

AI STRATEGY LAB

STRATEGIC PLANNING

From Curiosity to Competitive Advantage

Make BIG Happen Summit 2026



Your Facilitators



Curt Gooden

Chief AI Officer

- 25+ years driving enterprise growth through technology innovation
- Former CTO and CIO across global companies (TaskUs, C3)
- AI Faculty, Vjal Institute



John Giegerich

Partner / Executive Coach

- Former bank president and senior executive (BB&T, BBVA Compass, SunTrust)
- Transformational leader coaching CEOs to extraordinary results
- Emory University, Goizueta Business School

Extraordinary Results, Quarter After Quarter

2,000+ CEOs and entrepreneurs coached across
100+ industries in 90 countries.

Results for clients engaged 2+ years:

22.8%

Average Revenue CAGR

Nearly 2X the U.S. average

37.5%

Average EBITDA CAGR

Nearly 3X the U.S. profit average

\$21B+

In Client Exits

86 client exits worth over \$21B

Session Agenda

1 The CEO's AI Reality Check

Why most AI initiatives stall, and how to bring your team along

2 The AI Landscape & Building Your Advisor

The reasoning revolution, 2026's AI platforms, and building your AI Strategic Advisor

3 From Deep Research to Professional Deliverables

Deep research, professional deliverables, and the prompt library in action

4 Your 3 Actions

What every CEO should do before next Friday

5 Q & A

THE CEO'S AI REALITY CHECK

Why most AI initiatives stall, and what separates high performers

AI Is Widespread. Scaled Value Is Still Rare.

The bottleneck isn't adoption. It's workflow redesign a



88%

Use AI in at least
one business function

33%

Have begun scaling
AI across the enterprise



6%

Are AI high performers
with significant EBITDA impact

39% report any enterprise-level EBITDA impact, and most of those say less than 5% of EBITDA is attributable to AI.

What Separates AI High Performers

01

CEO-Led Strategy

High performers are 3X more likely to have strong senior-leader ownership of AI strategy. Ground-up experiments don't transform.

02

Workflow Redesign

Workflow redesign is a key driver of EBITDA impact from AI. Technology delivers about 20% of value; the other 80% is operating model.

03

Scale, Don't Experiment

23% of organizations are scaling agentic AI; another 39% are experimenting. The gap is moving from isolated pilots to enterprise adoption.

AI strategy is operating-model strategy. The CEOs winning treat AI as a way to redesign how work gets done.

Overcoming AI Hesitancy in Your Team

01

Start With One Workflow

Pick one high-value, repeatable process. Let your team see AI save them hours, not threaten their role. Early wins build momentum.

02

Designate an AI Champion

Appoint someone curious and credible to lead adoption. They bridge the gap between the tool and the team: running demos, sharing wins, and fielding questions.

