August 2025

The AI Playbook

Sorting The Signal From The Noise

Howard Getson

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LESS IS MORE.

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Capitalogix

To Provide a Sanity Check As You Sift Through all the ”Noise” Around AI

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Capitalogix

To Help You Build Scalable Automation Playbooks

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Capitalogix

To Encourage You To Take Small, Easy Actions Today (Even If You Think You Already Have)

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What We'll Discuss Today

Why Playbooks Work

My Playbook

Avoiding Common Pitfalls in AI Adoption

The Bigger Picture

Getting Started

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Howard Getson

Capitalogix

Chief Executive Officer and Founder

Experience:

Capitalogix (2000-present): Founder and CEO

- Focused on enhanced decision-making using exponential technologies and multi-disciplinary best practices

IntellAgent Control (1991-2000): Founder & CEO

- Inc. 500 company that won an IBM-Lotus Beacon Award for best business application.

The Hastings Center (2017-Current): Advisory Council

- Bioethics and AI research institute

Education:

M.B.A. in Finance from Northwestern University's Kellogg School of Management

J.D. from Northwestern University Pritzker School of Law

B.A. in Psychology and Philosophy from Duke University

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Humans Often Recognize Big Changes On The Horizon…

But Rarely Anticipate The Consequences

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Remember When Everyone Was an Internet Company?

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Tools We Use

ChatGPT or **Type.AI** or **Lex.page** – Writing Help & Brainstorming

Grammarly or **Quillbot** or **Hemingway** – Editing & Grammar

Voilà or **Merlin** or **Perplexity Comet** – AI-powered browser assistant

Sanebox or **Cora** or **Superhuman** – Inbox Zero E-mail Sorting

RocketTypist or **TextExpander** or **PopClip** – Text Macros

Paste or **ClipMate** – Clipboard Manager

MeetGeek or **Otter.AI** or **WisprFlow or Talktastic**– Auto-Transcription

TechSmith Camtasia, Snagit, Audiate – Screen Capture & Video or Image editing

IrisClarity or **Krisp.AI** – Voice Isolation and Noise Removal

Flipboard or **Feedly** – Content Discovery

Evernote and **Notion** and **Readwise** – External Brains

Zapier and **ITTT** – Tool Integration

Pagewheel – AI-powered Lead Magnets & Landing Pages In Seconds

Systematization Doesn't Mean It Needs To Be AI

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My Personal Content Process

Aggregate

Flipboard

feedly

Filter

pocket

Readwise

Transform

Voilà

Merlin

perplexity

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The Train Is Leaving The Station …

