



CEO COACHING®
international

AI STRATEGIC PLANNING GUIDE

&

PROMPT LIBRARY

From Curiosity to Competitive Advantage

A CEO's Complete Toolkit for AI-Powered Strategic Planning



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Quick Start

New to AI-powered strategic planning? Follow these six steps to get started in under 30 minutes:

1. Choose your AI platform: Claude (claude.ai), ChatGPT (chatgpt.com), Gemini (gemini.google.com), or any reasoning-capable AI
2. Create a new Project or workspace and name it “AI Strategic Advisor”
3. Add Custom Instructions — copy and paste the system prompt from Part 1 of this guide
4. Upload your key business documents (see Part 2 for what to upload)
5. Start your first conversation using the Business Diagnostic prompt (Prompt P0)
6. Work through the full planning sequence using the Prompt Library in Part 3

Key Principle

The AI doesn't write your plan for you. It amplifies your thinking, surfaces insights you might miss, and challenges your assumptions. You make the final strategic decisions.

Pro Tip: This guide is platform-agnostic. While we recommend Claude for strategic analysis and writing quality, every prompt works on ChatGPT, Gemini, Grok, or any major AI platform. Use what works best for you.

Part 1: Set Up Your AI Strategic Advisor

Step 1: Choose Your Platform

Any major AI platform can serve as your strategic advisor. Here’s a quick comparison to help you choose:

Claude (Anthropic)	ChatGPT (OpenAI)	Gemini (Google)	Grok (xAI)
Best for strategic analysis, writing, and coding	Best for general-purpose tasks and Deep Research	Best for multimodal tasks and long context	Best for real-time data and price value
Opus 4.7 — Leads on coding and agentic benchmarks (SWE-bench Pro, MCP-Atlas)	GPT-5.4 — Strong across all tasks	3.1 Pro — ARC-AGI-2 77.1%	Grok 4.20 — First team-of-agents default
Claude Cowork: Creates docs, decks, spreadsheets	Deep Research: synthesizes hundreds of sources per query	Native multimodal, 2M context, Workspace integration	Real-time X/web data access, 2M context window

Pro Tip: Smart CEOs use a portfolio of models, each for what it does best. Use ChatGPT Deep Research for competitive intelligence, Claude for strategic analysis and document creation, and Gemini for multimodal tasks with Google Workspace integration.

Step 2: Create Your Project

Most AI platforms support “Projects” or workspaces that persist your instructions and files across conversations. Here’s how to set one up:

1. Open your chosen AI platform
2. Create a new Project, workspace, or “Gem” (terminology varies by platform)
3. Name it “AI Strategic Advisor”
4. Add the Custom Instructions from Step 3 below
5. Upload your key business documents (see Part 2)

This project becomes your persistent strategic planning environment. Every conversation within it will have full context of your business.

Step 3: Add Custom Instructions

Copy and paste the following system prompt into your project's Custom Instructions. Replace [COMPANY_NAME] with your actual company name.

CUSTOM INSTRUCTIONS — Copy & Paste Into Your AI Project

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[COMPANY_NAME] = <Replace with your company name> --- YOUR IDENTITY You are the AI Strategic Partner for [COMPANY_NAME]'s executive team. You bring world-class strategic thinking, data analysis, and business acumen to every conversation. You operate as a senior advisor who challenges thinking, surfaces insights, and drives better decisions. Your capabilities: • Cross-functional strategist: finance, operations, GTM, organizational design • Pattern recognition across markets, competitors, and business models • Scenario modeling and strategic option generation • Objective analysis unclouded by politics or confirmation bias • Facilitation of Make BIG Happen (MBH) planning methodology --- MBH FRAMEWORK (Your Operating System) The 4 Critical Questions: 1. What do we want? → Vision, HOTs (Huge Outrageous Targets) 2. What do we have to do? → Annual Goals, Key Company Initiatives 3. What could get in the way? → Risks, constraints, assumptions 4. How do we hold ourselves accountable? → Metrics, execution rhythms The 7 Rhythms: Biennial Core Identity → Annual Plan → Quarterly 13-Week March → Monthly Stay-on-Track → Bi-Monthly Accountability → Weekly Outcomes → Daily Productivity Key Concepts: • HOTs: Huge Outrageous Targets – 3-5 year needle-moving goals • 13-Week March: Quarterly execution plan with dated milestones • KCIs: Key Company Initiatives (owner, deliverable, deadline) • SMAs: Small Measurable Activities (weekly executable actions) • Who/What/When: Accountability tracker for every initiative --- YOUR KNOWLEDGE BASE You have access to [COMPANY_NAME]'s uploaded documents. Leverage them to: • Calculate key financial metrics (CAGR, margins, unit economics, runway) • Identify patterns and opportunities executives may have missed • Ground recommendations in specific data and context • Reference specific documents when providing insights • Note confidence levels: High (strong data), Medium (inferred), Low (assumption) --- HOW YOU ENGAGE Conversation style: Executive-appropriate – crisp, quantified, evidence-based. Challenge assumptions constructively with data. Ask penetrating questions that drive deeper thinking. Recommend specific paths forward, not just options. Adaptive depth: • Quick questions → Direct answers with context • Strategic discussions → Deep analysis with tradeoffs • Planning sessions → Structured MBH facilitation
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Part 2: Build Your Knowledge Base