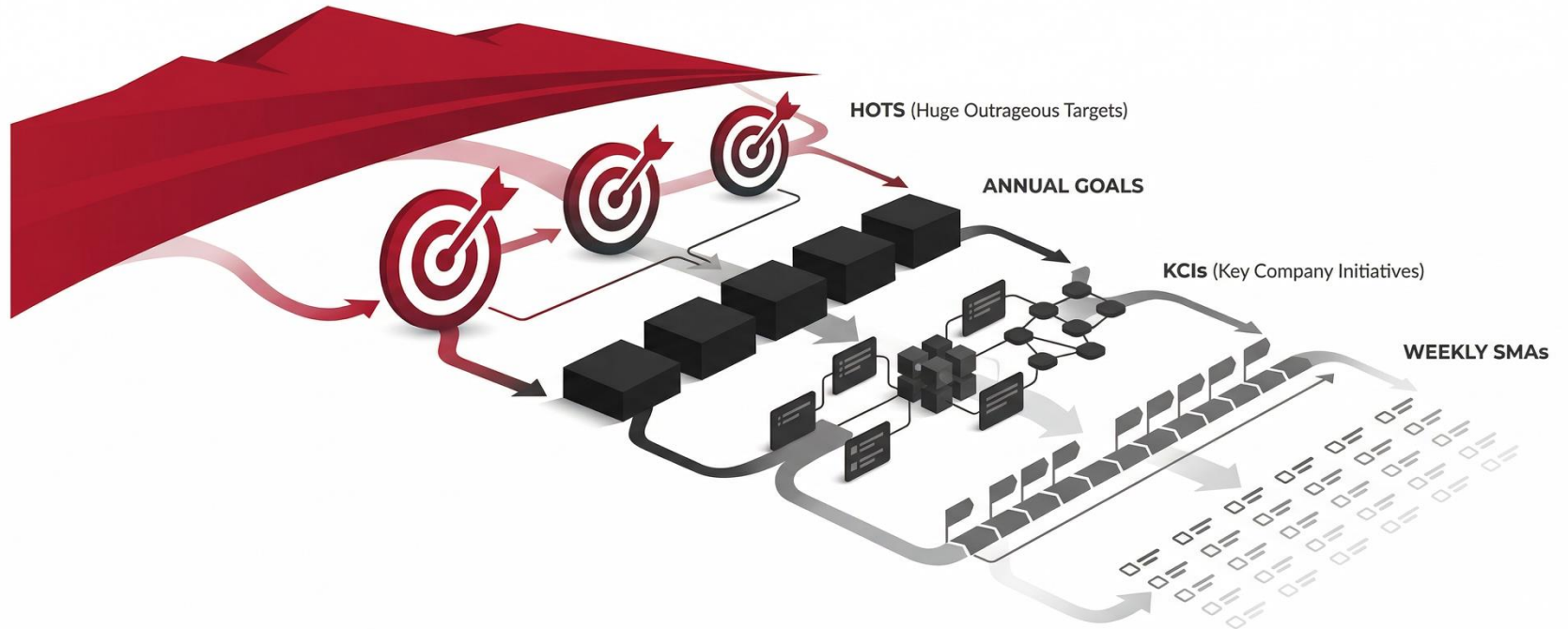
03

Create Safe-to-Fail Experiments

Give people permission to try AI without pressure to be perfect. Low-stakes experiments reduce fear and build fluency faster than mandates.

Your team will adopt what they trust. The CEO sets the tone. Show them AI is a tool that amplifies their expertise, not a replacement.

Make BIG Happen — Cascading the Vision



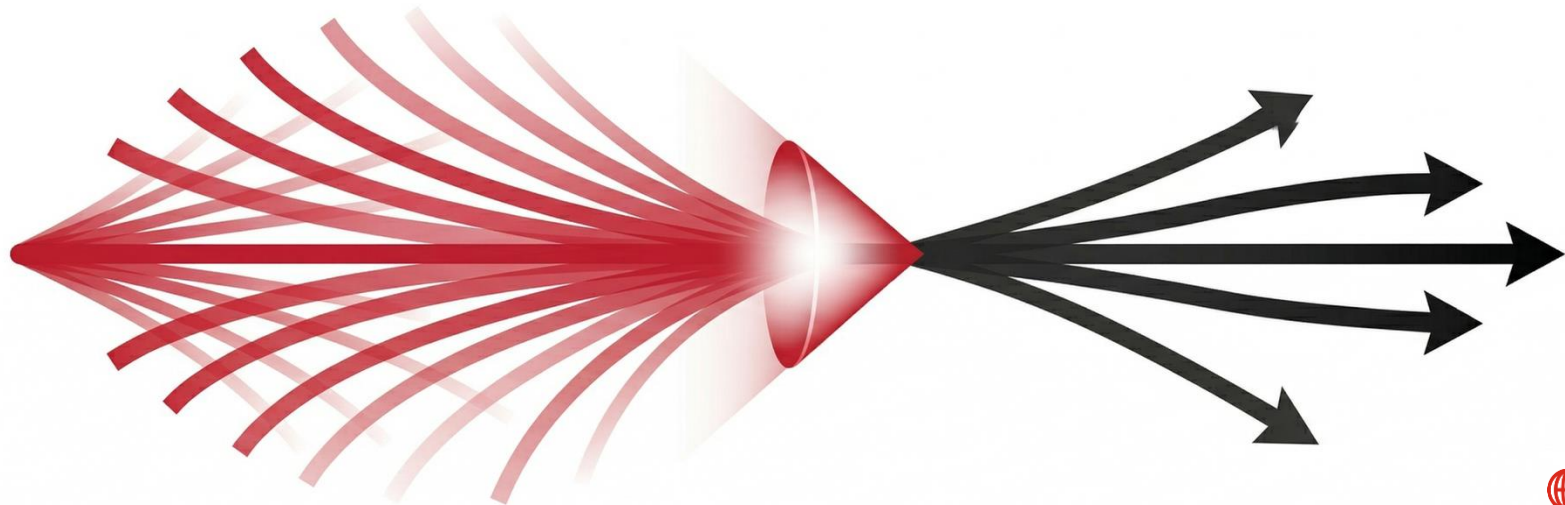
Divergent Thinking to Convergent Priorities