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A Play Is Great …

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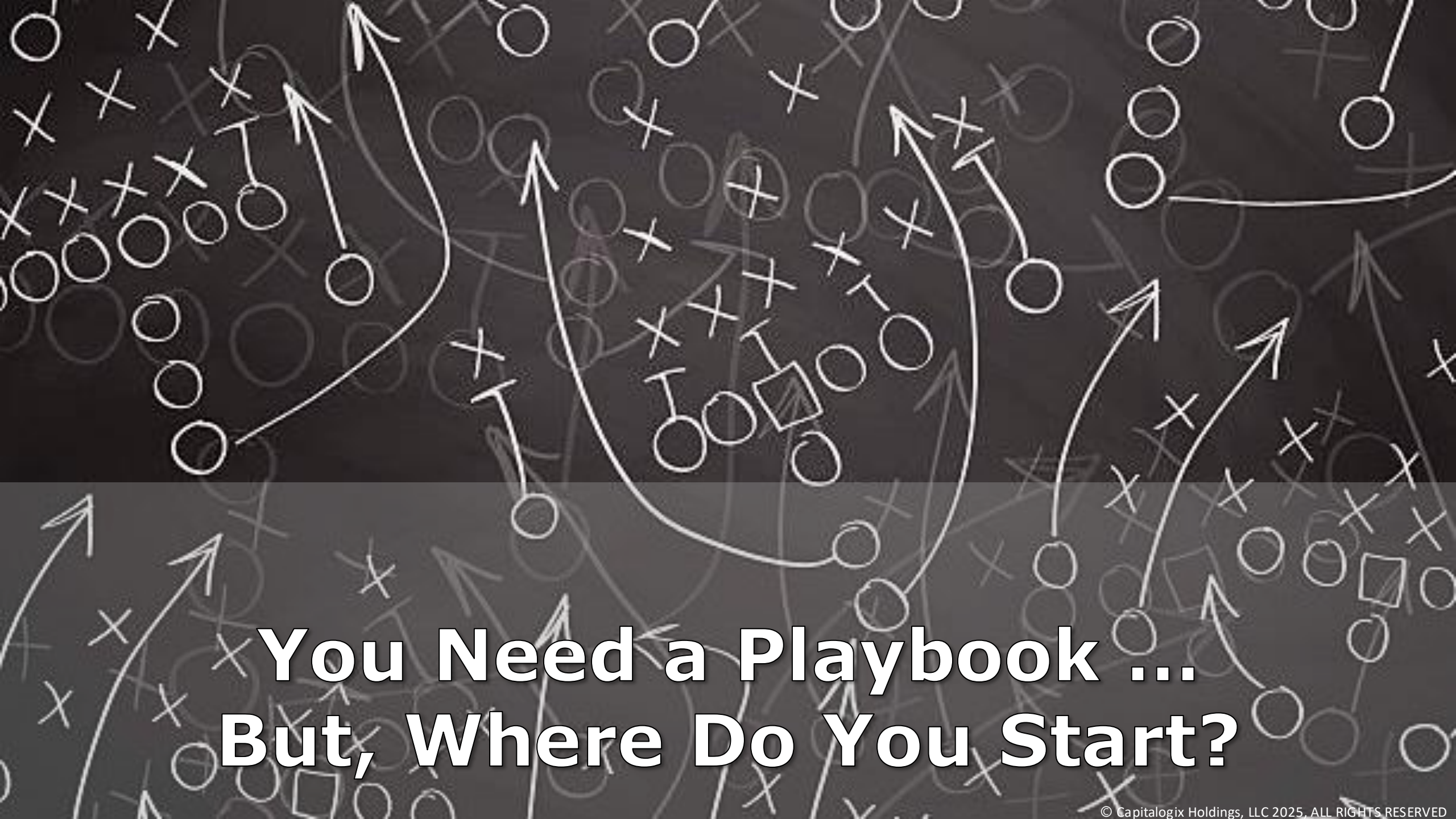

You Need a Playbook …
But, Where Do You Start?