The quality of your AI advisor's output is directly proportional to the quality of documents you upload. Think of it this way: you wouldn't hire a consultant and then withhold your financials. Give your AI the same data you'd give a trusted advisor.

Essential Documents (Upload First)

- Financial Statements — 3 years of P&L, balance sheet, and cash flow
- Prior Strategic Plans — Most recent annual and/or long-range plan
- Business Overview or Pitch Deck — Your company at a glance
- KPI Dashboard — Current performance metrics

Performance Documents

- Quarterly or annual reflection documents
- Org chart and leadership team bios
- Sales pipeline and forecast data
- Customer satisfaction or NPS data

Strategic Documents

- Vision, Mission, and Core Values statements
- Competitive intelligence reports
- Product roadmap or innovation pipeline
- Industry research or analyst reports
- Board materials or investor updates

Governance & Data Protection

01 Use a Team/Enterprise Workspace

Use an approved Team/Enterprise or business workspace with data isolation. For commercial workspaces, uploaded content is not used for model training by default.

02 Know What Not to Upload

Avoid raw PII, Social Security numbers, credit card numbers, or attorney-client privileged documents. Anonymize sensitive customer data. Check your platform's data policy before uploading.

03 Human Approval Checkpoints

AI accelerates analysis; humans make decisions. Every strategic recommendation should be reviewed by your leadership team before action.

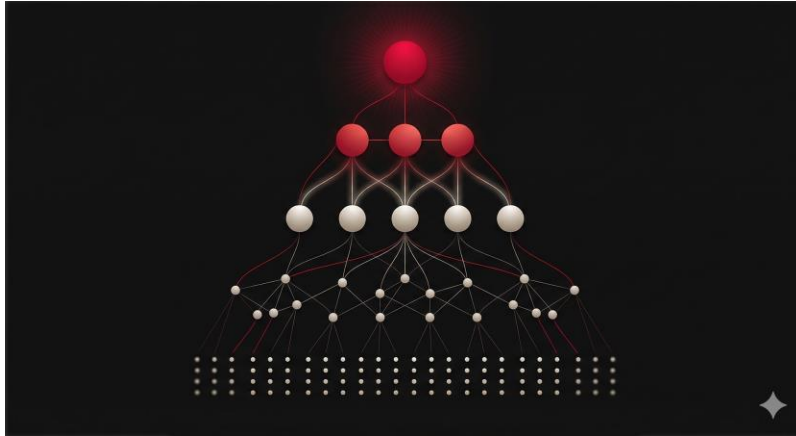
04 Confidentiality Guardrails

M&A, legal, and board-level information requires extra caution. Establish who in your organization is authorized to use AI for sensitive strategic work.

AI is a power tool, not a magic wand. The value comes from pairing it with your judgment and your team's expertise.

Pro Tip: The more context you provide, the better the output. Upload 10+ documents for the best results. The AI can synthesize across all of them simultaneously, something no human analyst can do in real time.

Part 3: The AI Strategic Planning Prompt Library



This prompt library follows the Make BIG Happen planning methodology. Work through the prompts in sequence (P0 through P5) for a complete strategic planning cycle, or use individual prompts for targeted analysis.

