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AI Growth Execution System

Delivery Pack

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Version 1.0

1. System Overview

Item	Description
System Name	AI Growth Execution System.
Primary Purpose	Connect leads, content, proposals and reporting into one AI-supported workflow.
Best For	Growing businesses that need better execution across marketing, sales and management reporting.
Primary Users	Business owner, growth manager, marketing manager, sales manager or small leadership team.
Expected Benefit	Faster execution, clearer handoffs, more consistent follow-up and better visibility across growth activities.

2. Business Problem

Growth activities often happen in separate places. Content is planned in one document, leads arrive through different channels, proposals are created manually and reporting is reviewed separately.

The AI Growth Execution System creates one practical workflow that connects these activities. It helps the team turn content and lead activity into clearer commercial follow-up, proposal creation and management reporting. AI supports the workflow, but final decisions and client-facing outputs remain human-reviewed.

3. Workflow Map

1. Define the growth objective for the period.
2. Plan content and authority activity around the target audience and offer.
3. Capture and summarize incoming leads using the lead intake structure.
4. Qualify leads and identify the next best action.
5. Turn discovery or sales notes into proposal and follow-up drafts.
6. Track lead status, proposal status and next actions.
7. Summarize growth activity into a weekly or monthly management update.
8. Review results and improve the workflow for the next cycle.

4. Tools Used

- ChatGPT or Claude for structured summaries, draft creation and insight generation.
- Google Docs or Microsoft Word for proposals, briefs and final documents.
- Google Sheets, Airtable, Notion or CRM for lead and activity tracking.
- Google Drive, SharePoint or Notion for storing templates and system assets.
- Canva, Google Slides or PowerPoint if visual content or proposal assets are needed.
- Zapier, Make or similar automation tools only if a simple automation is agreed.

5. Prompt Library

Prompt	When To Use It
Growth Objective Mapper	Use at the start of a cycle to translate business goals into content, lead, proposal and reporting priorities.
Content-to-Lead Planner	Use when planning content that should support authority, trust and commercial conversations.
Lead Summary & Qualification	Use when a new lead arrives and the team needs a quick structured summary and next action.
Proposal & Follow-Up Draft	Use after a discovery call or qualified lead conversation.
Growth Report Summary	Use weekly or monthly to summarize activity, insights, stuck points and recommended actions.

6. SOP - How To Use The System

When to use this system

Use this system when the team wants to manage growth activity in a more connected way across content, leads, proposals and reporting.

Weekly operating rhythm

1. Review the growth objective and priority offer.
2. Plan or update content based on the content-to-lead template.
3. Capture all new leads in the agreed tracker or CRM fields.
4. Use the lead summary and qualification prompt for new opportunities.
5. Create proposal and follow-up drafts where relevant.
6. Update the growth tracker with status and next actions.
7. Create a short growth report summary for management review.
8. Agree next actions for the following week.

7. Quality Control Checklist

- The content output matches the company positioning and target audience.
- Lead summaries are based only on available information and do not invent facts.
- Lead qualification criteria are applied consistently.
- Proposal drafts are reviewed for accuracy, scope, pricing and promises before sending.
- Follow-up emails are professional, specific and aligned with the client conversation.
- Growth reports are checked against source data before being shared.
- Every final client-facing output is reviewed by a human owner.
- Sensitive data is handled only through approved company tools.

8. Example Output

Before	After
Content, leads, proposals and reports are handled separately.	A connected workflow shows how content creates conversations, how leads move forward and what should happen next.
Follow-up depends on memory or manual notes.	Lead and discovery context is summarized into structured next actions and follow-up drafts.
Management sees activity but not always clear insights.	Weekly or monthly growth reports summarize activity, bottlenecks and recommended actions.

9. Training Notes

- The system is designed to support execution, not replace the team.
- Each workflow step needs a clear owner.
- AI outputs should be treated as first drafts or structured summaries.
- The team should record examples where the system worked well or needs improvement.
- The weekly review is essential because it turns activity into learning and optimization.

10. Next Steps

1. Use the system for one full growth cycle.
2. Collect feedback from the team members using it.
3. Review lead follow-up speed, proposal consistency and reporting clarity.
4. Identify any missing templates, unclear ownership or workflow friction.
5. Update prompts and SOPs based on real usage.
6. Consider ongoing monthly review if the system becomes central to growth execution.

Ready to Execute?

Let's put the AI Growth Execution System to work for your business.

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Get in touch to schedule your next growth review.