



Mission: 1 Million Gen Xers Using AI

Docs and Decks Pack

Document Prompts

How to use ROICF

- **ROLE:** who you are and who you're writing for
- **OBJECTIVE:** the one thing you need produced
- **INPUTS:** links, docs, numbers, constraints you already know
- **CONTEXT:** background, stakeholders, policies, timing
- **FORMAT:** structure, length, sections, tables

Tip: ask for clarifying questions first when inputs are missing.

Universal ROICF Prompt

ROLE: I am a [job/role]. Write for this audience: [stakeholders].

OBJECTIVE: Produce a [deliverable] that helps me [goal]. Deadline: [date/time].

INPUTS: Use only these materials: [links/docs/data]. Assume unknowns are [list].

CONTEXT: Background [short], constraints [policy/legal/tone], stakeholders [names/teams].

FORMAT: Return sections: 1) Summary (3–5 bullets) 2) Key details (bold owners/dates/amounts) 3) Risks/Assumptions 4) Sources 5) Next steps (table: step, owner, date).

One-Pager Builder (ROICF)

ROLE: [Your role].

OBJECTIVE: Turn the attached document(s) into a one-page executive summary for [audience].

INPUTS: [link1], [link2], [doc path]. If data is missing, ask up to 3 clarifying questions.

CONTEXT: The decision needed is [X] by [date]. Policies/constraints: [list].

FORMAT: Title • Outcome/Ask • 3–5 bullets • Next steps table (Step | Owner | Date) • Sources • Assumptions.

10-Slide Outline Builder (ROICF)

ROLE: [Your role].

OBJECTIVE: Create a 10-slide outline I can paste into PowerPoint.

INPUTS: Topic [topic], audience [exec/team], sources [docs/links].

CONTEXT: Decision needed, timeline, and any constraints [list].

FORMAT: Slides 1–10: [Title] + [3 bullets]. Add a final 'Next steps/Ask' slide.



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One-Page Executive Summary Template

ROICF • 150–250 words • 3–5 bullets • Next steps table

Header

Title	[Project / Topic]
Owner	[Name, Role]
Date	[MM/DD/YYYY]

Outcome / Ask

[One sentence. State decision or outcome requested.]

Key Points (3–5 bullets)

- [Point 1]
- [Point 2]
- [Point 3]
- [Point 4]
- [Point 5]

Next Steps

Step	Owner	Date
[Define step]	[Name]	[MM/DD]

Risks / Assumptions

- [Risk/Assumption 1]
- [Risk/Assumption 2]

Sources

- [Link or doc path]
- [Link or doc path]



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Paste-Ready ROICF Block

ROLE: [your role]; OBJECTIVE: compress to a one-pager for [audience].

INPUTS: [links/docs].

CONTEXT: [background], constraints [policy/tone/legal], decision needed by [date/time].

FORMAT: use the section headings above exactly; 150–250 words; bullets where helpful; include Next Steps table; cite sources.



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10-Slide Outline Template

ROICF • Titles + 3 bullets each • Exec-ready

Slides 1–10

1. Title / Hook

- [Bullet 1]
- [Bullet 2]
- [Bullet 3]

2. Problem / Goal

- [Bullet 1]
- [Bullet 2]
- [Bullet 3]

3. Context / Inputs

- [Bullet 1]
- [Bullet 2]
- [Bullet 3]

4. Key Insight #1

- [Bullet 1]
- [Bullet 2]
- [Bullet 3]

5. Key Insight #2

- [Bullet 1]
- [Bullet 2]
- [Bullet 3]

6. Recommendation

- [Bullet 1]
- [Bullet 2]
- [Bullet 3]

7. Plan / Workstreams

- [Bullet 1]



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- [Bullet 2]
- [Bullet 3]

8. Timeline / Milestones

- [Bullet 1]
- [Bullet 2]
- [Bullet 3]

9. Risks & Mitigations

- [Bullet 1]
- [Bullet 2]
- [Bullet 3]

10. Metrics / ROI / Ask

- [Bullet 1]
- [Bullet 2]
- [Bullet 3]

Paste-Ready ROICF Block

ROLE: [your role]. OBJECTIVE: generate a 10-slide outline for [audience].

