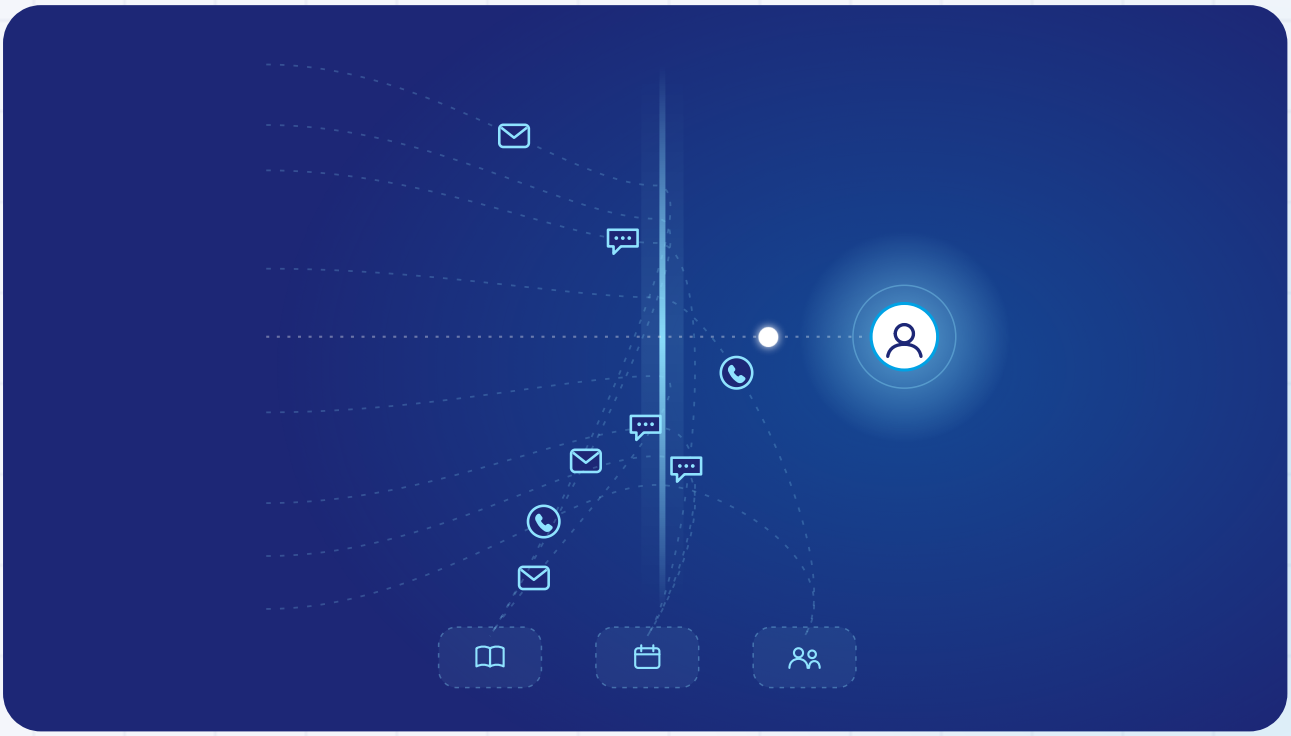
Quantum Business Transformation



THE CEO AI PLAYBOOK

The busy CEO and the assistant that never sleeps

How to build a personal assistant around your computer and your WhatsApp that answers, filters, schedules and reminds, so you only deal with what truly needs you.

30 days
From mapping to a workspace that works

10 quick wins
Each one built in under an hour

No ERP, no IT
A layer on top of what you already have

01 · THE PROBLEM

Most of what lands on your desk doesn't really need you

The goal of this guide: within 30 days, cut a large share of the calls and emails that come to you personally, without touching the ERP and without an IT project.

Written for owners and CEOs of mid-sized companies who run their day from the computer, email and WhatsApp. It's not about the company's systems. It's about your seat.

The CEO is the easiest address in the company: they know, they answer, they're on WhatsApp. That makes them their own bottleneck. Sort a week of requests and most fall into five groups. Only the last is yours.

