PLAYBOOK · WALKTHROUGH

SCALE

Set · Chart · Align · Launch · Evolve

The five decisions that come before any AI tool, delivered as five Claude Cowork plugins you install one at a time. From the session to a signed charter, a priced friction map, a build-or-buy call, a running pilot, and the rhythm that keeps it alive.

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Jonathan "Coach K" Kvarfordt · therevenueaireport.com

Covers: `gtm-ai-os-core` · `scale-set` · `scale-chart` · `scale-align` · `scale-launch` · `scale-evolve`

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> SCALE points inward: how your revenue org adopts AI. If you want to know who to go after and what to say, that's the GTM AI OS, a separate set of plugins that shares this workspace. Section 10 shows how they connect.

1 · Quick Start

One plugin, one line, answer what it asks. In this order.

1

Add `gtm-ai-os-core.plugin` (Customize → Browse plugins → upload)

```
› Set up my workspace.
```

It checks for an existing workspace first. Then: folder access, which systems you run, which track (answer **SCALE**), and quick or advanced onboarding.

2

Upload `scale-set.plugin`

```
› Build my outcome charter.
```

Then, on the charter it produced:

```
› Run five whys, twice.
```

3

Upload `scale-chart.plugin`

```
› Map my friction.
```

Then:

```
› Rank the friction.
```

```
› Run the data inventory.
```

4

Upload `scale-align.plugin`

```
› Do we need AI for this?
```

If the answer is yes:

```
› Match the capability.
```

```
› Score the vendors.
```

```
› Write the guardrails.
```

5

Upload `scale-launch.plugin`

```
› Scope the pilot.
```

When it has a week of data:

```
› Pitch this to my exec team.
```

6

Upload `scale-evolve.plugin`

```
› Did the pilot work?
```

```
› Set the cadence.
```

```
› Draft the CoE charter.
```

```
› Write the AI policy.
```

ANY TIME YOU'RE LOST

```
› What's my status?
```

2 · What SCALE is, and what it isn't

Five decisions, in order. Each one produces a document you can hand upward.

Step	The decision	What you leave with	Plugin
SET	Which number are we moving, and why is it stuck?	Strategic Outcome Charter, signed. Two five-whys chains. A gap type.	`scale-set`
CHART	Where does work stall, what does it cost, and is the data ready?	Friction Map with a dollar figure. Opportunity matrix. Data inventory.	`scale-chart`
ALIGN	Does this need AI at all? What capability? Build, buy, or partner?	Capability decision memo with a scored shortlist and a cancel trigger.	`scale-align`
LAUNCH	One problem, one hypothesis, which people, for how long?	Pilot charter with a stop trigger. The 60-second exec pitch.	`scale-launch`
EVOLVE	Did it work? What keeps it alive? Who owns AI now?	Dashboard, operating calendar, CoE charter, governance policy.	`scale-evolve`

SCALE does not pick accounts, write outreach, or score buyers. That's the GTM AI OS, which SCALE recommends as your first pilot in step 4.

> **Time:** about 45 minutes to install and get a signed charter. Two to three weeks to get through ALIGN with real data. A pilot runs 30 to 90 days.

3 · Before you begin

You need

1. **A Claude account with Cowork access.** Cowork is the desktop app where SCALE runs. Check claude.com for the plan that includes it, or ask your admin.
2. **Claude Cowork installed** and opened once.
3. **The zip file** containing six plugin files: `gtm-ai-os-core.plugin`, `scale-set.plugin`, `scale-chart.plugin`, `scale-align.plugin`, `scale-launch.plugin`, `scale-evolve.plugin`.
4. **A folder location** for `GTM-AI-OS`. Desktop is the default.

How to add a plugin in Claude (from the zip file)

You received a zip. Inside it is a `plugins` folder with six `.plugin` files. Unzip it somewhere you'll find again.

1. Open the **Claude Desktop app** and switch to the **Cowork** tab.
2. Click **Customize** in the left sidebar (plugins, skills, and connectors live there).

