

A DIAGNOSTIC WORKBOOK

The 90-Day Executive Operating System *Self-Audit*

The set of rhythms, documents, and handoffs that let a senior person make decisions, keep calibration, and make the role coverable · and the layers where the executive is currently compensating for the infrastructure personally.

FOR

Founders · CEOs · COOs ·
Heads of function

TIME

60-90 minutes

CADENCE

Once per quarter

00 BEFORE YOU START

An executive operating system is the set of rhythms, documents, and handoffs that let a senior person make decisions, keep calibration, and make the role coverable.

When one of those layers is absent or badly wired, the executive compensates personally. The compensation becomes the bottleneck the company grows around.

This workbook is a structured look at those layers. Sixty to ninety minutes, alone or with a chief of staff or peer, once per quarter.

WHO THIS IS FOR

- Founders past the first year of post-fit execution.
- CEOs and COOs running something with more than twenty reports in aggregate.
- Heads of function whose calendar has started to feel like the primary artifact of their job.
- Operators in the first ninety days of a new role, trying to install the system before the company installs them into its existing shape.

WHO THIS IS NOT FOR

Individual contributors looking to improve personal productivity. This is an audit of organizational infrastructure routed through a specific role, not a time-management template.

00 HOW TO USE THIS

Block ninety minutes. Treat it as a meeting with yourself.

-
- 01** Do the **quick summary page** first (about fifteen minutes). It produces a score and points you to the sections most worth the remaining time.
-
- 02** Work through the **eight audit sections**. Each one has a short framing, six rated questions, a fillable evidence block, two or three failure signs, and a short recap.
-
- 03** End with the **90-day action plan**, which pulls directly from the section recaps.
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THE THREE-POINT SCALE

Rate each audit question on this scale.

0**Missing.**

The practice does not exist, or cannot be pointed to.

1**Inconsistent.**

The practice exists sometimes, when remembered or prompted.

2**Reliable.**

Someone else could describe the practice and reproduce it in your absence.

Honesty matters more than completeness. Charitable ratings produce a bad plan. The goal is a short, accurate action plan at the end, not a perfectly completed workbook.

A second pass with a chief of staff, peer, or direct report is useful. They will rate several sections differently than you do. *The gap is where the diagnosis sits.*

Scorecard.

For each question, check the answer that most accurately describes the current state. Scores are in brackets.

01 Input system

The standing sources that shape my read on the business...

- A I can list them, and each has a named owner. [2]
- B I can name most, but ownership is fuzzy. [1]
- C It depends who gets to me first. [0]

02 Decision capture

The last three significant decisions I made, written down with reasoning, in a durable place...

- A All three. [2]
- B One or two. [1]
- C None. [0]

03 Review rhythms

Weekly, monthly, and quarterly operating reviews all exist, are distinct, and actually happen...

- A Yes, all three. [2]
- B Two of the three. [1]
- C One or none. [0]

04 Delegation

For each direct report, both of us could write down the decisions they own without checking with me...

- A Yes. [2]
- B I could, but they might not match me. [1]
- C Not really. [0]

- 05 Meeting load and coordination drag**
For each recurring meeting on my calendar, I can state the decision or output it exists to produce...
- A Yes, and I have cancelled or reshaped at least one in the last quarter. [2]
 - B For most. [1]
 - C For some, at best. [0]
-
- 06 Absence resilience**
If I went dark for three weeks, the first meaningful break would come...
- A After two weeks or later, and a covering peer has a document to work from. [2]
 - B Within a week. [1]
 - C Within two days, or I cannot say. [0]
-
- 07 Operator debt**
I can point to written criteria, playbooks, or logs for the judgments I routinely make...
- A For most recurring categories. [2]
 - B For some, but much of it lives in my head. [1]
 - C It mostly lives in my head. [0]
-
- 08 AI in the role**
AI has materially changed how at least one recurring workflow in my function runs, and I can describe the change...
- A Yes, and I also know roughly who on the team is a heavy, light, or invisible user. [2]
 - B Partially, or only for edge tasks. [1]
 - C Not really; if AI is being used, it is not visible to me. [0]

TOTAL _____ / 16

INTERPRETATION

- 13 - 16** The operating system is broadly functional. Use the audit to find the two or three weakest edges.

- 09 - 12** Several layers are working; some are improvised. Focus the audit on any section scored 0 or 1 above.

- 05 - 08** The role is running on the executive's personal compensation more than on infrastructure. Do the full audit.

- 00 - 04** The operating system is largely absent. Do the full audit and plan to re-run this workbook every thirty days for the first two quarters.