DIVERGE

Generate many options
Brainstorm without limits
Explore every possibility

CONVERGE

Narrow to the best
Apply rigorous filters
Commit to top 3-5 priorities



Common Planning Challenges

Limited Data Depth

Teams arrive at planning sessions without enough analysis to make informed decisions

Too Much Debate

Hours spent refining existing data instead of exploring new opportunities

No Scenario Thinking

Not enough time to model alternative futures and stress-test assumptions

Idea Drought

Need for fresh perspectives and non-obvious growth levers that break groupthink

AI SOLVES THESE

AI becomes the smartest analyst in the room, surfacing insights, challenging assumptions, and modeling scenarios at the speed of conversation.

THE AI LANDSCAPE & BUILDING YOUR ADVISOR

The reasoning revolution, 2026's AI platforms, and building your advisor

AI Maturity Model

5

AUTONOMOUS

Self-optimizing AI ecosystems securing market leadership

4

TRANSFORMATIONAL

AI-first business models driving new revenue streams

3

STRATEGIC

Cross-functional AI creating competitive advantage

2

FUNCTIONAL

Department-level AI delivering measurable ROI

1

EXPERIMENTAL

Isolated AI projects with promising but limited results

Where is your company today? Where do you need to be in 12 months?

The 4-Part Prompt Framework

The text you type is called a prompt. Quality in, quality out.

1 Goal + Context State the outcome you need. Reference your uploaded documents explicitly.

2 Assign a Persona “You are a seasoned CEO advisor...” or “Play a skeptical board member...”

3 Specify Format Request the structure: executive briefing, ranked table, revenue bridge, etc.

4 Iterate & Challenge First response is a draft. Follow up: “Go deeper on #3.” “What are you uncertain about?”

Generic: “Write me a growth strategy.” Strategic: “You are a seasoned CEO advisor to our \$50M distribution business. Give me 3 growth paths to \$75M as a one-page memo with risk and EBITDA.”

The Reasoning Revolution

Conversational Models

Fast & General-Purpose

ChatGPT Instant, Gemini 3.1 Fast, Claude Haiku 4.5

Generate responses in seconds

Optimized for speed and flow

Great for brainstorming and drafts

Best for: Quick queries, iteration, daily use

Reasoning Models

Deep & Deliberate

GPT-5.5 Thinking / Pro, Claude Opus 4.7, Gemini 3 Thinking / Pro

Deliberate before answering

Apply more deliberate reasoning

Explore multiple solution paths

Best for: Strategy, analysis, complex planning

For strategic planning, use reasoning mode. Every major model now offers it.

The AI Landscape: April 2026

Which tool for which job?

Strategy synthesis & long-form writing

Claude - Anthropic

Opus 4.7

Top-tier reasoning, nuanced writing, Cowork for professional deliverables

Deep research & autonomous browsing

ChatGPT - OpenAI

GPT-5.5 Thinking

Deep Research across hundreds of sources with citations. Computer use for web tasks.

Multimodal & Google Workspace integration

Gemini - Google

3.1 Pro

Native multimodal, 2B Chrome users, strong benchmark results

Real-time data & multi-agent workflows

Grok - xAI

4.20

Real-time X/news access, 2M context, native multi-agent mode available

AI Governance: What Every CEO Must Address

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, SSNs, credit card numbers, or attorney-client privileged documents. Anonymize sensitive customer data. Check your platform's data policy.

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.



Create Your AI Strategic Advisor

- 1 Open your favorite LLM (Claude, ChatGPT, Gemini, etc.)
- 2 Create a new Project or workspace
- 3 Name it "<Name> - AI Strategic Advisor"
- 4 Add Project Instructions (*from your Prompt Library*)
- 5 Upload your key business documents 
- 6 Start your first conversation

KEY FILES TO UPLOAD

Most LLMs support project workspaces where you can upload documents and maintain context across conversations.