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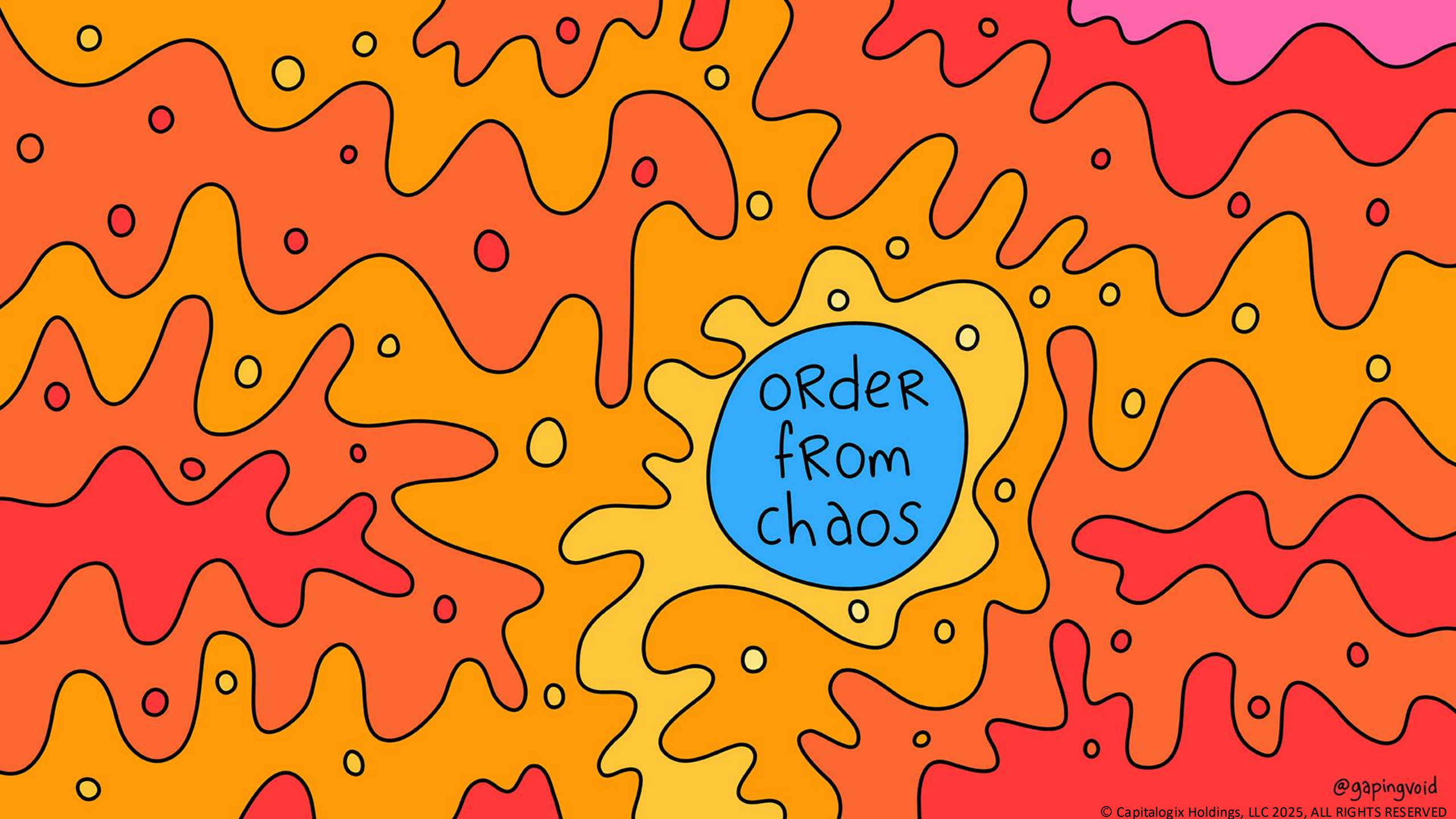

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Expectation Versus Reality …