Any single question scored 0 is a priority section in the audit, regardless of total.

01 AUDIT SECTION Input system and information diet.

An executive is a function of what reaches them. A bad input system produces a skewed read that does not feel skewed, because the skew is coming from the shape of the inputs.

AUDIT QUESTIONS

#	QUESTION	0	1	2
1.1	I can list the standing inputs (dashboards, reports, one-on-ones, metrics reviews) that shape my read, and I review the list.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.2	Each standing input has a named owner who would notice if it broke.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.3	At least one input gives me a direct, unmediated read on operating reality.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.4	I know which of my inputs are AI-mediated and what that is doing to my calibration.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.5	Stale inputs get removed, not just ignored.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.6	I could describe my input system to a new chief of staff in ten minutes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SECTION SCORE _____ / 12

EVIDENCE · THE FIVE MOST IMPORTANT INPUTS THAT SHAPE MY CURRENT READ

#	INPUT	OWNER	CADENCE	AI-MEDIATED? (Y/N)
1				
2				
3				
4				
5				

COMMON FAILURE SIGNS

- ‘It depends who gets to me first.’
- Dashboards filtered down to a view that hides the parts the executive prefers not to see.
- A significant input lives entirely in one direct report’s head.

SECTION RECAP

Strongest weakness _____

Strongest existing asset _____

One change in the next 90 days _____

02 AUDIT SECTION Decision capture and revisit logic.

• Companies forget what they decided. Within six months the texture drops out. Without a capture habit, the same decision gets re-run with worse context and no memory of the original reasoning.

AUDIT QUESTIONS

#	QUESTION	0	1	2
2.1	Significant decisions get written down in a durable place within a week.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.2	Each captured decision includes the reasoning, not only the outcome.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.3	Captured decisions include the conditions under which they should be reconsidered.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.4	Decisions made in side conversations or informal channels make it into the record.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.5	Past decisions are reviewed often enough to notice when one has quietly become wrong.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.6	A new hire in twelve months could read the log and understand why the function looks the way it does.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SECTION SCORE _____ / 12

EVIDENCE · THE LAST THREE DECISIONS THAT MATERIALLY CHANGED HOW THE FUNCTION OPERATES

#	DECISION	WHERE IT IS RECORDED	REASONING RECONSTRUCTABLE? (Y/N)	REVISIT CONDITION CAPTURED? (Y/N)
1				
2				
3				

COMMON FAILURE SIGNS

- Major decisions live only in chat history or email threads.
- The decision log exists but has not been written in for more than two months.
- People below the executive quietly run shadow records because the official one is not trusted.

SECTION RECAP

Strongest weakness _____

Strongest existing asset _____

One change in the next 90 days _____

03 AUDIT SECTION Review rhythms and thinking time.

Past a hundred people a company needs three rhythms: weekly, monthly, quarterly. The monthly is the course-correction layer, and it is the one most often missing. Without protected thinking time the executive does not do the work rhythms are meant to enable.

AUDIT QUESTIONS

#	QUESTION	0	1	2
3.1	A weekly operating review exists, has an agenda, and produces decisions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.2	A monthly review exists, is distinct from the weekly, and actually happens.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.3	A quarterly reset exists and reshapes priorities rather than rubber-stamping them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.4	Each rhythm has a named owner responsible for agenda, inputs, and follow-through.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.5	I have protected thinking time on my calendar that is not hostage to the next urgent thing.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.6	Each rhythm is robust to my absence for a single cycle.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SECTION SCORE _____ / 12

EVIDENCE · THE CURRENT SHAPE OF MY RHYTHMS

RHYTHM	EXISTS? (Y/N)	OWNER	TYPICAL DECISIONS IT PRODUCES
Weekly			
Monthly			
Quarterly			

PROTECTED THINKING TIME PER WEEK (HOURS) _____

COMMON FAILURE SIGNS

- The weekly has become a round-robin of updates with nothing decided.
- The monthly is absent, or is a longer version of the weekly.
- The quarterly is the last month of work re-presented with better slides.

SECTION RECAP

Strongest weakness _____

Strongest existing asset _____

One change in the next 90 days _____

04 • Delegation, handoffs, and follow-through.

AUDIT SECTION

Delegation lets an executive hold more than a single person’s working memory. Handoffs are where delegation either succeeds quietly or fails expensively. The gap between delegated work, delegated authority, and documented decision thresholds is where the role becomes the bottleneck.

