



Your AI Advantage

Operating at an Executive Level, Faster

AI doesn't just make tasks easier — it enables you to **think, communicate, and deliver** at the level expected in boardrooms and C-suites.

THE CORE SHIFT

AI Makes Your Expertise Visible, Scalable, and Impossible to Ignore

"The executives who thrive tomorrow are the ones who learn to think with AI today."

Think

Explore strategic options with a second brain that never sleeps

Communicate

Deliver polished, executive-ready narratives in minutes

Deliver

Act on data quickly with insights that drive decisions

The Top 3 Agentic AI Tools for Executives

Know your tools — and how to use them at the highest level.



ChatGPT (OpenAI — GPT-5.4)

Best for: Board presentations, executive writing, strategic brainstorming, and rapid content generation

Agentic strength: Multi-step task execution, web browsing, code interpreter, and file analysis. Leads in agentic search and multilingual Q&A.

Tip: "Use GPT-5.4 for polished narratives, executive summaries, and complex document drafting."



Claude (Anthropic — Claude Opus 4.7)

Best for: Long-form analysis, nuanced reasoning, multi-agent workflows, and financial analysis

Agentic strength: #1 on agentic reasoning benchmarks (SWE-bench Pro: 64.3%), multi-agent coordination for hours-long workflows, 14% improvement in multi-step agentic reasoning with fewer errors.

Tip: "Use Claude for deep analysis, sensitive documents, and complex multi-step workflows."



Gemini (Google — Gemini 3.1 Pro)

Best for: Google Workspace integration, multimodal tasks (text, image, video, audio), and enterprise data workflows

Agentic strength: Best-in-class agentic coding, simultaneous multi-step tasks, connects to Google Workspace, Salesforce, SAP, and BigQuery. Powers Gemini Enterprise for no-code agent building.

Tip: "Use Gemini when you're deep in Google's ecosystem or need multimodal intelligence."

❏ Each tool has a unique edge — the smartest executives use all three strategically.

Two More Power Tools Every Executive Should Know

Beyond the big three — these specialized tools unlock a new level of productivity.

NOTEBOOKLM

What it is:

Google's AI-powered research and knowledge assistant. Upload your own documents, reports, PDFs, and data — and it becomes an expert on YOUR content.

Best for executives:

- Summarizing lengthy reports, contracts, or research in seconds
- Asking questions directly against your own documents (no hallucinations from outside data)
- Generating audio overviews (podcast-style summaries) of complex materials
- Building a private knowledge base from internal documents

Sample prompt:

"Summarize the key risks in this 40-page contract and flag any clauses that need legal review."

Power line: "It doesn't just know AI — it knows YOUR business."

Gamma

What it is:

AI-powered presentation and document builder. Turn ideas, outlines, or raw content into polished, board-ready presentations in minutes — no design skills required.

Best for executives:

- Creating executive presentations, one-pagers, and reports instantly
- Transforming bullet points or notes into visual, professional decks
- Collaborating and sharing interactive documents with teams
- Replacing hours of PowerPoint formatting with AI-generated design

Sample prompt:

"Create a board-level presentation on our Q1 revenue cycle performance with key risks and strategic recommendations."

Power line: "Stop building slides. Start delivering narratives."

 The best executives don't just use AI — they build a personal toolkit of the right AI for the right job.

EXAMPLE 2

Complex Excel & Data Analysis — Instantly

Before AI

- Manual formulas
- Time-consuming analysis
- Delayed insights

With AI — Sample Prompt

"Analyze this dataset and identify trends, risks, and opportunities. Create formulas and a summary dashboard."

Output

- Pre-built formulas
- Trend analysis
- Executive-ready summary



i You don't need to be a data analyst — you need to be someone who can **interpret and act on data quickly**.

EXAMPLE 2 — LIVE DASHBOARD

Procedure Category Progress Dashboard

Procedure Category Progress Dashboard						
As of Date	4/19/2026	Current Month	April 2026	Progress %	63.3%	
Total Avg Goal		Current MTD	Projected Month-End	Status		
23,801,021		14769253	23,319,873	On Track		
Procedure Category	Avg Goal	Current MTD	Projected	Variance vs Goal	Status	
Allergy Shots	1,924,448	2,039,166	3,219,736	1,295,288	Meet/Exceed	
Aluna RPM	61,046	420	663	(60,382)	Way Off	
Biologics - Admin	424,489	366,149	578,130	153,641	Meet/Exceed	
Biologics - Drug	8,614,174	5,320,684	8,401,080	(213,094)	On Track	
CMAT	11,030	8,700	13,737	2,707	Meet/Exceed	
Follow-up Patient	2,741,047	1,548,566	2,445,104	(295,943)	On Track	
Miscellaneous	3,423	1,941	3,065	(358)	On Track	
New Patient	1,565,222	1,037,628	1,638,360	73,138	Meet/Exceed	
No Show	13,469	2,200	3,474	(9,996)	Way Off	
Other visit/Procedure	344,321	143,554	226,664	(117,656)	Way Off	
PFT Machine	322,442	146,199	230,841	(91,601)	Way Off	
Rush	78,386	28,810	45,489	(32,896)	Way Off	
Serum	3,830,569	1,969,555	3,109,824	(720,745)	On Track	
SLIT	8,501	3,000	4,737	(3,764)	Way Off	
Spirometry	383,259	289,592	457,251	73,991	Meet/Exceed	
Testing Procedures	3,475,197	1,863,089	2,941,719	(533,477)	On Track	
Total	23,801,021	14,769,253	23,319,873	(481,148)	On Track	
Instructions						
1. Enter month-to-date numbers on Input_MTD in yellow cells only.						
2. Control!R2 defaults to TODAY() but can be overwritten						
> ≡ Dashboard Sheet1 Control Historical_Data Input_MTD Progress_2026 Notes ScreenShots						

AI turns raw data into a story

Take spreadsheet rows, numbers, and status updates — and instantly transform them into visual, executive-ready dashboards that are easy to track, interpret, and share.