Essential

Financial Statements (3-year)
Prior Strategic Plans
Business Overview / Pitch Deck

Performance

KPI Dashboards
Reflection Documents
Org Chart

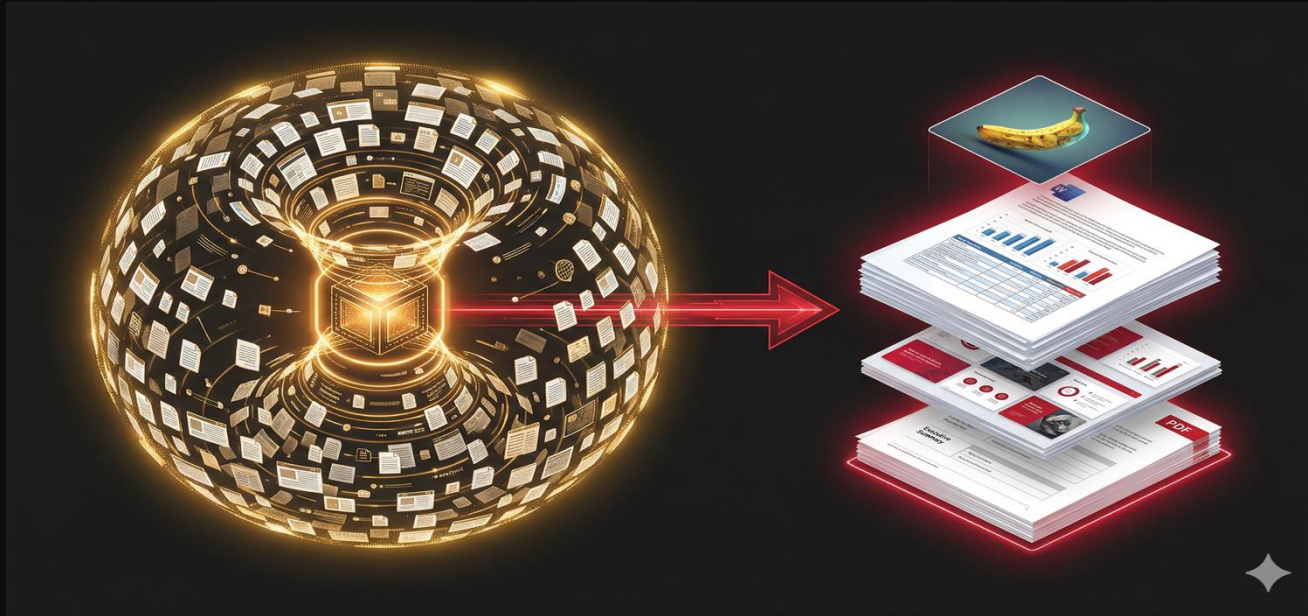
Strategic

Vision, Mission, Values
Competitive Intelligence
Product Roadmap

FROM RESEARCH TO PROFESSIONAL DELIVERABLES

Deep research, competitive intelligence, and the prompt library in action

From Research to Professional Deliverable



DEEP RESEARCH

ChatGPT Deep Research | Claude Research

PROFESSIONAL DELIVERABLE

Claude Cowork: Word docs, decks, PDFs, branded output

Power Move: Use each AI for what it does best. Research in ChatGPT, polish in Claude Cowork.

Deep Research: AI That Works For You

AI that autonomously researches complex, multi-step questions.

Available in ChatGPT across plans with varying limits, and in Claude paid plans.

- Autonomously searches dozens of sources
- Synthesizes findings into comprehensive reports
- Provides citations and source links so you can verify findings
- Runs 5-35 minutes depending on complexity
- Produces research-grade output

BEST USE CASES

- Competitive landscape analysis
- Market sizing and trends
- Industry best practices review
- Due diligence on partners
- Regulatory environment scanning
- Customer/market segmentation