Type of request	Example	Who handles it after setup
Answer already exists	“Price for this client?” “Procedure?”	Answered from the standard-answers doc
Routine approval	Small price exception, a day off	A delegation rule; you see a summary
Scheduling	“When works next week?”	The assistant books against your calendar
FYI update	“Just so you know…”	Into the daily briefing, not your day
A decision that's truly yours	Key customer, crisis, people issue	You, with a briefing ready

> **The assistant isn't there to decide for you.**
> **It's there to keep the first four rows away from you.**

02 · THE PRINCIPLE

Leave the systems alone. Build a layer on top of your seat.

The ERP, CRM, task management and bookkeeping (such as Priority, monday, CommBox or Avra) stay put, and over time the brain connects to them too. Your assistant sits on six things that are truly yours: email, calendar, WhatsApp, files, meetings, and the knowledge in your head.

1

Connect, don't replace

Works with the email and calendar you have: Google Workspace or Microsoft 365.

2

Start with one job

Not “run my life,” but “prep my morning briefing.” Once it works, add the next.

3

Draft before sending

Month one: it drafts, you approve. Auto-send only once trust is built.

Five layers of a CEO workspace

1 **The work brain on your computer**
An AI assistant connected to email, calendar and files, with agents and scheduled tasks
Claude · ChatGPT · Copilot

2 **The conversation channel on your phone**
Talk to it on WhatsApp or by voice note; it acts in your email and calendar
Instinct · Lindy · Hermes

3 **Email and calendar**
Sorting by urgency, drafts in your style, protecting quiet hours
An agent, not another tool

4 **Memory**
A knowledge vault: procedures, decisions, standard answers. Files that belong to you
Obsidian

5 **Meetings and calls**
Recording, summary and tasks with an owner and a date, straight into the vault
Granola · Fireflies · Plaud

Tool names are examples as of November 2026. The market changes month to month; the layers don't.

What each layer takes off your plate

Layer	What it does	Example tools	What it takes off you
1. The work brain	Connected to email, calendar and files; runs scheduled tasks and builds role-based agents	Claude or ChatGPT, or Copilot / Gemini to match your existing systems	Summaries, drafts, briefings, task tracking
2. The conversation channel	Talk to it on WhatsApp or by voice; it acts in your email and calendar	Instinct invite only, Lindy, or Hermes Agent advanced	Scheduling calls, “remind me,” “book it” on the road
3. Email and calendar	Sorting by urgency, drafts in your style, quiet hours	An agent built inside the Layer 1 brain, with its own job description	Scheduling ping-pong, emails that aren't meant for you
4. Memory	A personal vault of procedures, decisions, answers and contacts	Obsidian	Explaining the same thing for the twentieth time
5. Meetings	Recording, summary, tasks with an owner and a date	Granola, Fireflies, or a wearable recorder like Plaud. **check language support before buying**	Manual summaries and “what did we agree back then?”

The tools, in plain words

What each tool does, what it looks like day to day, and who it suits. Pick one per layer.

Claude · ChatGPT

Layer 1

The leading AI assistants. They connect to email, calendar and files, and do real work: summarize, draft and run recurring tasks on their own.

For example: Every Sunday at 7:00, one page: the five decisions waiting for you this week.

Good for: Anyone who wants one brain to build all the agents on. Pick one, not both.

Copilot · Gemini

Layer 1

Microsoft's and Google's AI, inside the apps you already use: email, documents, spreadsheets and meetings.

For example: Teams: “What did I miss, and what do they need from me?” Excel: “Who dropped most this quarter?”

Good for: A company fully on Microsoft 365 or Google Workspace that wants to stay in-house.

Instinct

Layer 2

An assistant with no app. You text it on WhatsApp or call it, and it acts in your email, calendar and other services.

For example: In traffic: “Move Danny to tomorrow after 2 and email him.” It does it and reports back.

Good for: People who live on WhatsApp. Invite only for now, and it wants broad access: start with one task.

Lindy

Layer 2

A ready-made executive assistant: sorts email, preps meetings, sends reminders. You message it.

For example: Morning: “3 meetings today. Here's who's coming and two draft replies. Send?”