AUDIT QUESTIONS

#	QUESTION	0	1	2
4.1	For each direct report, I could write down the decisions they own without checking with me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.2	That same list exists in writing in a place my reports can see.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.3	Handoffs are documented well enough that the other person can pick up without a meeting.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.4	I can point to a piece of work currently running where I deliberately stepped out after handoff.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.5	When a delegated decision comes back to me anyway, I know why, and I close the loop.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.6	Follow-through on delegated work gets tracked; it does not drift.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SECTION SCORE _____ / 12

EVIDENCE · THREE THINGS I AM CURRENTLY DOING THAT A DIRECT REPORT SHOULD BE DOING

#	TASK	WHO SHOULD OWN IT	WHY DELEGATION HAS NOT HAPPENED
1			
2			
3			

COMMON FAILURE SIGNS

- The executive is copied on a high volume of messages that do not require their input.
- Direct reports ‘check in’ on decisions that are nominally theirs.
- A new hire cannot produce a useful first draft without a meeting, because criteria live only in the executive’s head.

SECTION RECAP

Strongest weakness _____

Strongest existing asset _____

One change in the next 90 days _____

05 AUDIT SECTION Meeting load and coordination drag.

A senior calendar is a leading indicator. Meeting load is one part of the picture; the other is coordination drag, the meetings that exist because a document, owner, or decision right is missing elsewhere.

AUDIT QUESTIONS

#	QUESTION	0	1	2
5.1	I know, within a few hours, how many hours a week I spend in meetings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.2	For each recurring meeting, I can state the decision or output it exists to produce.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.3	I have cancelled or reshaped at least one recurring meeting in the last 90 days.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.4	Ad-hoc requests that do not require me get redirected before they reach my calendar.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.5	I can identify meetings that exist because of a missing document, missing owner, or missing decision right, rather than because the meeting itself is needed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.6	At least a quarter of my week is unstructured time that does not default to meetings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SECTION SCORE _____ / 12

EVIDENCE · CALENDAR SNAPSHOT FROM LAST FULL WEEK

METRIC	COUNT
Total meeting hours	
Recurring meetings I attend	
Meetings whose output I could not name	
Meetings that exist because of a missing document, owner, or decision right	
Unstructured blocks of 90+ minutes	

COMMON FAILURE SIGNS

- Recurring meetings inherited from a previous organizational shape, still happening, original reason forgotten.
- Back-to-back 30-minute blocks that leave no thinking time.
- Meetings scheduled to compensate for a document that should exist.

SECTION RECAP

Strongest weakness _____

Strongest existing asset _____

One change in the next 90 days _____

06 AUDIT SECTION Absence resilience and executive dependency.

The three-week absence test is the cleanest single diagnostic for an executive operating system. What would break first, second, third tells you where the role's dependencies sit and which ones the executive is carrying personally.

AUDIT QUESTIONS

#	QUESTION	0	1	2
6.1	A document exists that a peer could use to cover my role for three weeks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.2	That document covers standing rhythms, live decisions, and known fragile edges.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.3	My direct reports know what they are empowered to decide in my absence.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.4	I have taken at least one absence of a week or more in the last year, and the function ran.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.5	Recurring rhythms have backup chairs named.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.6	I can name the most fragile single-point dependency in the role and a plan to reduce it.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SECTION SCORE _____ / 12

EVIDENCE · THE FIVE THINGS THAT WOULD BREAK FIRST IF I WENT DARK FOR THREE WEEKS STARTING TOMORROW

ORDER	WHAT BREAKS	SPEED OF FAILURE	WHO ABSORBS IT	WHY IT IS DEPENDENT ON ME
1				
2				
3				
4				
5				

COMMON FAILURE SIGNS

- The honest answer to ‘who covers you’ is ‘nobody, things just wait.’
- Handoff document exists but has not been updated since the role grew.
- Direct reports have not practiced operating without the executive in any meaningful span.

SECTION RECAP

Strongest weakness _____

Strongest existing asset _____

One change in the next 90 days _____

07 AUDIT SECTION Operator debt and unresolved loops.

Operator debt is decisions, judgments, and operating logic trapped in the executive's head and not written down in reusable form. It compounds silently, and the interest is paid in attention the executive spends on judgment calls that infrastructure should have absorbed.

