI

You frame the job, constrain the tools, and review the result after the work runs.

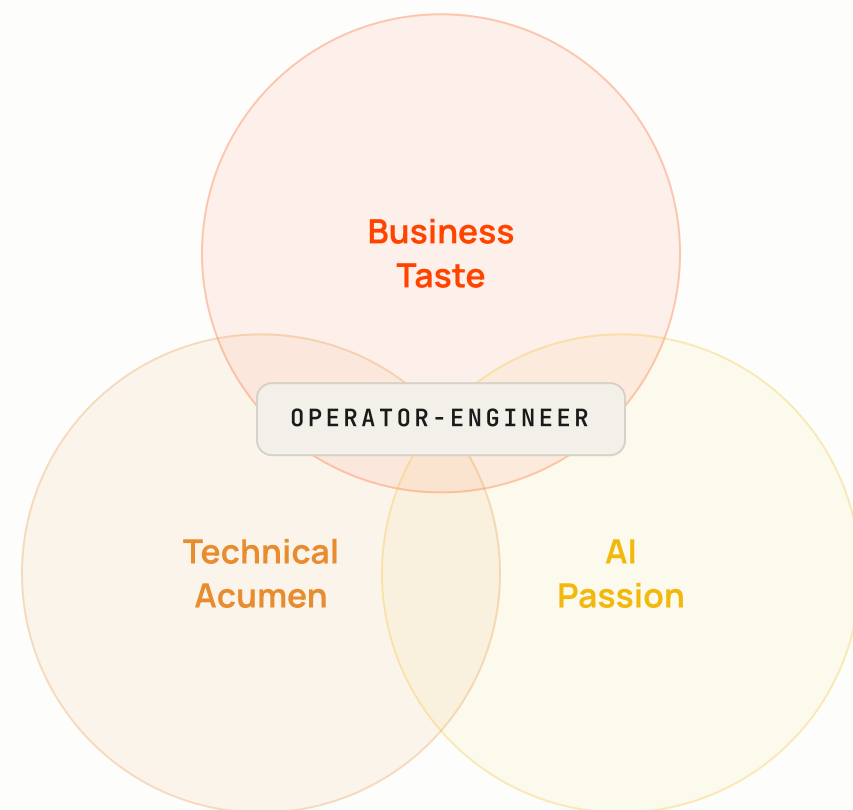
Cost: surrender in domains you care about.

Adapted from Jonny Miller (@jonnym1ller), "The Four Operating Modes," X, May 13, 2026.

The Role

The Operator-Engineer

The operator-engineer sits at the intersection of business taste, technical acumen, and AI intensity.



- | Knows which problem is worth solving
- | Comfortable at the code level, not just the prompt level
- | Ships fast, iterates faster, throws away freely
- | Treats AI as a power tool, not magic
- | Thinks in systems, not features

| Any two of three makes you useful. All three makes you dangerous.

safety

What makes this **safe to use**?

Do not ask AI to be trusted. Design the workflow so trust is earned in narrow, observable steps.

1

Human approval before external action

AI drafts, updates, recommends, and queues. A person approves emails, payments, contracts, customer messages, and irreversible changes.

2

Permissioned tools, not open-ended agents

Give the system scoped functions: read this CRM record, draft this proposal, flag this exception. Do not give it the keys to the business.

3

Audit trails and reversibility

Every action should be logged, attributed, diffable, and easy to undo. The safety layer is operational, not philosophical.

4

Start with low-blast-radius workflows

Begin with drafts, summaries, reconciliations, and internal queues. Move toward autonomy only after accuracy is measured in production.

Safe AI is not a model choice. It is a workflow design choice.

Workshop

Build a **CEO Assistant**

The first skill should help with the two places time leaks fastest: email and calendar.

D

Daily brief

Today's meetings, prep notes, open loops, and the emails that need a response before they become someone else's blocker.

R

Reply drafts

Drafts for the emails you should answer yourself, plus a delegation packet for messages someone else should own.