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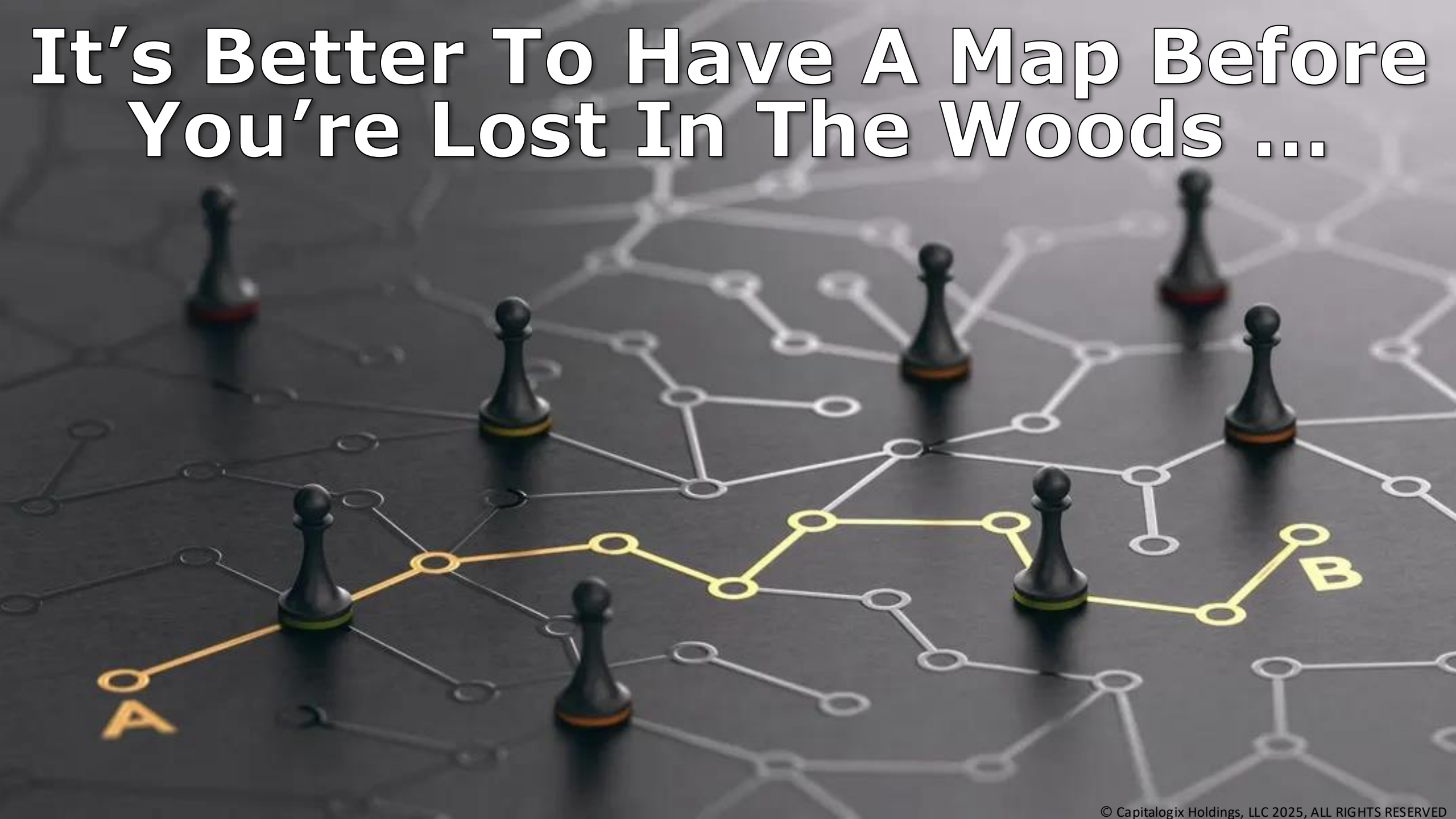
It’s Better To Have A Map Before You’re Lost In The Woods …



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Capitalogix Thought Process on Trading

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What To Trade

Indexes
- S&P 400
- S&P 500
- Nikkei 225
- Nasdaq
- Dow Jones
- Russell 2000

Metals
- Gold
- Silver
- Platinum

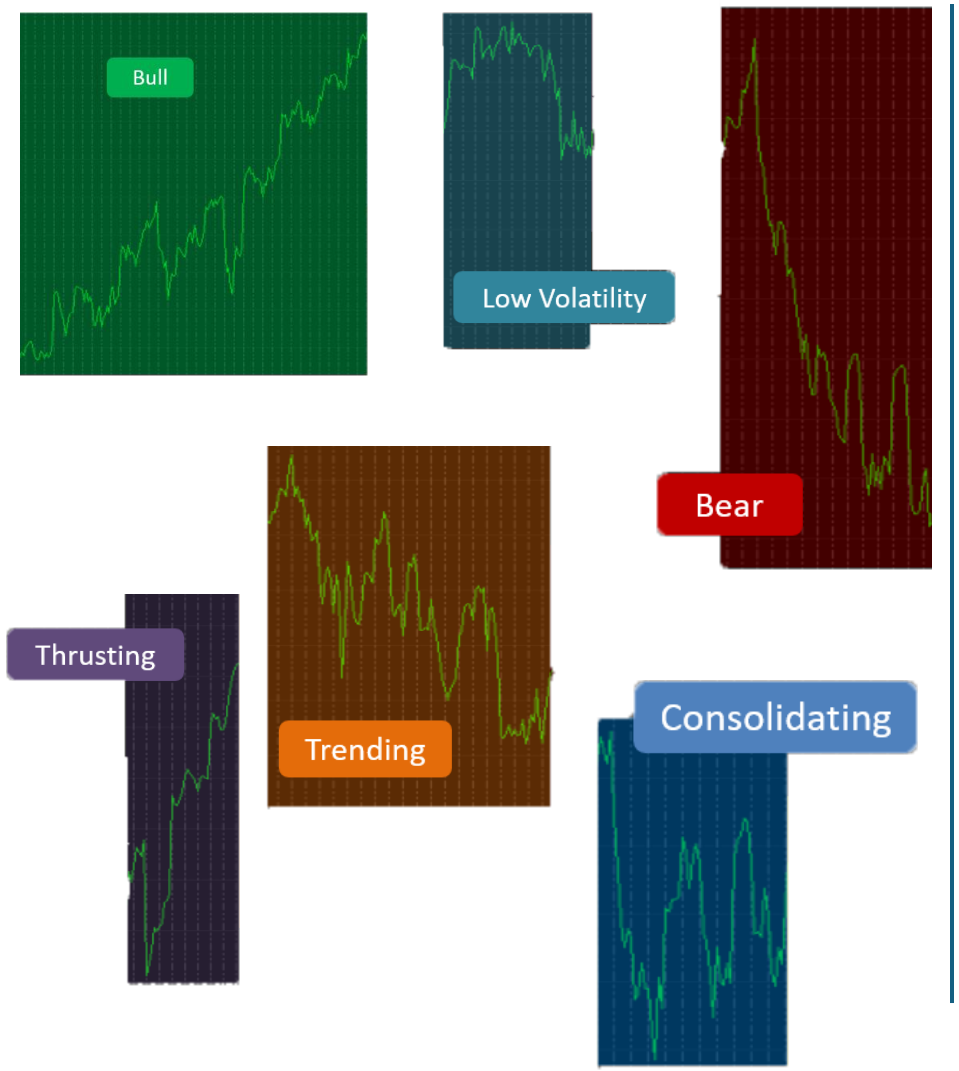
Financials
- Euro-FX
- 10 Year US T-Notes
- 30 Year Bonds