Traditional Research Brief
3 pages



AI Deep Research Output
30+ pages



The Insight That Changes Minds

TRADITIONAL APPROACH

Weeks

Analyst team or consulting engagement

Calendar time | Coordination overhead | Generic frameworks

VS

AI-POWERED

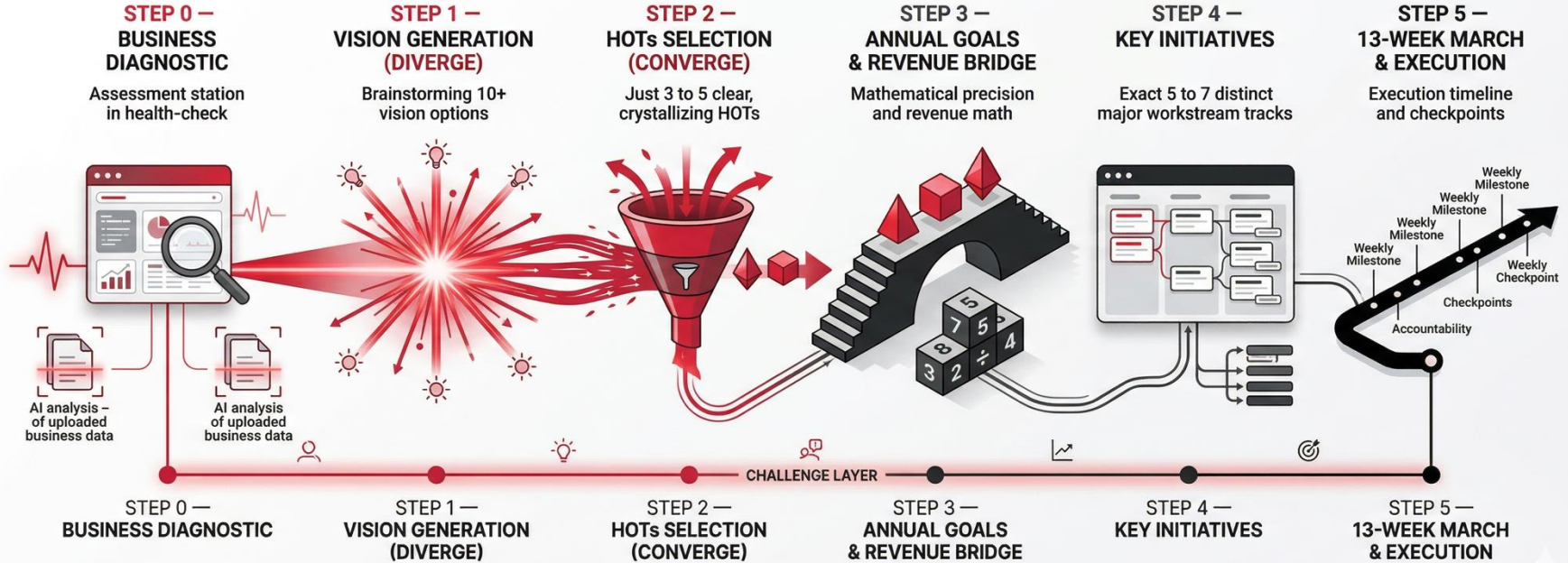
Minutes

Strong first-pass analyst brief

Real-time | Your data | Iterate with your team

This doesn't replace your coach or advisors. It means you show up to planning with analysis already done, then iterate with your leadership team.

The MBH AI Planning Sequence



Your Prompt Library

Your executive toolkit: strategic prompts that turn any AI into a CEO-grade advisor for planning, analysis, and decision-making

Planning Framework Prompts (P0-P5)

Business Diagnostic | Diverge 10+ Options | Converge to HOTs | Revenue Bridge | Annual Goals | Initiatives & Execution

Deep Analysis Prompts

Competitive Intelligence | Market Sizing | Customer Segmentation | Weakness Analysis | Scenario Planning

Challenge the AI's Reasoning

What are you uncertain about? | Stress-test this assumption | What data would change this? | Contrarian view



Step 0 in Action: Your Business Under the Microscope

Claude analyzed 8 uploaded documents and produced a 12-page executive diagnostic — grounded in Nvidia's actual data.

5 DIAGNOSTIC HEADLINES

- 1 Financial fortress confirmed** — \$215.9B revenue (+65% YoY); 2-yr CAGR 88%; \$62.6B cash.
- 2 Concentration risk is the #1 vulnerability** — Data Center = 91.4%; top 3 customers ≈ 40%.
- 3 Margin compression has begun** — Gross margin 75.0% → 73.4% (-150 bps); structural, not temporary.
- 4 China loss is permanent** — \$5.5B write-down; \$8–12B annual revenue forgone.
- 5 Moat is durable but eroding at the edges** — AI accelerator share fell 87% → 80%; CUDA still the differentiator.