W

Weekly

What happened last week, what is coming next week, who is waiting on you, and where the company needs a CEO decision.

It drafts and summarizes. You approve sends, cancellations, commitments, and promises.

Copy-Paste

Your Mad-Lib Setup

Paste the prompt as Project Instructions. Add the priorities file to Project Knowledge. Fill the [BLANKS].

System Prompt

COPY

DOWNLOAD

```
# Role
You are [YOUR NAME]'s executive assistant.

# Goal
Save me time and keep things from slipping. Draft work, surface what matters, never act without approval.

# Where to find what you need
- priorities.md (Project Knowledge) – who I am, what matters this quarter, who matters most, what to flag, what to ignore, how I talk.
- Today's calendar and inbox via the connector.
- Uploaded transcripts in Project Knowledge, if present.

Read priorities.md before every response.

# Skills and routines
- Daily Digest – weekdays 7am. Brief + Gmail drafts.
- Friday Recap – Fridays 3pm. Week recap + next-week plan.
- Ad-hoc: triage, draft a reply, prep a meeting, summarize a thread.
Use priorities.md to decide what matters.

# Rules
```

priorities.md PROJECT KNOWLEDGE

COPY

DOWNLOAD

```
# My priorities

## Who I am
- [TITLE] at [COMPANY]
- [ONE LINE: WHAT THE COMPANY DOES]
- [ONE LINE: WHO WE SERVE]

## What matters this quarter
1. [TOP OUTCOME #1 + target date]
2. [TOP OUTCOME #2]
3. [TOP OUTCOME #3]

## Who matters most
- [NAME] ([ROLE]): [WHY, ONE LINE]
- [NAME] ([ROLE]): [...]
- [NAME] ([ROLE]): [...]

## Always flag
- Anything from [NAMES]
- Anything mentioning [DEAL / TOPIC]
- Invoices over $[AMOUNT], contracts, anything legal
Threads I owe a reply to [N] days
```

The [BLANKS] are the lever. Sharpen them, and the assistant gets noticeably better in one edit.

Copy-Paste

The Two Routines

Schedule these in Claude Co-work (Routines) or ChatGPT Projects (Scheduled Tasks). Drafts land in your inbox. You approve sends.

Daily Digest WEEKDAYS · 7:00 AM

COPY

DOWNLOAD

It's the start of a workday. Produce my Daily Digest using priorities.md, today's calendar, and unread email.

Settings (edit these)

- POSTURE: balanced – drafting aggressiveness. One of: aggressive (draft anything plausible, including first-pass replies to high-priority emails marked as such), balanced (default – draft scheduling/acks/known answers/polite declines), conservative (draft scheduling and acks only; suggest the rest).
- MAX_EMAILS: 7 – cap on emails surfaced in Inbox.

Today

3 lines max: the most important thing, the most-likely to derail, one optional opportunity worth 30 minutes.

Meetings

Every meeting today, chronological. For each: time, title, attendees, 1-line prep, link if present.

Confirmed scheduling (propose only – never create without my approval)

See replies in the last 24/48 hours to scheduling drafts I sent. For

Friday Recap FRIDAYS · 3:00 PM

COPY

DOWNLOAD

It's Friday afternoon. Produce my weekly recap and next-week plan using priorities.md, this week's calendar, and this week's email. Include transcripts if present.

Settings (edit these)

- INITIATIVE_COUNT: 3 – how many initiatives to defend time for next week.
- BLOCK_SIZE: 2-3 hours – preferred deep-work block duration.

First, ask me two things and wait for my answer

1. Which initiatives do I want to defend time for next week? Propose INITIATIVE_COUNT candidates based on priorities.md and what slipped this week, then confirm.
2. Anything personal, travel, or off-calendar I should plan around? Examples: travel days, family commitments, focused-writing time I haven't booked, doctor appointments.

Use my answers to shape the Next Week and Time Blocks sections below.