- See trends, status, and performance at a glance
- Share clear insights with your team or leadership
- Skip manual formatting and repetitive dashboard building
- What used to take hours of pivot tables is done in minutes

EXAMPLE 1 DEEP DIVE

From Hours of Work to Executive-Ready Narrative

Before AI

- Hours (or days) building slides
- Struggling to frame the narrative for executives
- Data-heavy, story-light presentations

With AI — Sample Prompt

"Create a board-level presentation summarizing revenue cycle performance, key risks, and strategic recommendations for the next quarter."

Output

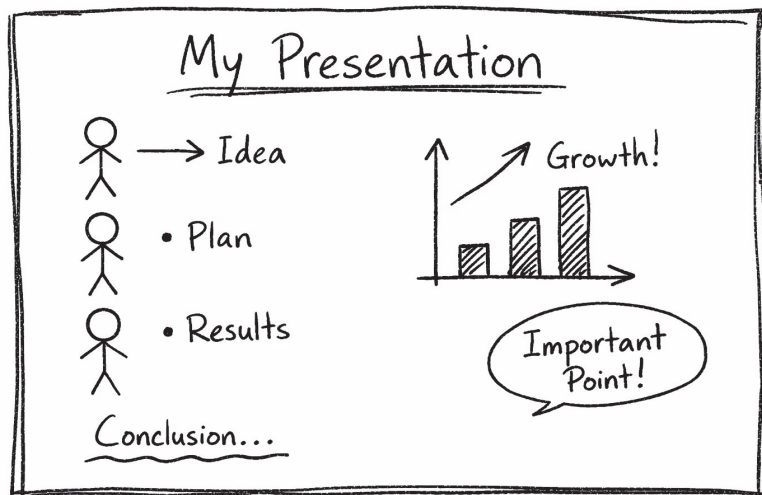
- Executive summary
- Clear storyline: Problem → Impact → Recommendation
- Polished talking points for each slide

EXAMPLE 1

Board-Level Presentations in Minutes

You're not just building slides — you're delivering a narrative CEOs expect.

BEFORE AI



Forgettable.

WITH AI

REVENUE CYCLE PERFORMANCE

Sustainable Energy Insights

Executive Summary

Energy Collection Rate
Next Quarter

94.2%

Carbon Collection Rate
2d 16,028

\$4.8M
Net Revenue

10% Optimization

12%
Deniol. Reduction



Clear. Compelling. Board-ready.

EXAMPLE 3

High-Stakes Career Moves

Raises, promotions, and new roles — powered by data and confidence.



EXAMPLE 3 DEEP DIVE

Know Your Value and Prove It

Before AI

Guessing your market value, uncomfortable negotiation conversations, and generic resumes that don't position you for the next level.

With AI — Sample Prompts

"Analyze salary benchmarks for a Director of Revenue Cycle in my region with 20 years experience."

"Write a compelling case for a salary increase based on these accomplishments."

"Rewrite my resume to position me for executive-level roles."

Output

- Market-backed salary range
- Confident, data-driven negotiation language
- Executive-level resume positioning

This isn't just about asking for more — it's about **knowing your value and proving it.**

EXAMPLE 4

Your Strategic Thinking Partner

Before AI

- Thinking through problems alone
- Limited time to explore options

With AI — Sample Prompt

"Act as a healthcare CFO. Evaluate this operational challenge and provide 3 strategic options with risks and benefits."

Output

- Multiple perspectives
- Risk/benefit analysis
- Structured decision support

Power Line

"You now have a second brain that helps you **think like the room you're trying to get into.**"

Prompting AI Like an Executive

The way you ask is the way you receive — here are four prompting strategies that get results.



Be Specific, Not Vague

The more context you give, the better the output. Include your role, the audience, the goal, and the format you need.

"As a Director of Revenue Cycle, write a 3-slide executive summary for our CFO on Q1 denial trends and recommended actions."



Verify Data Before You Trust It

AI can hallucinate numbers. Always cross-reference financial figures, benchmarks, and statistics against your source data before presenting.

"Using only the data I've provided below, summarize key trends. Do not add external statistics."



Build Complex Excel Documents Step by Step

Break large Excel requests into phases — structure first, then formulas, then formatting. This gives you more control and better results.

"Build an Excel tracker for AR aging by payer. Start with the column structure and data validation rules, then I'll ask for the formulas."



Iterate and Refine

Your first prompt is a starting point, not the final answer. Use follow-up prompts to sharpen tone, add detail, or restructure the output.

"Make this more concise and reframe it for a board audience. Remove jargon and lead with the business impact."

Four Ways AI Elevates Your Executive Presence



Board Presentations

Transform data into compelling executive narratives in minutes



Data Analysis

Interpret trends and act on insights without being a data analyst



Career Moves

Negotiate with market-backed data and executive-level positioning



Strategic Thinking

Explore options and stress-test decisions with a tireless thought partner

Your Expertise, Amplified

"AI doesn't make you smarter — it makes your expertise **visible, scalable, and impossible to ignore.**"

Visible

Communicate at the level the boardroom expects

Scalable

Deliver more, faster, without sacrificing quality

Undeniable

Back every move with data, strategy, and confidence