AUDIT QUESTIONS

#	QUESTION	0	1	2
7.1	For my recurring judgment categories (hiring bar, roadmap trade-offs, vendor approvals, budget reallocations, escalation calls), written criteria or playbooks exist.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.2	Those written criteria are actually used by others, not just by me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.3	When I make a novel judgment call, the reasoning gets externalized within a week.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.4	If I left tomorrow, my successor could reconstruct my operating logic from written artifacts.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.5	I can distinguish between judgments I am deliberately keeping in my head and ones I have never written down.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.6	The team below me is not quietly carrying the interest on my debt by duplicating judgment, re-asking, or working around its absence.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SECTION SCORE _____ / 12

EVIDENCE · FIVE JUDGMENT CATEGORIES I ROUTINELY RUN FROM MY HEAD

#	CATEGORY (E.G., 'WHAT MAKES A SENIOR HIRE A YES')	WRITTEN DOWN SOMEWHERE? (Y/N)	COST OF IT LIVING IN MY HEAD
1			
2			
3			
4			
5			

COMMON FAILURE SIGNS

- 'I would know it when I see it' is the dominant criterion for recurring judgments.
- The team asks the executive the same kinds of questions repeatedly, because the answer has never been written.
- Hires around a gap, because closing the gap would take a week the executive has not found.

SECTION RECAP

Strongest weakness _____

Strongest existing asset _____

One change in the next 90 days _____

08 AUDIT SECTION AI in the role: real workflow change vs superficial use.

AI is in the role whether it has been acknowledged or not. The question is whether it has changed how work actually runs, or whether it is being used at the edges while the core workflow, calibration, and review loops are unchanged.

AUDIT QUESTIONS

#	QUESTION	0	1	2
8.1	I can name at least one recurring workflow in my function that AI has materially changed in inputs, cadence, ownership, or calibration, and I can describe the change.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8.2	I can distinguish that from AI use that is only at the edges (drafting, summaries, search, translation) without changing the underlying workflow.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8.3	I know roughly who on my team is a heavy, light, or invisible user of AI, and I have thought about what that unevenness is doing to output and calibration.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8.4	A short written statement exists for my function covering what AI use is expected, allowed, or prohibited.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8.5	I know which of my review and calibration loops have become AI-mediated, and what that is doing to my read.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8.6	Hiring and promotion criteria for my function have been reviewed in light of how the role actually runs now.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SECTION SCORE _____ / 12

EVIDENCE · THE LAST THREE OUTPUTS THAT CROSSED MY DESK FOR REVIEW

#	OUTPUT	APPROX. SHARE THAT WAS AI-ASSISTED	CAN I TELL? (Y/N)	DID AI CHANGE THE REVIEW PROCESS ITSELF? (Y/N)
1				
2				
3				

COMMON FAILURE SIGNS

- ‘We use AI’ is the answer, but no specific workflow change can be named.
- Reviews have become faster because work is pre-filtered by AI, and the filtered version is read as though it were raw signal.
- No written position on AI exists, so everyone runs a private policy.
- AI use is assumed to be uniform across the team when it is not.

SECTION RECAP

Strongest weakness _____

Strongest existing asset _____

One change in the next 90 days _____

PLAN THE 90-DAY ACTION PLAN

The *90-day* action plan.

Pull directly from the eight section recaps. The point is a short list that gets done, not a full inventory.

TOP THREE BOTTLENECKS

The three places where the operating system is most constraining the role today.

#	BOTTLENECK	SOURCE SECTION	EVIDENCE
1			
2			
3			

TOP THREE SYSTEMS TO BUILD OR WRITE

Mostly drawn from Section 7 (operator debt) and Section 2 (decision capture); can draw from any section recap.

#	SYSTEM OR DOCUMENT	OWNER	FIRST EVIDENCE IT EXISTS (DATE)
1			
2			
3			

TOP THREE THINGS TO STOP

Meetings, reports, habits, or standing commitments to remove in the next 90 days.

#	THING TO STOP	WHO NEEDS TO KNOW	STOP DATE
1			
2			
3			

ONE RECURRING REVIEW TO REDESIGN

RHYTHM	CURRENT SHAPE	NEW SHAPE	FIRST SESSION UNDER NEW SHAPE (DATE)
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ONE SINGLE-POINT DEPENDENCY TO REDUCE

DEPENDENCY	WHY IT IS FRAGILE	ACTION TO REDUCE IT	TARGET DATE
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ONE AI WORKFLOW CHANGE TO MAKE DELIBERATE

CURRENT WIRING	PROBLEM WITH IT	NEW WIRING	EVIDENCE THE CHANGE HAS LANDED
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END CLOSING NOTE

The infrastructure that will actually exist at the end of the 90 days...

If the plan has more than a handful of items, cut. The 90 days are real. The infrastructure that will actually exist at the end of them is the infrastructure someone is actively building, not the infrastructure on a wishlist.

Re-run the workbook at the end of the 90 days. The ratings should have moved. *If several have not, the next conversation is not about the system. It is about why the plan did not land.*

SIGNED _____ DATE _____