Energies
- Crude Oil
- Heating Oil
- Natural Gas
- RBOB Gasoline

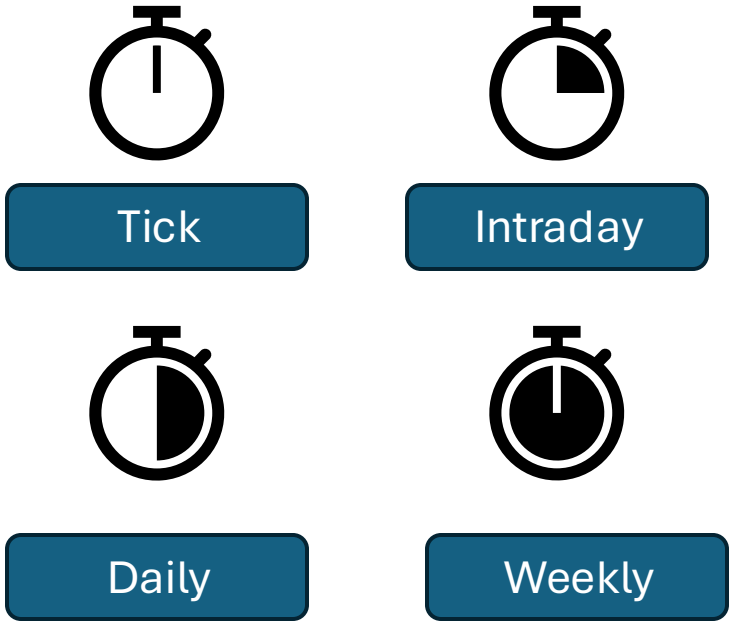
Commodities
- Feeder Cattle
- Lean Hogs
- Soybeans
- Wheat
- Coffee

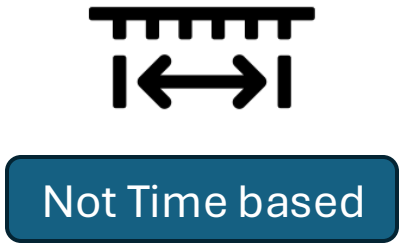
Coming Soon
- Crypto
- Orange Juice
- Soybean Oil
- Etc.

How To Trade



When To Trade





20+ Markets

Dozens of Techniques

10+ Timeframes

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Understand. Challenge. Transform.