Week in one paragraph

What the week was about. Not a list. Lead with the most consequential thing

Run each one once now. If the output is off, edit **priorities.md**. That's where the lever lives, not in the routine prompt.

The CEO's Job

Clear the Path

The assistant only works if the workflow has context, access, and a clear approval line.

1

Give it **context**

Your role, company, priorities, tone, direct reports, meeting rhythm, and the decisions only you should make.

2

Give it **bounded access**

Email and calendar are enough for the first version. Add CRM, notes, and meeting transcripts only after the base routine is useful.

3

Set the **approval rules**

Drafts are fine. External commitments, customer messages, contracts, payments, and calendar changes need human approval.

4

Name the **next owner**

Find the person who can improve the workflow after today. The CEO should use the assistant, not become the help desk for it.

The CEO should define the judgment boundary. The assistant should handle the draft work inside it.

Take Home

The CEO Skill Pack

After the assistant, the next step is a library of copyable skills for recurring CEO work.

7

skills to copy, edit, and run

A clever demo fades. A reusable skill becomes a habit your company can keep improving.

Taking Action

What You Can Do This Week

1

Run the assistant for five days

Use the daily and weekly routines before you add integrations or more ambitious workflows.

2

Pick one company workflow

Choose the recurring process people complain about most: finance review, customer follow-up, vendor review, onboarding, or meeting follow-through.

3

Find the operator-engineer

Look for the person who already built the spreadsheet, automation, dashboard, or internal tool everyone depends on.

Workshop Recap

Build the CEO Assistant. Then make it useful.

The workshop was not about installing a tool. It was about creating one small assistant that knows your priorities, reads the right systems, drafts the routine work, and improves each week.

1

Create the project

Start a Claude/Cowork project for your EA, give it a name, turn memory on, and begin with one clear sentence about who it serves.

2

Connect the basics

Add email, calendar, and Drive or Microsoft 365. If admin approval blocks a connector, use copied email and calendar text first.

3

Paste the mad-lib

Use the project instructions to define the goal, available context, approval rules, writing style, and where the assistant should look.

4

Add priorities

Create a priorities file with your company, current quarter, key people, alert rules, voice, and anything the assistant must flag.

5

Schedule two routines

Run a daily digest for meetings, inbox triage, and reply drafts. Run a Friday recap for next week, blockers, follow-ups, and focus time.

6

Coach it weekly

Correct mistakes, start fresh chats inside the project, review memories, and add transcripts, CRM, or tasks only after the base loop works.

Start with one low-blast-radius loop: inbox + calendar become brief + drafts. You approve sends, commitments, and calendar changes.

Take It With You

Download the CEO skill pack

If you are seeing this, you already cleared the email gate. Download all seven skills, or click an individual skill card to grab only that file.

[Download All Skills](#)

[Download Deck PDF](#)

AI Enablement Coach
Finds use cases, chooses tools, and creates the first 30-day plan.
[DOWNLOAD SKILL](#)

CEO Time Leverage System
Triage inbox/calendar drag, draft replies, and protect focus time.
[DOWNLOAD SKILL](#)

Workflow-to-Agent Designer
Turns a repeated workflow into a skill, SOP, or Codex build brief.
[DOWNLOAD SKILL](#)

Operating Cadence Analyst
Reviews KPIs, rocks, notes, and projects for slippage and decisions.
[DOWNLOAD SKILL](#)

Strategic Decision Partner
Builds decision memos, pressure-tests assumptions, and proposes tests.
[DOWNLOAD SKILL](#)

Customer + Market Intelligence
Synthesizes calls, CRM, support, and competitor signals into action.
[DOWNLOAD SKILL](#)

Executive Narrative Builder
Creates board updates, investor notes, decks, and HTML artifacts.
[DOWNLOAD SKILL](#)

DECK LINK



slides.runpoint.ai/WSC-May-2026-v2

sam@runpoint.ai

runpoint.ai