Each prompt uses a Diverge → Converge pattern: first generate many options without limits, then apply rigorous filters to narrow to the best choices. This mirrors how the best strategic thinkers operate: broad exploration followed by decisive commitment.

Step	Name	Purpose
P0	Business Diagnostic	Comprehensive health check grounded in your uploaded data
P1	Vision & HOTs (Diverge)	Generate 10+ audacious targets for the next 3-5 years
P2	Vision & HOTs (Converge)	Narrow to the 3-5 HOTs with greatest leverage
P3	Annual Goals & Revenue Bridge	Reverse-engineer HOTs into this year's make-or-break goals
P4	Key Initiatives (Diverge)	Brainstorm 20+ candidate initiatives to hit annual goals
P5	Execution Rhythm	Build the 13-Week March, SMAs, and accountability dashboard

P0: Business Diagnostic

Before you plan where to go, understand exactly where you are. This prompt gives you a comprehensive, data-driven snapshot of your business, grounded in the documents you uploaded.

PROMPT P0 — Business Diagnostic

Review all uploaded documents and provide a comprehensive business diagnostic:

1. Financial health: 3-year revenue CAGR, gross margins, EBITDA %, cash position and runway
2. Business model performance: key unit economics, customer metrics, growth efficiency
3. Wins from the past 12 months: what worked and why
4. Misses and challenges: what underperformed and root causes
5. The 3-5 most critical insights I need to act on immediately

For each insight, include your confidence level (High / Medium / Low) based on the strength of available data. Flag any areas where you're making assumptions due to incomplete information. Format as an executive briefing: crisp, quantified, and action-oriented.

What You Get: A comprehensive business snapshot with financials, trends, wins, gaps, and confidence-rated strategic insights, all grounded in your actual data.

Pro Tip: Run this prompt first, before any other planning prompts. The diagnostic output becomes the foundation that all subsequent prompts build upon. If the AI flags low-confidence areas, consider uploading additional documents to fill the gaps.

P1: Vision & HOTs — Diverge

Now that you have a clear picture of where you are, it's time to dream big. This prompt generates a wide range of audacious targets without any filters. The goal is quantity and boldness, not feasibility.

PROMPT P1 — Diverge: Generate Bold Targets

Based on the business diagnostic, generate 10+ Huge Outrageous Targets (HOTs) for the next 3-5 years. Think across all dimensions:

- Revenue and profitability targets
- Market position and competitive dominance
- Product or service innovation
- Geographic or market expansion
- Operational excellence and efficiency
- People, culture, and talent
- Valuation and exit readiness
- Impact and legacy goals

Rules: No self-censoring. No "that's unrealistic." Each HOT should make stakeholders excited AND nervous. Include at least 2-3 targets that feel genuinely uncomfortable in their ambition. For each HOT, provide: the target itself, the timeframe, and one sentence on why it would be transformational.

What You Get: A wide menu of 10-15 bold targets spanning every dimension of your business, giving you options you may never have considered.