3. Click **Browse plugins**. In that window, choose the option to **upload a custom plugin file**.
4. Select `gtm-ai-os-core.plugin`. Confirm. Repeat for the five SCALE plugins, in the order in section 1.
5. Start a new Cowork session and type **What's my status?** The router lists what it can see.

> Plugins you add this way are saved on your machine. There's no marketplace and no auto-update: when a new version ships, you'll get a new zip and repeat these steps. Nothing in your workspace folder is touched by re-installing a plugin.

> IF YOUR COMPANY BLOCKS CUSTOM PLUGINS
> On Enterprise plans, an admin may have disabled custom plugin uploads. Ask them to allow it, or use the "any other AI tool" path below with the SKILL.md files as instructions.

Using this with ChatGPT, Codex, Grok, or another AI tool

The plugin files are zip archives. Inside each is a `skills/` folder, and inside each skill is a `SKILL.md`: plain-text instructions plus templates. Those instructions work in any capable AI assistant. What changes is who handles the files.

Tool	How to run SCALE there	What you do by hand
Claude Cowork	Install the plugins as above. Claude reads and writes the `GTM-AI-OS` folder on your machine and asks for connector access.	Approve sends and connector writes.
Claude on the web	Install the plugins the same way from Customize. Skills load; the folder does not.	Upload context files at the start of a session; download artifacts at the end.
ChatGPT	Create a Project (or a custom GPT). Paste the core `CLAUDE.md` and the SKILL.md of the step you're on into the instructions. Upload the templates as files.	Keep the `GTM-AI-OS` folder yourself. Upload `context/` files each session; save outputs back to `artifacts/`.
Codex	Point it at the `GTM-AI-OS` folder as the working directory. Put the core `CLAUDE.md` contents into its instructions file (AGENTS.md) and paste the current SKILL.md as the task.	Review every file change before accepting it.
Grok or another assistant	Same as ChatGPT: instructions from `CLAUDE.md` plus the current SKILL.md, templates uploaded as files.	Same: you are the file system.

> **What only works in Claude Cowork:** the router (`gtm-chief-of-staff`), automatic folder reads and writes, connector requests, and the fence check before any external action. In every other tool, you run one skill at a time and you are the fence. Nothing in SCALE sends anything anyway, so the risk is low; the OS is where it matters.

Your data, in any tool

SCALE never assumes which products you use. When a skill needs something, it asks where it lives and requests access to whatever you name, or takes an upload.

Step	Have ready
SET	Last year's board deck or plan, if you have one. Baseline numbers: win rate, ACV, cycle, opportunity count.
CHART	Whoever runs the workflow you'll map (a 20-minute conversation). CRM stage durations if available. Names of every system in the workflow.
ALIGN	Any prior vendor evaluations or security questionnaires. Access to run one demo against your own data.
LAUNCH	A sponsor who can protect the team's time. The people you'll pick.
EVOLVE	Pilot results. Existing meetings on your calendar. Any existing IT or security policy.

4 · Install the core and onboard

4.1 Upload `gtm-ai-os-core.plugin`

4.2 Start

```
› Set up my workspace.
```

The `os-install` skill will, in order:

1. **Check what exists.** If it finds a `GTM-AI-OS` folder, it tells you what's in it and asks: keep, merge, or start fresh. It also asks which plugins you already have installed and records that so the router stops guessing.
2. Ask where the folder should live. Type `default` for Desktop.
3. Ask for folder access. Select the folder in the picker. **Wait for the confirmation.**
4. Create the structure.
5. Ask which systems hold your deals, calls, and email. Name whatever you use.
6. Ask which track. Answer **SCALE**.
7. **Ask quick or advanced onboarding.**

Quick · 3 questions · 5 min	Advanced · 12 questions · 20 min
What you sell, to whom, team size Your role and who you report to The one number you'd move	Everything in Quick, plus: sponsor, motions, ICP, deal size and cycle, every system, AI tools in use and dropped, prior pilots and what happened, constraints, fiscal calendar and due dates, your best guess at the biggest stall
Writes `company.md`, `outcome.md` (draft)	Also writes `stack.md` in detail and `history.md` (prior pilots, constraints, friction guess). Every later skill starts with better context.