Good for: Anyone who doesn't want to build anything. It drafts, you approve.

Obsidian

Layer 4

Text files on your computer: procedures, decisions, standard answers. The assistant reads and writes them.

For example: A weekly pricing question? The approved answer is in the vault, and the assistant drafts from it.

Good for: Anyone who explains the same thing again and again. Your files, not a vendor's.

Granola

Layer 5

A smart meeting notepad. Jot a few words and it builds a clean summary with tasks. No bot joins the call.

For example: Typed only “price / timeline” on a Zoom? You get a summary, owners, dates and a follow-up.

Good for: A manager who wants calm. Tell participants up front that notes are being taken.

Fireflies

Layer 5

A bot that joins Zoom, Meet or Teams, transcribes, summarizes and keeps a searchable call archive.

For example: “What did they say about budget in the last three meetings?” Answered from every recording.

Good for: A sales or management team that wants a shared archive. Everyone sees the bot on the call.

Plaud

Layer 5

A small recorder you clip to your clothes. One press, and the app gives you a transcript, summary and tasks.

For example: A plant tour with the production manager, no laptop, and a full summary at the end.

Good for: Face-to-face meetings. Not for phone calls, and check language support before buying.

Hermes Agent, the advanced Layer 2 option: next page. Layer 3, email and calendar, is an agent built inside the Layer 1 brain.

04 · OUR RECOMMENDATION

Build agents close to the brain, don't buy a tool for every task

A tool for every task sounds simple, and ends with five subscriptions, five logins and five memories that don't talk to each other.

The brain is the AI assistant already working for you: Claude, ChatGPT, or Copilot and Gemini if you run on Microsoft or Google. An agent built inside it uses the same email, calendar and knowledge vault, and learns from a single correction. An agent has four parts: a project in your chosen brain, a one-page job description, connections to email, calendar and files, and a scheduled task.

Agent	What it does	When it runs
The briefing agent	One page: what's urgent, what's on the calendar, who's waiting for an answer	Every morning at 7:00
The email agent	Sorts into three labels and prepares drafts in “Me only”	Several times a day
The calendar and meetings agent	Suggests times, prepares a briefing before each meeting and a summary after	Based on the calendar
The commitments agent	Logs what was delegated to whom, and reminds you what's still open	Once a week

An agent's job description is a one-page document: what it does, what it must not do, what tone it writes in, and who approves what it sends out. Exactly like defining the role of a new employee.

What about Hermes?

Hermes Agent by Nous Research is an open-source personal agent installed on your computer or server. It talks via WhatsApp, Telegram, Slack and email, builds its own skills from its work, and remembers over time.

When it fits

A CEO who wants to run everything from WhatsApp, keep full control of the data, and has a technical person close at hand.

When it doesn't

When there's no one to maintain it. The software is free, but you pay separately for the AI model, and someone has to install, update and secure it.

The recommended path for most CEOs: start with agents on the brain you chose. If after two months the work moves mostly to WhatsApp, consider Hermes as an extra layer.

05 · QUICK WINS

Ten quick wins for week one

Each one takes less than an hour to build, and each one removes a particular kind of request. Start with the first three.

1 **An automatic morning briefing**

Every morning at 7:00, one page: what's urgent in your inbox, what's on the calendar, who's waiting for an answer.

2 **A “standard answers” document**

The 20 questions that come back to you every week, with your answer, in the vault. The assistant and the team answer from it.

3 **Three email labels**

“Me only,” “For the assistant,” “FYI.” The assistant sorts; you only open the first.

4 **Draft replies ready to go**

Every email in “Me only” arrives with a draft. Fix a word and send.

5 **Scheduling without ping-pong**

A booking link, or an assistant that schedules against your calendar, in windows you set in advance.

6 **A briefing before each meeting**

Who the person is, what was agreed last time, what's still open. Arrives fifteen minutes before.

7 **A meeting summary with tasks**

What was decided, who owns it, by when. You approve and it goes out to the participants.

8 **A voice note instead of a call**

“Draft a reply to Yossi,” “remind me on Tuesday.” It prepares, you approve.