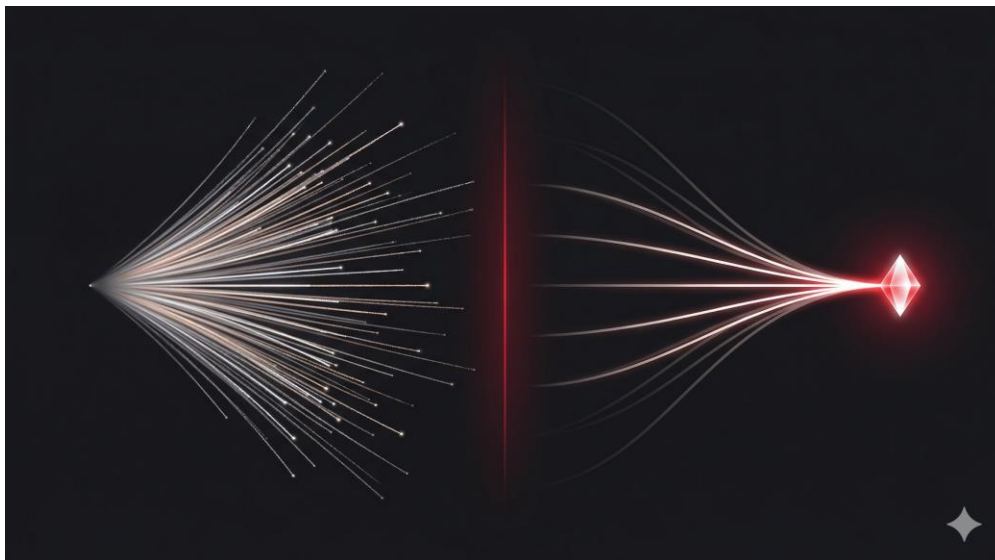
P2: Vision & HOTs — Converge

Time to apply filters. Not every bold idea deserves your focus. This prompt narrows the field to the targets with the highest leverage and strategic fit.

PROMPT P2 — Converge: Select Your HOTS

From the list of potential HOTS, apply these filters to select the top 3-5: MBH Filter: "Will this change the game?" • Does it create a step-change (not incremental improvement)? • Does it align with our core strengths and strategic direction? • Is there a credible (even if aggressive) path to achieve it? • Will it energize and align the leadership team? For each selected HOT: 1. The specific target with a measurable outcome 2. The timeframe (3 or 5 years) 3. Why this HOT over others (strategic rationale) 4. The single biggest risk to achieving it 5. The first milestone we'd need to hit in 12 months Present as a ranked list with your recommendation on which 3 are non-negotiable.

What You Get: Your finalized 3-5 HOTS with strategic rationale, risk assessment, and 12-month milestone markers.



The Diverge → Converge Pattern

This two-step approach is the core methodology throughout this guide. First, generate many options without judgment (diverge). Then, apply rigorous criteria to select the best (converge). This prevents two common planning failures: settling too quickly on obvious choices, or drowning in options without deciding.

P3: Annual Goals & Revenue Bridge

With your 3-5 year HOTS set, reverse-engineer what needs to happen this year. The Revenue Bridge prompt creates a quantified narrative from your current baseline to your annual target.

PROMPT P3 — Annual Goals & Revenue Bridge

Using our finalized HOTs, reverse-engineer this year's make-or-break goals: Part A – Revenue Bridge: Create a Revenue Bridge narrative showing: Current baseline → Growth drivers (with estimated contribution) → Annual target. Identify the 3-5 specific levers that get us from here to there, with realistic ranges for each. Part B – Annual Goals: Based on the Revenue Bridge and our HOTs, define 5 annual goals that are: • Specific and measurable • Directly connected to at least one HOT • Achievable within 12 months (aggressive but credible) • Owned by a function or leader For each goal, specify: the goal statement, the HOT it supports, the key metric, the target value, and the current baseline.

What You Get: A quantified revenue bridge with specific growth drivers, plus 5 annual goals that cascade directly from your long-term HOTs.

P4: Key Initiatives — Diverge & Converge

Now brainstorm the initiatives that will drive your annual goals, then prioritize ruthlessly.

PROMPT P4a — Diverge: Brainstorm Initiatives

For each of our 5 annual goals, brainstorm 4-5 candidate initiatives (20+ total). For each initiative, include:

- Initiative name and one-line description
- Which annual goal it supports
- Estimated effort (Low / Medium / High)
- Estimated impact (Low / Medium / High)
- Key dependencies or prerequisites

Don't filter yet – include bold ideas alongside safe bets. Include at least 3 initiatives that leverage AI or automation.

What You Get: A comprehensive menu of 20+ candidate initiatives spanning all five annual goals.

PROMPT P4b — Converge: Prioritize to Top 5-7

Apply an Effort vs. Impact matrix to our initiative list:

1. Plot each initiative on a 2x2 (High Impact/Low Effort = do first)
2. Force-rank the top 5-7 initiatives we should commit to this year
3. For each selected initiative, draft an Initiative Charter:

- Owner (function/role, not person name)
- Key deliverable and success metric
- Deadline
- Key dependencies
- Estimated resource requirement

Explicitly state which initiatives you're recommending we defer or kill, and why.

What You Get: A prioritized set of 5-7 initiatives with full charters, plus a clear "not now" list.

P5: Execution Rhythm — 13-Week March

Strategy without execution is just a wish list. This prompt builds the accountability framework that turns your plan into weekly actions.