> Pick Advanced if you're going to run SCALE for real. Pick Quick if you're testing. You can re-run onboarding later; it merges, it doesn't overwrite.

4.3 Check

```
› What's my status?
```

You should see the workspace, the track, the onboarding depth, installed plugins, and "next: scale-outcome-charter."

5 · SET: the outcome the board will fund

5.1 Upload `scale-set.plugin`

5.2 Build the charter

```
› Build my outcome charter.
```

1. Asks for the goal the way your CEO said it. "Use AI to help sales" is fine.
2. Maps it to one challenge area: revenue growth, sales efficiency, retention, margin, expansion. One only.
3. Rewrites it until it passes the four tests: tied to core business value, quantifiable, time bound, big enough to matter. Shows you the rewrite.
4. Asks for the baseline. Offers to pull it from your CRM if connected.
5. Names which headline metric it feeds: Sourced Qualified Pipeline or Retained-and-Expanded Revenue. If neither, it says so and calls it a project, not an outcome.
6. Proposes three to five driving KPIs. You keep three, with owners.
7. Asks for owners: executive sponsor, process owner, end-user champion, data owner. **It will not accept "TBD" for the sponsor.**

YOU'LL HAVE `artifacts/scale-charter.md`. Get the sponsor's yes and record it in the file.

5.3 Find the root cause

```
› Run five whys, twice.
```

1. Chain one from your seat. It pushes past vague answers by asking what you'd see in the data.
2. Chain two from another seat: a rep, a manager, marketing, RevOps.
3. Classifies each root: Skills, Systems, Strategy, Product. Says plainly which gaps AI can help with. Strategy and Product gaps get fixed first, not automated.
4. Puts a quarterly cost on the root you'll pursue.

> CHECK
> Open the charter. A number, a date, a sponsor's name, and two chains. Missing any of those, it's a wish.

6 · CHART: where the money is leaking

The unsexy week that makes everything after it fast.

6.1 Upload `scale-chart.plugin`

6.2 Map one workflow

```
› Map my friction.
```

1. Asks which workflow holds the root cause. One. Others go on a list for later.
2. Walks it step by step: who, what activity, which system, what information flows and where it lands. Then where it stalls, and whether the stall is human or data.
3. Scores each stall on People, Process, Technology, Data. Counts handoffs.
4. Prices the top stall: frequency × time × loaded cost, plus revenue exposure. Marked Inferred until you source it.
5. Flags red flags: hand-updated CRM, conflicting records, reporting delays, more than five tools in one workflow.

6.3 Rank

```
› Rank the friction.
```

Impact and feasibility, 1 to 10 each. Plan (do first), Quick win, Reconsider, Skip. The top Plan item must connect to the charter's root cause; if it doesn't, it says which one is wrong.

6.4 Inventory the data

```
› Run the data inventory.
```

Every system in the workflow: what it holds, who owns it, whether it's reachable. Which fields still need a human (about 5%). Quality on complete, accurate, accessible, timely. Blockers that will stop an AI deployment: no owner, no export, conflicting records, regulated data with no policy.

YOU'LL HAVE `artifacts/scale-friction-map.md`, `artifacts/scale-opportunity-matrix.md`, `artifacts/scale-data-inventory.md`

> **CHECK**
> The friction map has at least four steps and one stall with a dollar figure. No number, not done.

7 · ALIGN: does it need AI, and what to buy

7.1 Upload `scale-align.plugin`

7.2 The gate

```
› Do we need AI for this?
```

Four questions, stop at the first yes: is the rule known and the input structured (automation, not AI)? Is it two systems not sharing a field (integration)? Is it that nobody documented the process (fix the process first)? Does it require reading unstructured text, judging, or deciding under ambiguity (AI candidate)? Then a cost check: would the AI cost more than the friction does?

