PDF-to-Action System — Pro Edition

Founder Execution Playbook

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This document is designed for operational implementation, not theory.

PDF-to-Action System — Pro Edition

Version: 2.0 **Audience:** Founders, analysts, operators, PMs, consultants **Primary Outcome:** Convert long documents into clear decisions and execution tasks in under 30 minutes

1) The Core Problem

Most people read PDFs and produce summaries. Few produce decisions. Almost nobody produces executable task plans.

This system closes that gap.

2) Standard Output Pack (Every Document)

For each document, generate exactly 5 outputs:

1. Executive Summary (max 500 words) 2. Decision Memo (A/B/C options) 3. 7-Day Action Plan (owner + deadline) 4. Risk Register (probability/impact/mitigation) 5. Stakeholder Update Draft

If you skip one, downstream execution breaks.

3) Fast Processing Pipeline (5 Stages)

Stage A — Intake (3-5 min)

Define:

- Objective (decide / implement / brief)
- Audience (founder / team / investor / client)
- Deadline (hard date/time)

Stage B — Extraction (8-12 min)

Pull only:

- thesis
- constraints
- assumptions
- key numbers
- recommendations

Tag each line as:

- [FACT]
- [ASSUMPTION]
- [RISK]

Stage C — Structuring (5-8 min)

Create option table:

- Option
- Expected impact

- Effort

- Risk

- Time-to-value

Stage D — Actionization (5-8 min)

Convert selected option into tasks:

- task

- owner

- due date

- success metric

Stage E — Review (3-5 min)

Quality checks:

- Are all critical claims source-backed?

- Are assumptions explicitly labeled?

- Does every action have owner + date?

4) Decision Memo Template

Decision Statement What decision is required now?

Options

- Option A

- Option B

- Option C

Trade-off Summary Which option optimizes impact vs risk vs speed?

Recommended Path Selected option + rationale in 3 bullets.

Immediate Next 3 Moves

- move 1

- move 2

- move 3

5) 7-Day Action Plan Template

Day 1: Align objective + owners Day 2: Execute phase 1 Day 3: Execute phase 2 Day 4: Validate outputs Day 5: Stakeholder review Day 6: Final revisions Day 7: Publish + retrospective

Each day must have:

- owner

- output artifact

- acceptance criteria

6) Risk Register Template

Fields:

- risk_name

- trigger

- probability (low/medium/high)

- impact (low/medium/high)

- mitigation

- owner

- review_date

Rule: No task plan launches without risk register.

7) AI Prompt Blocks (Model-Agnostic)

Prompt 1: Extract only what changes decisions "From this document, extract only statements that impact strategic choices. Label each as FACT, ASSUMPTION, or RISK."

Prompt 2: Build trade-off table "Create three options from the extracted findings. Compare by impact, effort, risk, and time-to-value."

Prompt 3: Convert to 7-day plan "Turn the selected option into a 7-day plan with owner, deliverable, and measurable success criteria."

Prompt 4: Draft stakeholder update "Write a concise update for leadership: what we learned, what we decided, and what happens next."

8) Quality Rubric (Score 1-5)

- Clarity

- Decision usefulness

- Actionability

- Risk visibility

- Stakeholder readability

Minimum acceptable quality = average score 4.0+

9) 15-Minute Emergency Mode

When time is tight:

- 5 min extraction

- 5 min decision memo

- 5 min next-3-actions

This is for triage only, not final planning.

10) Team SOP (Operational Use)

Naming convention `YYYY-MM-DD_topic_owner_version`

Folder structure

- /source-pdf
- /summary
- /decision
- /actions
- /risks

Weekly audit Every Friday:

- review action completion rate
- review decision quality score
- identify recurring assumptions that were wrong

11) Common Failure Modes

Failure: output is "smart" but unusable Fix: enforce owner + date for each action

Failure: hidden assumptions Fix: mandatory FACT/ASSUMPTION tags

Failure: analysis paralysis Fix: force 3 options max + one selected path

Failure: no adoption by team Fix: add stakeholder-ready 1-page update as required deliverable

12) Use Cases

- Investor memo digestion
- Vendor proposal review
- Legal/policy update conversion
- Product requirement extraction
- Competitive intelligence brief

13) Final Checklist

- ■ Objective defined
- ■ Output pack complete (5/5)
- ■ Quality score >= 4.0
- ■ Owners + deadlines assigned
- ■ Stakeholder update sent