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Think Of Your Words As A Recipe

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- Ingredients
- Order
- Intensity

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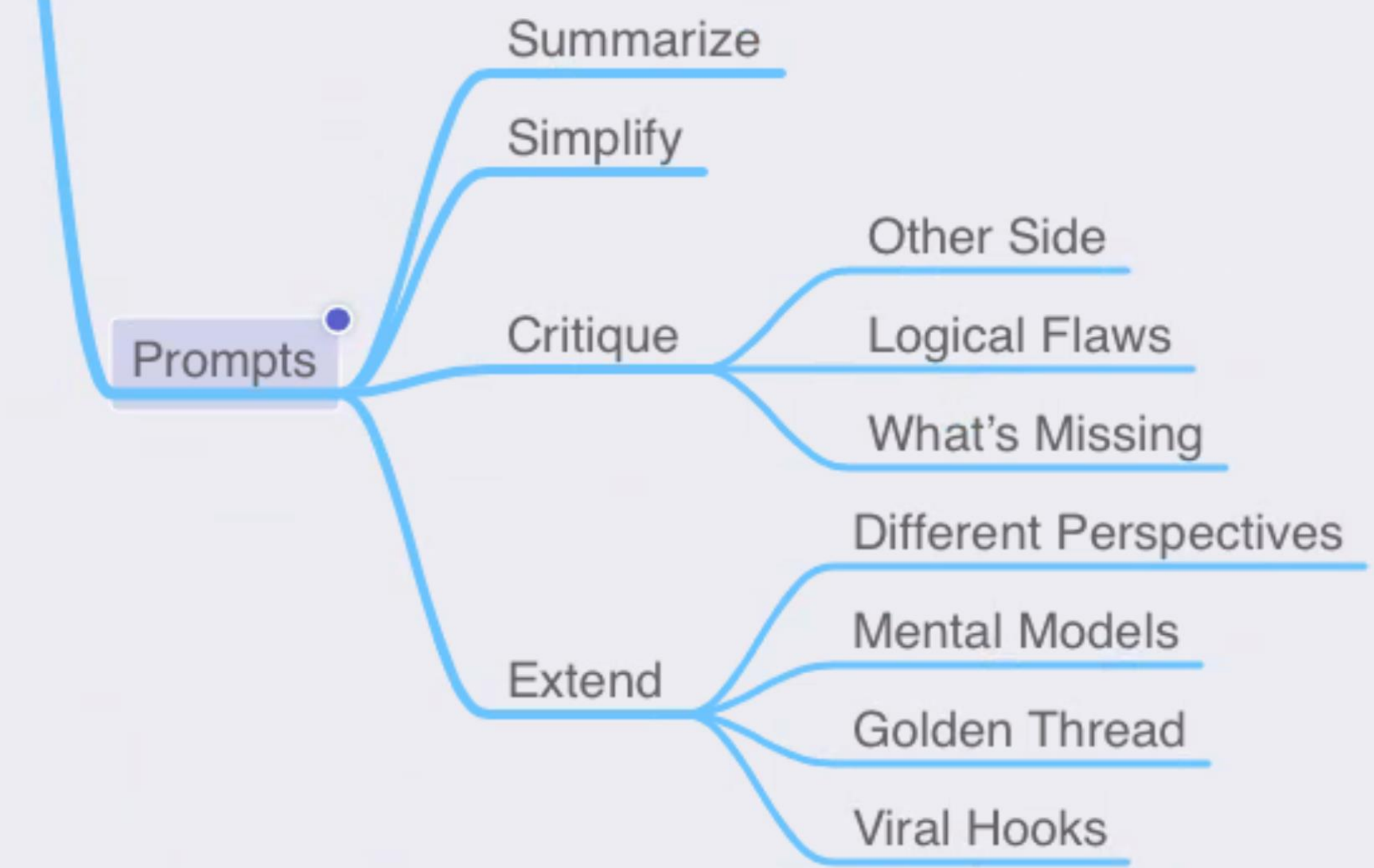