> If the verdict is automation, integration, or process fix, ALIGN is done. Take it into LAUNCH as a pilot without AI. That's a good outcome.

7.3 Match the capability

```
› Match the capability.
```

Names the chain, in order: classification, summarization, generation, extraction, search and retrieval, orchestration. Sets the OAR level (Optimize, Amplify, Reinvent; lowest that solves it). Classifies the work as pothole, road, or bridge for human-in-the-loop. Scores the 4 Ps and readiness. Writes the expected-outcome sentence.

7.4 Build, buy, or partner

```
› Score the vendors.
```

1. Makes the call: build when AI changes what or how you sell and the context is yours; buy when speed, budget, and talent are the constraints; partner when you need it faster than you can hire and it doesn't touch your account records. Total cost of ownership either way.
2. Shortlist of three, max. Weighted scorecard: Features, Fit, Security, Scale, plus pricing and integration.
3. **The demo test:** bring your own account record to every demo. Better, faster, or more trustworthy, or it fails. If you're running the GTM AI OS, that's your Account Context; if not, the skill helps you build a minimal one.
4. For each finalist: the 90-day result that means cancel. Written to `reversal-triggers.md`.

7.5 Guardrails

```
› Write the guardrails.
```

What never ships without a human. Who can change the record. What data never leaves. The reversal trigger with an owner and a review date.

YOU'LL HAVE `artifacts/scale-capability-decision.md` with Gate, Capability, Sourcing, and Guardrails sections.

8 · LAUNCH: a pilot that survives

8.1 Upload `scale-launch.plugin`

8.2 Scope

```
› Scope the pilot.
```

1. If you haven't picked a pilot, it recommends the GTM AI OS on one motion: scoped, measurable, already governed by the fence. Say yes or name your own.
2. One problem. Two problems means two pilots.
3. Hypothesis: "We believe [change] will produce [result] because [root cause]." No "because," no charter.
4. Scope, window (30, 60, or 90 days), OAR level.
5. Team: business owner who can decide, ops lead, tech partner, two or three end users, a change champion. **Pick people on a growth trajectory, respected by peers, not your top 10%.** If it's just you, say so and it writes the solo path.
6. Three to five success criteria across usage, performance, business outcome, learning. Each with a baseline.
7. Stop trigger at the midpoint. Weekly red/yellow/green on a named day.
8. Sponsor drip cadence. Silence invites someone to reassign your people.

8.3 Pitch

```
› Pitch this to my exec team.
```

Sixty seconds, spoken: the problem and its cost, the number, what you're doing and with whom, when you'll know, the one risk and how it's bounded, the ask. Then a one-page memo with the evidence. Then a three-line weekly update template.

YOU'LL HAVE `artifacts/scale-pilot.md`, `artifacts/scale-pitch.md`

9 · EVOLVE: the rhythm, the CoE, the governance

9.1 Upload `scale-evolve.plugin`

9.2 Judge the pilot

```
› Did the pilot work?
```

Every criterion against its baseline. Stage-to-stage diagnosis: early drop means ICP or signal (back to KNOW), late drop means motion or skill, post-sale drop means product or onboarding. The two headline metrics, restated. Three layers: executive, management, technical. One call: expand (to a defined next group, never the whole org), adjust, or stop.

9.3 Set the rhythm

```
› Set the cadence.
```

Attach artifacts to meetings you already have before creating new ones. Weekly, monthly, quarterly, annual, each with an owner and the artifact it reads. Offers to place it on your calendar if connected.

9.4 Name who owns AI

```
› Draft the CoE charter.
```

Sized to your company. Executive sponsor as high as possible (if it's HR, it says plainly: HR on the team, not in the chair). A technology co-chair and a business co-chair. Core team by title. Decision rights, intake, budget path. Biweekly cadence with two standing items. The 90-day and 12-month view, including whether a dedicated forward-deployed pod reports to the CRO, RevOps, or the CTO.