Each finding: [DOCUMENTED] or [INFERENCE] + confidence rating

AI Strategic Adv... / Comprehensive business diagnostic and financial analy...
Nvidia business diagnostic april 2026 DOCK

Review all uploaded documents and provide a comprehensive business diagnostic. 1. Financial health: Calculate 3-year revenue CAGR, gross margins, EBITDA %, cash position and runway. Show formulas. Flag any metrics you cannot calculate due to missing data. 2. Business model performance: Key unit economics, customer metrics (CAC, LTV, churn if available), growth efficiency. Use ranges where data is incomplete. 3. Wins from the past 12 months: What worked and why. Cite specific documents and data points. 4. Misses and challenges: What underperformed and root causes. Summarize confirmed misses (data>Show more

Assembled comprehensive financial data across documents for analysis >
Now let me read the Excel financial statements for precise 3-year figures.

Synthesized financial data and compiled comprehensive diagnostic briefing >
Now I have all the data needed. Let me compile this comprehensive diagnostic.

Orchestrated comprehensive business diagnostic framework with rigorous documentation stand... >
Here's the full executive briefing grounded in all nine uploaded documents. The five headlines I'd bring to your next leadership meeting:

1. Financial fortress, strategic fragility. 88% 2-year revenue CAGR, \$62.6B cash, \$96.7B FCF, 0.06x Debt/EBITDA. No financial risk. But 91.4% of revenue from one segment and ~40% from three customers k... , structurally dangerous—and getting worse. not better

Reply...
Claude is AI and can make mistakes. Please double-check responses.

NVIDIA CORPORATION
Comprehensive Business Diagnostic

Executive Briefing | M&H Strategic Framework
April 2026

CONFIDENTIAL — FOR EXECUTIVE TEAM USE ONLY

Sources: NVIDIA 10-K FY2026, 10-Q Q42026 FY2026, 4P1 Downloaded 01/2026, Strategic Plan Summary 2025-2027, Business Overview 2026, Competitive Landscape 2026, Financial Statements FY2023-2025

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NVIDIA Business Diagnostic | April 2026

Executive Summary

Bottom line: NVIDIA delivered extraordinary FY2026 results—\$215.9B revenue (+65% YoY), \$120.1B net income, and \$102.7B operating cash flow—but the company now faces a strategic inflection point. Hypergrowth is decelerating, customer concentration is intensifying, and competitive threats are eroding its lead. The next 12-18 months will determine whether NVIDIA transitions successfully from a GPU supplier to an enduring AI platform company.

Claude writing the diagnostic in real time — executive briefing output on the right

Steps 1-2 in Action: The HOT Selection Matrix

12 bold targets scored on 5 dimensions. The MBH filter: "Will this change the game?"

TOP 5 HOT CANDIDATES — SCORED

22/25 10M CUDA Developers by FY2029 MUST DO

21/25 Gross Margins $\geq 70\%$ at Scale MUST DO

20/25 \$500B Total Revenue by FY2030 MUST DO

18/25 Sovereign AI — 30+ Countries derivative

18/25 \$25B Software / Services ARR derivative

MUST-DO $\geq 20/25$ · Derivatives deferred to FY2028

→ 3 non-negotiable HOTs that gate each other

HOT CANDIDATE	LEVERAGE	STRATEGIC FIT	ACHIEVABILITY	LEADERSHIP ENERGY	DOWNSIDE RISK (S = LOW)	TOTAL /25
5 10M CUDA Developers	5	5	4	4	4	22
5 Gross Margins $\geq 70\%$ at Scale	5	5	3	4	4	21
3 \$25B Software / Services ARR	5	4	2	4	3	18
1 \$500B Total Revenue	5	5	3	4	3	20
10 Sovereign AI — 30+ Countries	4	4	3	4	3	18
7 \$150B+ Free Cash Flow DERIVATIVE	4	4	3	3	4	18
2 Non-DC Revenue $> \$40B$ DERIVATIVE	4	4	2	3	3	16
4 Auto & Robotics → \$15B TOO EARLY	4	4	2	4	2	16
Customer Conc. $> 35\%$						

12 candidates → 3 non-negotiable HOTs (scored 1–5 across 5 dimensions)

A Winning HOT, Fully Formed

Every selected HOT gets a complete briefing: target, rationale, risks, milestones, confidence.

SELECTED HOTS — RANKED WITH DETAIL

RANK #1 — NON-NEGOTIABLE MUST DO Score: 22/25 3-Year HOT Confidence: Medium-High

10 Million CUDA Developers by FY2029

MEASURABLE TARGET

Grow CUDA developer ecosystem from 4M+ today to 10M+ registered, active developers by end of FY2029 (January 2029). Measured by monthly active CUDA toolkit users, certified developer count, and framework integration depth.