9 **Commitment tracking**

Once a week: what was delegated and what's still open with others. No chasing by phone.

10 **A fixed “phone hour”**

A daily window for calls. Outside it, the assistant replies by message and suggests a time. The hardest one, and the one that pays off most.

Only have an hour this week?

Start with **1**, **2** and **3**. The morning briefing shows you how much of your day actually belongs to other people. The standard-answers document gets you out of the questions that keep coming back. The labels give you your inbox back. Everything else builds from there.

06 · WHO DOES WHAT

AI doesn't replace your assistant. It multiplies them.

Who	Role	Time
The CEO	Decides what to delegate, approves drafts, corrects the assistant when it gets things wrong	30 minutes of fine-tuning a week
Personal assistant or chief of staff	Runs the tools day to day, maintains the answers document, handles whatever needs human judgment	Part of the regular workload
IT and information security lead	Approves which tools connect, with what permissions, and each tool's data policy	One-time, at setup
The senior team	Gets a new working agreement: who to go to instead of the CEO, and what they can decide on their own	One conversation at the start
An outside guide	Mapping, tool selection, setup, agent job descriptions and training	Four weeks of setup

07 · SAFETY & TRUST

Start narrow; expand only once it has proven itself

An assistant connected to a CEO's email sees everything. The advice from people who test new tools: one job, minimum data, and no permission to send, buy or order before a review.

- **Drafts only at first.** Nothing goes out without your approval.
- **No money and no passwords.** The assistant doesn't make payments or approve transfers.
- **Data policy.** Check where the data is stored and whether it's used for training. A business account, not a personal one.
- **Very new tools, with caution.** Connect only what's needed.
- **Transparency.** Anyone who gets a message from the assistant knows it's an AI assistant.
- **Law and privacy.** Check your organization's obligations under privacy law with your legal counsel.

Four weeks, one stage per week

1

Mapping

Five working days of logging requests: who reached out, through which channel, about what, and whether you really had to be involved.

2

The basic package

An assistant on your computer connected to email and calendar, a morning briefing, labels, and a standard-answers document in the vault.

3

WhatsApp, meetings and the team

An assistant on your phone, meeting summaries, and a conversation with the team about the new working agreement.

4

Measure and improve

Log requests again, compare with week 1, and choose the next agent worth building.

Two sizes

Basic

Layers 1, 3 and 4: an assistant on your computer connected to email and calendar, plus a knowledge vault.

For every CEO, from week one.

Full

All five layers, including a WhatsApp assistant and a meeting summarizer.

For a CEO who spends most of the day out of the office or in meetings.

What to measure

Metric	How to measure it	Suggested target after 30 days
Incoming calls per day	Request log, week 1 vs. week 4	Down by a third
Emails that needed you personally	Number of emails in the “Me only” label	Down by half
Quiet hours per day	Blocks of an hour or more without interruption	At least two hours
Response time to the team	How long people wait for your answer	Shorter, not longer

The targets are a starting point for discussion, not a promise. Your number gets set in the mapping week.

09 · NEXT STEP

Tools free up time.
Management changes the picture.

The real change happens when a CEO asks why the requests came to them in the first place.

The mapping week usually reveals three gaps: a missing procedure, missing authority, and people not yet comfortable deciding alone. An AI assistant closes the first. Management development closes the other two: delegation, accountability, and a culture where middle managers decide.

Workspace setup. Mapping, tools, setup and agent job descriptions, up to a full CEO control center.

Management coaching. Working with the CEO and senior team on delegation and decisions.

Executive development journeys. For owners and CEOs who want to see how outstanding organizations work differently.

Want to start with the mapping week? www.ran-q.com

WEBSITE
www.ran-q.com

OFFICE WHATSAPP
+972 54 242 2632

EMAIL
info@ran-q.com

Some of the companies we've worked with

Written by GAI, the strategy agent of ran-Q's AI team, led by Ran Quantz. November 2026.

Sources: Built In – What Is Instinct AI · Instinct: Start With One Job · Hermes Agent · Hermes Agent research · Composio – AI executive assistant