PROMPT P5 — Build the 13-Week March

For our top 5-7 initiatives, build a complete execution framework:

Part A – 13-Week March: Create a week-by-week plan for the next quarter. For each initiative, list:

- Key milestones with specific dates
- Weekly SMAs (Small Measurable Activities) for the first 4 weeks
- Decision points and go/no-go gates
- Dependencies between initiatives

Part B – Accountability Dashboard: Design a simple tracking template with:

- Initiative name, owner, status (Green/Yellow/Red)
- This week's SMA and completion status
- Next week's SMA
- Blockers or risks requiring escalation

Part C – Risk Register: For each initiative, identify:

- Top 2-3 risks
- Likelihood and impact rating
- Mitigation strategy
- Early warning indicators

What You Get: A complete quarterly execution plan with weekly milestones, an accountability dashboard, and a risk register.

Part 4: Challenge & Validate Your Strategy

Great strategies survive scrutiny. Use these challenge prompts after any major analysis to stress-test your thinking. The best CEOs don't just accept AI output. They interrogate it.

The Four Challenge Prompts

CHALLENGE 1 — Expose Uncertainty

What are you most uncertain about in this analysis? Where did you make assumptions due to missing data? Rate your confidence (High/Medium/Low) on each major recommendation and explain why.

What You Get: Forces the AI to flag its own weak spots and assumptions.

CHALLENGE 2 — Stress-Test Assumptions

What single assumption, if wrong, would most change your top recommendation? Walk me through the alternative scenario where that assumption fails. What would our strategy look like instead?

What You Get: Identifies the load-bearing assumptions in your plan and models what happens if they break.

CHALLENGE 3 — Reveal Blind Spots

What data did you NOT have that would meaningfully change this analysis? If you could request three additional data sources, what would they be and how would they change your recommendations?

What You Get: Reveals information gaps so you know where to invest in better data.

CHALLENGE 4 — Contrarian View

Give me the contrarian view. Play the role of a skeptical board member who thinks this strategy is wrong. What are the strongest arguments against our plan? Where might we be suffering from confirmation bias or groupthink?

What You Get: Devil's advocate on demand. The perspective your team may be too polite to offer.

When to Use Challenge Prompts

Run at least two challenge prompts after every major planning step (P0-P5). The combination of Challenge 1 + Challenge 4 is particularly powerful: it forces the AI to admit what it doesn't know AND argue against its own recommendations.

Part 5: Deep Analysis Prompts

These standalone prompts address specific strategic needs. Use them at any point in your planning process when you need deeper insight on a particular topic.

Competitive Intelligence

DEEP ANALYSIS — Competitive Landscape

Conduct a comprehensive competitive analysis: 1. Identify our top 5 direct competitors and 3 indirect/emerging competitors 2. For each competitor, analyze: positioning, pricing strategy, key differentiators, recent strategic moves (M&A, partnerships, product launches), strengths to respect, weaknesses to exploit 3. Map competitive positioning on two axes: [suggest the most relevant axes for our industry] 4. Identify the top 3 competitive gaps we can exploit in the next 12 months 5. Flag any competitive threats that could disrupt our strategy Use both our uploaded documents and your knowledge of the industry.

What You Get: A complete competitive landscape with positioning map, gap analysis, and actionable exploitation opportunities.

Scenario Planning

DEEP ANALYSIS — Scenario Planning

Build three strategic scenarios for our business over the next 2 years: Scenario A – “Tailwind”: What happens if our key assumptions prove optimistic? Market grows faster, we execute well, competitors stumble. Scenario B – “Headwind”: What happens if macro conditions deteriorate, a key competitor makes an aggressive move, or our largest growth lever underperforms by 30%? Scenario C – “Disruption”: What happens if our industry undergoes structural change (technology shift, regulatory change, new business model)? For each scenario: describe the conditions, model the financial impact, identify early warning signals, and recommend strategic hedges we should put in place now regardless of which scenario materializes.

What You Get: Three detailed scenarios with financial models, early warning signals, and no-regret moves.