INPUTS: Topic [topic], sources [links/docs], any required data points [list].

CONTEXT: Decision/timeline/constraints [list].

FORMAT: Slide titles + 3 concise bullets (<14 words). End with 'Next steps/Owner/Date' if needed.



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One-Page Executive Summary (Filled Examples)

Sales • Operations • Product

Example 1 — Sales: Q4 Pipeline Health One-Pager

Header

Title	Q4 Pipeline Health — Mid-Nov Update
Owner	VP Sales
Date	11/10/2025

Outcome / Ask

Decision: Approve two short-term SPIFs to close \$1.2M at risk.

Key Points (3–5 bullets)

- Current commit: \$6.8M vs target \$7.5M; gap \$0.7M.
- Slip risk: \$1.2M across 7 deals due to legal review and security checks.
- Win rate last 30 days: 29 percent vs 24 percent prior quarter.
- Top blockers: redlines, SOC2 proof, procurement cycle length.

Next Steps

Step	Owner	Date
Launch SPIF: +10 percent on Tier A logos	Sales Ops	11/12
Pre-clear legal positions for SOW and DPA	Legal Lead	11/14
Security packet fast path for Stage 3+ deals	CISO team	11/13

Risks / Assumptions

- [Assumption] Two Tier A deals will accept standard DPA.
- Risk: Procurement freeze at two enterprise accounts in last week of quarter.

Sources

- CRM report: /Sales/CRM/Q4_Pipeline_2025-11-10.xlsx
- Security checklist: /RevOps/Security/Buyer_Packet_v3.pdf



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Example 2 — Operations: Q1 Capacity and Hiring Plan

Header

Title	Q1 Capacity Plan — Support + Onboarding
Owner	VP Operations
Date	11/10/2025

Outcome / Ask

Decision: Approve 3 temp hires through March to hold SLA at 92 percent.

Key Points (3–5 bullets)

- Ticket volume forecast +18 percent vs Q4, driven by new enterprise launches.
- Current team can handle +10 percent with overtime; risk to SLA beyond that.
- Backlog drivers: SSO setup, data migration questions, custom billing.
- Temp hires cost \$78K; overtime alternative costs \$92K and increases churn risk.

Next Steps

Step	Owner	Date
Post roles via agency and shortlist	People Ops	11/15
Train on SSO + migration SOPs	Support Lead	11/22
Weekly SLA dashboard to ELT	Ops Analytics	Starting 12/01

Risks / Assumptions

- [Assumption] Agency can fill roles in 10 business days.
- Risk: Forecast error if two planned launches slip into Q2.

Sources

- Forecast workbook: /Ops/Capacity/Q1_Forecast_v2.xlsx
- SLA dashboard: /Ops/BI/Support_SLA_Live



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Example 3 — Product: Feature Proposal with ROI

Header

Title	Feature: Admin Bulk Invite + Role Presets
Owner	PM
Date	11/10/2025

Outcome / Ask

Decision: Greenlight a 6-week build to reduce onboarding time by 35 percent.

Key Points (3–5 bullets)

- Top admin pain: adding 100+ users and setting roles file-by-file.
- Projected ROI: payback in 4.5 months from lower support load and faster go-live.
- Scope: CSV import, role presets, audit log, error handling.
- Dependencies: directory mapping, permission service refactor in Sprint 3.

Next Steps

Step	Owner	Date
PRD review with Eng + Design	PM	11/13
Scope estimate and sprint plan	Eng Lead	11/18
Pilot with 2 enterprise admins	CS Lead	12/20

Risks / Assumptions

- [Assumption] Directory mapping API supports bulk operations.
- Risk: CSV parsing edge cases increase QA time by 1 week.

Sources

- Admin interviews: /Product/Research/Admin_Onboarding_Notes.pdf
- Support tags analysis: /CS/BI/Tags_BulkInvite_Q3.csv