WHY THIS HOT OVER ALL OTHERS

CUDA is rated 9/10 vs. AMD ROCm at 5/10 in the competitive assessment. The Strategic Plan identifies CUDA as the "primary defense" against both AMD competition and hyperscaler in-sourcing. Every other HOT on this list — revenue, margins, software, sovereign AI — depends on CUDA remaining the default. If CUDA's moat erodes, nothing else matters. At 10M developers, CUDA becomes as structurally entrenched as Windows was in enterprise computing. This is the HOT that protects all the other HOTS.

EVIDENCE BASIS

[DOCUMENTED] Current base: 4M+ developers (KPI Dashboard). Strategic Plan targets 5M+ by 2028 and 95%+ satisfaction with <1% switching. CUDA represents \$300B+ in global customer software investment. Switching costs: 18–24 month migration timeline. Competitive Landscape confirms ROCm at ~500K developers — 8x behind. Historical CUDA growth: ~40% CAGR from ~2M (2022) to 4M+ (2025).

A BIGGEST RISK

Open-source abstraction layers (Triton, JAX/XLA) reduce CUDA's necessity without requiring a direct competitor to "win." Developers adopt framework-level abstractions that compile to multiple backends, making CUDA one option among many rather than the only option. This is a risk AMD cannot create but Google and the open-source community can.

12-MONTH MILESTONE

Reach 5.5M registered CUDA developers by April 2027. Launch CUDA University Certification program in 50+ countries. Ship CUDA 13 with features incompatible with ROCm/HIP translation layer — creating "CUDA-only" capabilities in at least 3 major ML frameworks.

CONFIDENCE: MEDIUM-HIGH — WHAT WOULD RAISE IT TO HIGH

Need: (1) Quarterly developer growth metrics for last 8 quarters to validate the 40% CAGR assumption. (2) Churn data — how many CUDA developers are inactive or have migrated to framework-level abstractions. (3) Competitive intelligence on Triton adoption rates at Google, Meta, and OpenAI. If CUDA's active developer growth is still 35%+ and Triton adoption is <10% of ML workloads, confidence moves to High.

RANK #2 — NON-NEGOTIABLE MUST DO Score: 21/25 5-Year HOT Confidence: Medium

HOT #1 — 10 Million CUDA Developers by FY2029

Measurable target · Why this HOT · Biggest risk · 12-month milestone · Confidence rating

Step 3 in Action: Engineering the Revenue Bridge

From HOT to annual goals: AI reverse-engineers the specific math showing how you close the gap.

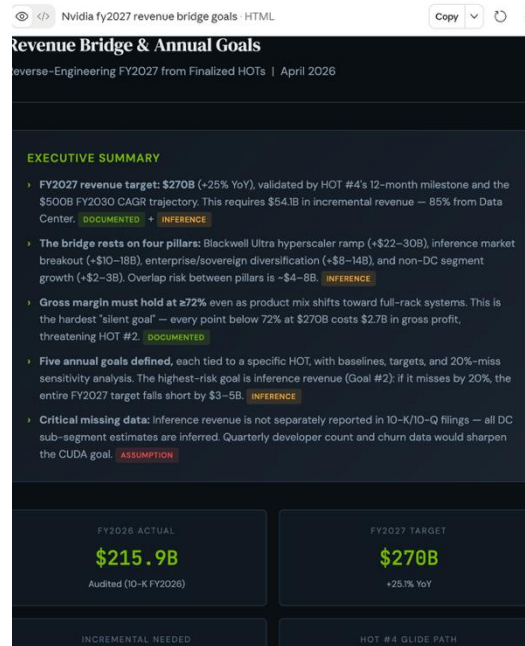
FY2027 BRIDGE — 4 PILLARS

\$215.9B → \$270B

+\$54.1B incremental · +25% YoY · gated by \$500B Revenue HOT

- +\$22–30B** Blackwell Ultra hyperscaler ramp
- +\$10–18B** Inference market breakout (new segment)
- +\$8–14B** Enterprise + sovereign diversification
- +\$2–3B** Non-DC segment growth (Gaming, Auto, Prof Viz)
- \$4–8B** *Overlap adjustment (risk)*

