The Operator's Brief — One-Page Memo for the CFO/COO

A pre-formatted memo your internal champion can email or print to make the case for a 5-25 seat team purchase. Updated for operatorsbrief.co.

TO: [CFO or COO]

FROM: [Champion]

RE: Proposal — 5-seat, 6-week pilot of The Operator's Brief (AI-for-managers training)

Headline

> **Our managers are using AI. They're not using it well. A 6-week, $1,562.50 pilot tells us whether structured training closes that gap before our competitors close it on us.**

The opportunity cost of doing nothing

73% of knowledge workers use AI at least weekly, but only 29% rate themselves as advanced (Wharton AI Adoption Report 2025). Organizations with formal AI training programs hit 2.7× higher proficiency scores and 4.1× higher user satisfaction than self-taught peers. In professional services specifically, 30-60% of billable hours go to repeatable tasks AI can compress by 50-90%, and AI-using lawyers are reclaiming up to 25% of admin time as billable capacity (American Bar Association, Clio 2025).

The cost of "we'll figure it out informally" is not zero. It's a quarter where competitors' managers got 6 weeks better at this and ours didn't.

The economic case (with explicit, conservative assumptions)

Input	Assumption	Source / rationale
Seats in pilot	5 managers	Smallest statistically meaningful cohort
Price per seat	$312.50 (paid pilot)	6-week access; credited toward annual Team or Portfolio if you convert
Total pilot cost	**$1,562.50**	One-time
Realistic completion rate	50%	

		Paid + cohort + manager-reported; floor of the 35-50% band
Realized weekly time savings (completers)	1.5 hours/week	Discounted from self-reported 40-60 minutes/day; survives Parkinson's Law skepticism
Marginal value of reclaimed hour	$50	Not fully-loaded $87/hour — marginal opportunity cost for a salaried manager
Annualized capacity returned (completers only)	2.5 completers × 1.5 hours × 48 weeks × $50 = **$9,000**	See "what we're really buying" below

Cash payback is not the real argument. Salaried managers don't return saved hours as cash — Parkinson's Law absorbs them. The defensible outcome metrics are:

1. **Completion rate** — target e50% finish all 8 modules in 6 weeks, vs 12-15% LinkedIn Learning baseline.
2. **Weeks-active in the Playbook** — target e3 of 6 weeks logged use. The Playbook is the post-course retention surface; if it's not opened, the training didn't take.
3. **Documented workflow change** — each completer ships e2 AI-augmented workflows by name. Examples: a deal-memo template, a client-brief drafter, a Request For Proposal scorer.
4. **Capacity returned to higher-value work** — the 1.5 hours per week redirected to client-facing or revenue work, validated qualitatively in the manager's 1:1.

What we're buying is named workflows owned by named managers, not a vague productivity uplift.

Why this vs. the alternatives we already have

Option	Why it doesn't replace this
LinkedIn Learning	Generic individual-contributor catalog. ~12-15% completion at our seat count. No role-specific manager curriculum. No Playbook artifact. Good for breadth, not for behavior change.
Microsoft Copilot Adoption Center	Tool-specific (Microsoft 365 surface only). Microsoft's own research flags "absence of internal AI champions who can demonstrate workflows to non-technical employees" as the #1 adoption blocker. This program produces those champions.
Free YouTube / prompt libraries	Zero accountability. Zero completion data. Zero manager reporting. Self-guided learners hit 2.7× lower proficiency than program-trained peers. We've tried this for 18 months.

Pilot proposal — 5 seats × 6 weeks × $1,562.50

Gates to expand to a 25-seat rollout:

- e3 of 5 pilots complete the curriculum (60% completion)
- e2 documented workflows per completer, in production

- Manager-reported time reclaimed e1 hour/week by week 8
- At least one workflow adopted by a non-pilot teammate (organic spread)

If gates miss, we stop. $1,562.50 lost. No multi-year commit.

Risk mitigation

- **Guarantee:** The Operator's Brief offers a 14-day money-back guarantee. Worst-case downside on a non-starter: ~$0.
- **Scope creep:** Fixed cohort, fixed end date, fixed measurement plan. I own the readout.
- **Opportunity cost of my time:** I'll spend ~2 hours/week on this for 6 weeks (~12 hours total) running cohort sync and gate measurement. Already budgeted in my operations time.

Ask

> **Approve $1,562.50 + 12 hours of my time. Go/no-go memo on your desk in 50 days.**
>
> *— [Champion]*

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The Operator's Brief is a paid course teaching managers and operators (not engineers) to use Claude (Anthropic's AI) and AI broadly in their daily work. Owned by Setlist Capital.