9.5 Write the rules

```
› Write the AI policy.
```

Inherits any existing IT or security policy. Thirteen areas, one paragraph each for small orgs, full policy for regulated ones. A risk register seeded from your reversal triggers and guardrails. Quality gates before anything reaches a customer, a forecast, or a system of record.

YOU'LL HAVE `scale-dashboard.md` , `scale-calendar.md` , `scale-coe.md` , `scale-governance.md`

10 · The bridge: the GTM AI OS as your first pilot

SCALE decides. The OS runs.

When LAUNCH asks what your pilot is, the cleanest answer is the GTM AI OS on one motion. It's already scoped (one loop: KNOW → DECIDE → ACT → LEARN), already measured (the two headline metrics), and already governed (the fence you signed in the core workspace). Install the four OS plugins into the same workspace and follow the GTM AI OS User Guide; SCALE's charter becomes the OS's outcome, and the OS's weekly review feeds SCALE's dashboard.

SCALE produces	The OS consumes
Strategic Outcome Charter	The number every account is scored toward
Data inventory	Which systems the OS asks for access to
Guardrails and reversal triggers	The fence and the never list
Pilot charter and tiger team	Who runs the loop and for how long
Dashboard and calendar	Where the graph report gets read

And in the other direction: once more than one team runs the OS, its weekly review tells you to come back to `scale-coe-charter` and `scale-governance`. That's the loop between the two products.

11 · When something goes wrong

"I need access to your GTM-AI-OS folder."
Cowork lost the permission. Select the folder in the picker again.

"You already have a workspace."
Choose keep, merge, or fresh. Merge is safe: it adds missing files and never overwrites.

A skill can't find the charter.
Run `scale-outcome-charter`, or take the fast path (three questions) and come back to it this week.

The charter won't save.
No number, no date, no sponsor, or it feeds neither headline metric. It tells you which.

The gate says "automation, not AI."
That's a result. Take it into LAUNCH as a non-AI pilot.

The vendor scorecard refuses a vendor.
It wasn't tested against your account record, or the shortlist is over three.

The pilot charter won't write.
Two problems, no stop trigger, or a criterion without a baseline.

I don't know which plugins are installed.
Type "What's my status?" The router lists what it recorded at install. Re-run "Set up my workspace." and answer the plugin question to update it.

12 · Glossary

Four tests · tied to core business value, quantifiable, time bound, big enough to matter.

Gap type · Skills, Systems, Strategy, Product. AI amplifies the first two.

Gate · the check for automation, integration, or process fix before any AI work.

Headline metrics · Sourced Qualified Pipeline and Retained-and-Expanded Revenue.

OAR · Optimize (time), Amplify (revenue-linked), Reinvent (business model).

Pothole, road, bridge · how much human belongs in the loop, by complexity and stakes.

Reversal trigger · the 90-day result that means cancel, with an owner and a date.

Tiger team · the pilot team, picked from the middle 60 on growth trajectory, with protected time.

CoE · Center of Excellence: two co-chairs, an executive sponsor, a core team by title, a biweekly cadence.

Track · SCALE (internal, this guide) or the GTM AI OS (external). One workspace, two products.

First-month checklist

☐ Core uploaded; "Set up my workspace." completed; advanced onboarding done; installed plugins recorded

☐ `scale-set` : charter with number, date, sponsor's yes; two five-whys chains; gap type named

☐ `scale-chart` : one workflow mapped; top stall priced; matrix ranked; data inventory done

☐ `scale-align` : gate verdict; capability chain; build/buy/partner with TCO; one demo run against your own record; guardrails and cancel trigger written

☐ `scale-launch` : pilot charter with one problem, a hypothesis, a team or solo path, a stop trigger; 60-second pitch delivered

☐ Sponsor drip started

☐ `scale-evolve` uploaded and ready for the pilot's midpoint

☐ Decision made: is the GTM AI OS the pilot? If yes, OS guide in hand

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