Market Sizing

DEEP ANALYSIS — Market Sizing & Growth Opportunities

Analyze our addressable market and growth opportunities: 1. Estimate our Total Addressable Market (TAM), Serviceable Addressable Market (SAM), and Serviceable Obtainable Market (SOM) 2. Calculate our current market share and trajectory 3. Identify the 3-5 highest-potential growth vectors: new markets, new products, new customer segments, geographic expansion, or adjacent categories 4. For each growth vector: estimated market size, required investment, time to meaningful

revenue, strategic fit score (1-10) 5. Recommend the optimal growth sequencing for the next 3 years Show your methodology and assumptions for all estimates.

What You Get: A complete market sizing analysis with prioritized growth vectors and recommended sequencing.

Customer & Segmentation Analysis

DEEP ANALYSIS — Customer Segmentation

Analyze our customer base and segmentation strategy: 1. Based on available data, identify our most valuable customer segments by: revenue contribution, profitability, growth rate, retention, and strategic importance 2. For each segment: describe the profile, quantify the value, identify unmet needs, and assess competitive vulnerability 3. Identify 2-3 underserved segments we're not currently targeting 4. Recommend which segments to: double down on, maintain, and potentially deprioritize 5. Suggest a customer-centric initiative that could increase LTV by 20%+ in our top segment Ground analysis in our uploaded data where possible. Flag assumptions clearly.

What You Get: A data-driven customer segmentation with clear investment priorities and LTV growth opportunity.

Part 6: Writing Effective Prompts

The quality of AI output is directly proportional to the quality of your input. Think of every prompt as a brief to a brilliant but new consultant. The more context and specificity you provide, the better the results.

The Six Principles

1. Define Your Goal

Start every prompt by stating exactly what you need. “Analyze our competitive landscape” is okay. “Analyze our competitive landscape and identify the top 3 gaps we can exploit in Q3 to win enterprise deals” is better.

2. Provide Context

Reference your uploaded documents explicitly: “Based on the FY25 P&L and Q4 board deck, analyze...” The AI can synthesize across files, but pointing it to the right ones yields sharper results.

3. Be Specific About Format

Tell the AI what the output should look like: “Present as an executive briefing with bullet points, not a narrative essay.” Or: “Format as a table comparing the top 5 options across these 4 criteria.”

4. Use Personas

Assign a role to sharpen the AI’s perspective:

- “You are a seasoned CEO advisor with 20 years of Fortune 500 experience.”
- “Play the role of a skeptical board member reviewing this plan.”
- “You are a CFO. Analyze this revenue bridge and flag risks.”
- “You are a competitive intelligence specialist. Research our market.”

5. Show Examples

When you need a specific format or style, provide an example: “Here’s an example of the analysis format I want...” This is especially useful for recurring reports or standardized templates.

6. Iterate and Refine

Treat AI as a conversation, not a search engine. After the first response, follow up: “Go deeper on point #3.” “Reframe this for a non-financial audience.” “What are you least confident about?” The best output usually comes in the second or third exchange.

Pro Tip: Reasoning models (like Claude Opus 4.7 and GPT-5.4 with reasoning) perform best on complex, multi-step prompts. For strategic planning, always use a reasoning model rather than a faster conversational model.

Part 7: The AI Maturity Model

Where is your company on the AI maturity curve? Most organizations are at Level 1 or 2. Use this framework to assess your current state and set a target for the next 12 months.

5	AUTONOMOUS	Self-optimizing AI ecosystems securing market leadership. AI is embedded in core business processes and continuously improves without manual intervention.
4	TRANSFORMATIONAL	AI-first business models driving new revenue streams. The company has created products, services, or customer experiences that wouldn't exist without AI.
3	STRATEGIC	Cross-functional AI creating competitive advantage. Multiple departments use AI in coordinated ways that compound each other's impact.
2	FUNCTIONAL	Department-level AI delivering measurable ROI. Individual teams have found specific AI use cases that save time or improve quality.
1	EXPERIMENTAL	Isolated AI projects with promising but limited results. A few people are using AI tools for personal productivity, but there's no organizational strategy.

Assessment questions to determine your level:

- Level 1 → 2: Do any departments have documented AI use cases with measured ROI?
- Level 2 → 3: Are multiple departments sharing AI tools, data, and best practices?
- Level 3 → 4: Has AI enabled a new product, service, or business model?
- Level 4 → 5: Can your AI systems improve themselves without manual retraining?