+ 5 annual goals, each tied to a specific HOT



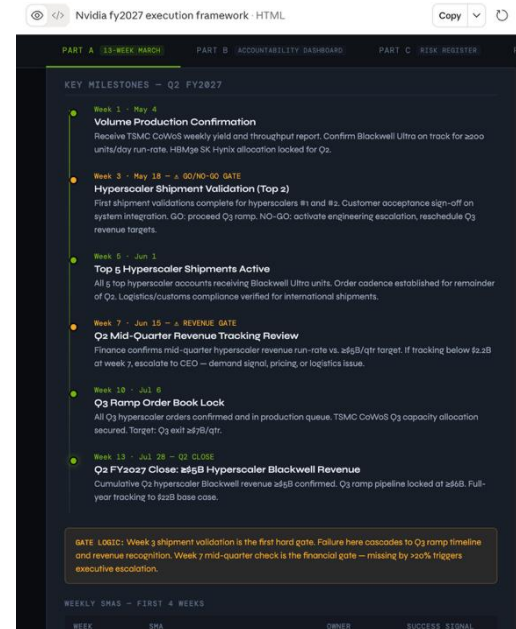
Revenue bridge deliverable with confidence ratings and sensitivity analysis

Steps 4-5 in Action: From 25 Ideas to Week-by-Week Execution

Brainstorm 25 initiatives → force-rank to 7 → dated milestones, owners, and decision gates.



STEP 4: Effort vs. Impact — 7 commit, 2 quick wins, 15 defer



STEP 5: 13-week march with dated milestones, GO/NO-GO gates, SMA cadence

90 Minutes. Board-Ready Strategy.

What you just saw: the complete Nvidia planning output — compressed from weeks into one session.

STEP 0

12-PAGE

Executive Business Diagnostic

Uploaded docs → one C-level brief

STEPS 1-2

12 → 3

Top HOTs Scored & Chosen

Divergent + MBH filter = focus

STEP 3

\$215.9B → \$270B

Revenue Bridge, 4 Pillars

Every dollar tied to a HOT

STEP 4

25 → 7

Initiatives Ranked

Effort × Impact → Commit, Quick Win, Defer

STEP 5

13-WEEK

Week-by-Week Execution

GO/NO-GO gates, owners, cadence

TOTAL

~90 MIN

End-to-End, Live

Traditional prep: 6-8 weeks

THE PRODUCTIVITY SHIFT: **Traditional planning prep 6-8 weeks → AI-assisted ~90 min live**

Don't Just Accept the AI's Answer

Challenge the AI's Output

"What are you most uncertain about in this analysis?"

Forces the AI to flag its own weak spots

"What assumption, if wrong, would change your top recommendation?"

Stress-tests the foundation of the advice

"What data did you NOT have that would change this?"

Reveals blind spots in the input

"Give me the contrarian view: why might this strategy fail?"

Devil's advocate on demand

The AI accelerates your thinking. YOU make the final strategic decisions.

WHAT CHANGES TOMORROW

Your take-home value: an AI strategic advisor ready to help you plan

Your 3 Actions This Week

1

Set Up Your AI Strategic Advisor

Use the Prompt Library to create your project, add project instructions, upload your company documents. Takes 30 minutes.

TODAY

2

Run the Business Diagnostic

Run Prompt 0 on your own company. Read the output. See what the AI surfaces that you hadn't considered. Takes 30 minutes.

TOMORROW

3

Start Building Your Strategic Plan

Use the prompt library to start creating your strategic plan. Run the first few prompts and experience AI as your strategic advisor.

NEXT WEEK

AI + Coaching = UNSTOPPABLE!

“AI gives you the theoretical best answer.

A coach gives you the answer that works in your company, this quarter.”



AI will give you a first answer. A coach is the person in your corner pushing you to round 3, round 5, round 10. That is where the real answer lives.

The formula: AI + Coach. Not one or the other.

Your AI Strategic Planning Toolkit

INCLUDES

- Project instructions
- File upload guide
- 20+ strategic prompts
- Diverge/Converge pairs
- Challenge prompts
- MBH planning sequence



<https://l.ead.me/bgkUZd>

WORKS WITH

- Claude
- ChatGPT
- Gemini
- Any reasoning model

Scan to download your complete
AI Strategic Planning Guide & Prompt Library

Q & A

Your Questions, Real Answers



Make BIG Happen with AI

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"Coaching CEOs and Entrepreneurs to Extraordinary Results"