PLAYBOOK · WALKTHROUGH

S.C.A.L.E.

Set · Chart · Align · Launch · Evolve

One plugin. Say "Please run this for me." It asks fast or in-depth, then asks what it needs and walks you through the five decisions that come before any AI tool, one step at a time, writing one file per step.

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One file: `scale.plugin`

How this works

Install once. Say one thing. Answer what it asks.

1

Add the plugin

Claude Desktop → Cowork tab → Customize → Browse plugins → upload `scale.plugin`. One file. That's the whole install.

2

Say this

```
› Please run this for me.
```

The first thing it asks is **fast or in-depth**.

Fast	In-depth
A few questions per step. A working draft of all five steps in one sitting, about an hour. It moves from step to step on its own and only stops if it needs something you have to go get.	The full question set. One step per sitting, 30 to 45 minutes each. It stops after each step; say **next** when you're ready.
Best for: a first pass, a startup, or anyone with thin data.	Best for: a real plan with real numbers, or a regulated or larger org.

3

Answer what it asks

It creates a `SCALE` folder on your Desktop (select it in the picker when asked), asks how much you've used AI and what you sell, then starts Set. Every step reads the one before it, asks only what it needs, and writes one file. At the end it compiles the five files into one page for your CEO (outcome, where the money leaks, the call, the pilot, who owns it, your 30 days) and reads back your 30-day commitment.

Step	What it asks	You leave with
1 Set	The goal as your CEO said it; baseline; three KPIs; four owners; five whys twice	Strategic Outcome Charter with a number, a date, a sponsor; root cause and gap type
2 Chart	One workflow, step by step; where it stalls; how often and how long	Top stall priced in dollars; ranked list; data check
3 Align	Does it need AI; which capability; build, buy, or partner; what never ships unreviewed	Capability decision with a shortlist of three and a cancel trigger
4 Launch	One problem; a hypothesis; team or solo; criteria with baselines; a stop trigger	Pilot charter; 60-second pitch; weekly update
5 Evolve	Pilot results; existing meetings; company size; the one thing you'll do in 30 days	Verdict; scorecard; rhythm; who owns AI; the rules; your 30-day commitment

ANY TIME

`› What's my status?` `› Next` `› Go deeper on step 3`

> No number for Set? It offers the RGA math: average reps spend about 28% of time on revenue-generating activity, top teams 45 to 50%, and each point is roughly 0.4% of revenue. Enough to get a target on paper, labeled as an estimate.

What each step asks, and why

1 · Set

The goal the way your CEO said it. Your baseline. Three driving KPIs with owners. The four owners, and it won't accept "TBD" for the sponsor. Then five whys twice, from your seat and someone else's, so one chain doesn't become the truth. It names the gap (Skills, Systems, Strategy, Product) and says which ones AI can help with. Get the sponsor's yes before step 2.

2 · Chart

One workflow, the one that holds the root cause. Who, what, which system, where it stalls, human or data. The top stall gets a dollar figure. Everything gets ranked on impact and feasibility. Then a data check: what each system holds, who owns it, whether it's reachable. The unsexy step that makes everything after it fast.

3 · Align

The gate first: is this automation, an integration, a process problem, or a real AI candidate? "Not AI" is a good answer and it says so. If AI: the capability chain, the OAR level, how much human stays in the loop. Build, buy, or partner with total cost of ownership. Three vendors max, each tested against a real account record, not their demo data. Guardrails and the 90-day result that means cancel.

4 · Launch

One problem. A hypothesis with a "because." A window. A team picked from the middle of the pack, not your top rep, or a solo path if it's just you. Three to five criteria with baselines. A stop trigger. Then the 60-second pitch for your exec team, built from steps 1 to 3 with real numbers.

5 · Evolve

Score the pilot against the charter. Expand to a defined next group, adjust, or stop. Never the whole org. Name the weekly review: 20 minutes, one owner, what it reads and what it may change. In SCALE that's a cadence you run; the GTM AI OS adds the part that proposes changes from a log. Attach the scorecard to meetings you already have. Name who owns AI: a sponsor as high as possible, a technology co-chair and a business co-chair, a core team by title. Write the rules, sized to your company.

Your data, in any tool

SCALE never assumes which products you use. When a step needs something, it asks where it lives and requests access to whatever you name, or takes an upload. Nothing is required to start.

Step	Have ready
Set	Last year's plan if you have one; baseline numbers (win rate, ACV, cycle, opportunity count)
Chart	Twenty minutes with whoever runs the workflow; names of every system in it
Align	Any prior vendor evaluation; one real account's pain and recent change for the demo test
Launch	A sponsor who can protect the team's time
Evolve	Pilot results; your existing meeting calendar; any existing IT or security policy

Not on Claude?

The zip includes `prompts/`: one copy-paste prompt per step for Gemini, ChatGPT, Copilot, or any locked-down tool. Paste the block into a new chat, answer its questions, keep the output, and paste it into the next step. Same questions, same artifacts. You manage the files yourself.

When something goes wrong

"I need access to your SCALE folder."
Select the folder in Cowork's picker again.

It says a step is missing.
Do that step, or answer the three fast-path questions and keep going. Come back to it this week.

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

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

It won't recommend a vendor.
The vendor wasn't tested against a real record, or the shortlist is over three.

The pilot won't write.
Two problems, no stop trigger, or a criterion with no baseline.

I did fast and want more on one step.
Say "Go deeper on step 2." It reruns that step with the full questions and keeps the old file.

Something in a file is wrong.
Edit it. The files are yours.