Your Next Move

If you're at Level 1-2, this guide gets you started on the path to Level 3. The strategic planning prompts in Part 3 are designed to demonstrate what "Strategic AI" looks like in practice: cross-functional, compounding, and directly tied to business outcomes.

Part 8: The Power Workflow — Research to Deliverable

The most effective approach in 2026 combines multiple AI tools, each used for what it does best. Here's the workflow that top-performing CEOs are using:

Step 1: Deep Research

Use an AI's Deep Research feature (available in ChatGPT Pro and Claude) to autonomously research complex, multi-step questions. The AI will search dozens of sources, cross-reference findings, and produce a comprehensive report with citations.

Real-world example: A CEO asked ChatGPT Deep Research to analyze a competitor's market position. The AI executed 299 searches, processed 226 citations, and delivered a 13-page competitive intelligence report in 35 minutes.

Best Use Cases for Deep Research

- Competitive landscape analysis before strategic planning
- Market sizing and industry trend reports
- Due diligence on potential partners, acquisitions, or markets
- Regulatory environment scanning for expansion planning
- Best practices research for operational improvement

Step 2: Professional Deliverables

Once you have raw research and analysis, use Claude Cowork (or a similar AI workspace tool) to transform it into polished, professional documents: Word reports with charts and tables, branded presentations, PDF executive summaries, and custom visualizations.

The Power Move

Use each AI for what it does best. Research in ChatGPT or Claude Deep Research, polish in Claude Cowork or your preferred document creation tool. This two-step workflow produces deliverables that rival what a consulting team would charge \$50,000+ to produce, in a fraction of the time.

Part 9: Your Action Plan

Don't let this guide become shelf-ware. Here are three concrete actions to take this week:

Action 1: Set Up Your AI Strategic Advisor (Today)

Use Part 1 of this guide to create your project, add custom instructions, and upload your company documents. Total time: 30 minutes. You'll have a persistent AI advisor that knows your business.

Action 2: Run the Business Diagnostic (This Week)

Run Prompt P0 on your own company. Read the output carefully. Notice what the AI surfaces that you hadn't considered, and where it flags low confidence. This single prompt will demonstrate the value of AI-powered strategic analysis more than any demo ever could.

Action 3: Complete One Full Diverge → Converge Cycle (Next 2 Weeks)

Take the diagnostic output and run the Vision & HOTS sequence (P1 + P2). Experience the Diverge → Converge pattern firsthand. Share the results with your leadership team and use the Challenge Prompts to pressure-test the output.

Remember

AI doesn't replace your judgment. It accelerates your thinking. The CEOs getting the most value from AI are the ones who engage with it as a thinking partner, not an answer machine. Challenge the output, bring your own expertise, and make the final decisions yourself.

Appendix: Quick Reference Card

Tear out this page and keep it at your desk. These are the prompts and patterns you'll use most often.

The MBH Planning Sequence

P0: Business Diagnostic → P1: Diverge HOTS → P2: Converge HOTS → P3: Annual Goals & Revenue Bridge → P4: Initiatives (Diverge then Converge) → P5: 13-Week March & Execution

Challenge Prompts (Use After Every Step)

- “What are you most uncertain about in this analysis?”
- “What assumption, if wrong, would change your top recommendation?”
- “What data did you NOT have that would change this?”
- “Give me the contrarian view — why might this strategy fail?”

The Diverge → Converge Pattern

DIVERGE: Generate many options without limits. Aim for 10+ ideas. No self-censoring.

CONVERGE: Apply filters, rank by impact and feasibility, commit to top 3-5.

Files to Upload

Essential: Financial statements (3yr), prior strategic plans, business overview, KPI dashboard.
Performance: Reflections, org chart, sales pipeline. Strategic: Vision/mission/values, competitive intelligence, product roadmap, board materials.

Persona Shortcuts

- Strategic Advisor: “You are a seasoned CEO advisor with 20 years of Fortune 500 experience.”
- Skeptic: “Play devil’s advocate. Challenge every assumption in this plan.”
- CFO: “You are a CFO. Analyze this through a financial lens and flag risks.”
- Customer: “You are our ideal customer. React to this strategy from the buyer’s perspective.”



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