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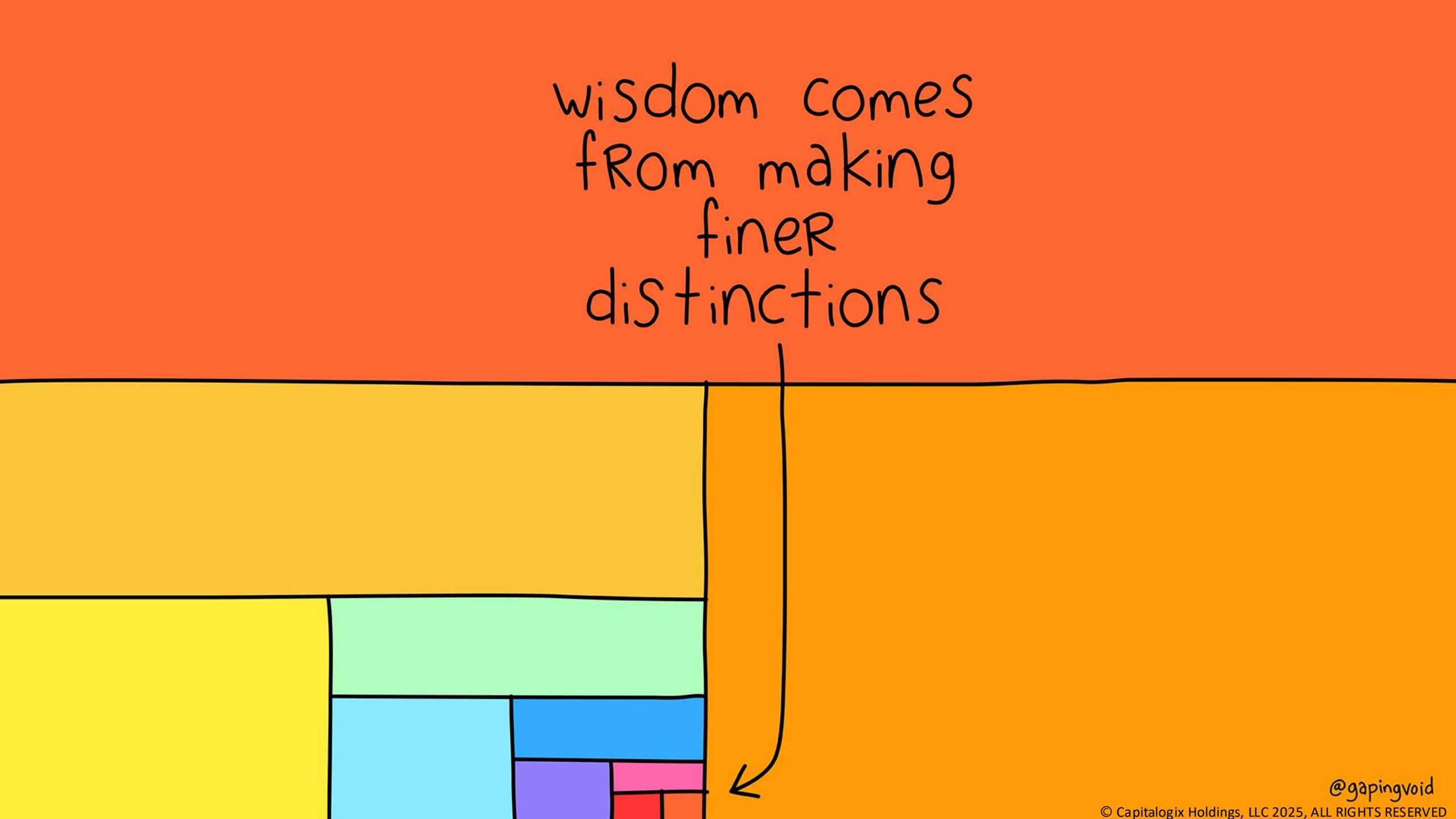

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Knowledge Management is Vital

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1. Capture Wins
2. Document Best Practices
3. Share the Learnings
4. Compound Insights
5. Create a System

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Is Your Business Better Than an 8th Grade Football Team?

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What Football Programs Get Right

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1. Coaching
2. Practice
3. Film Review
4. Depth Charts
5. Playbooks
6. Offense vs. Defense
7. Gameplans
8. Situationally Aware
9. Audibles

For More, Check Out My Article On This

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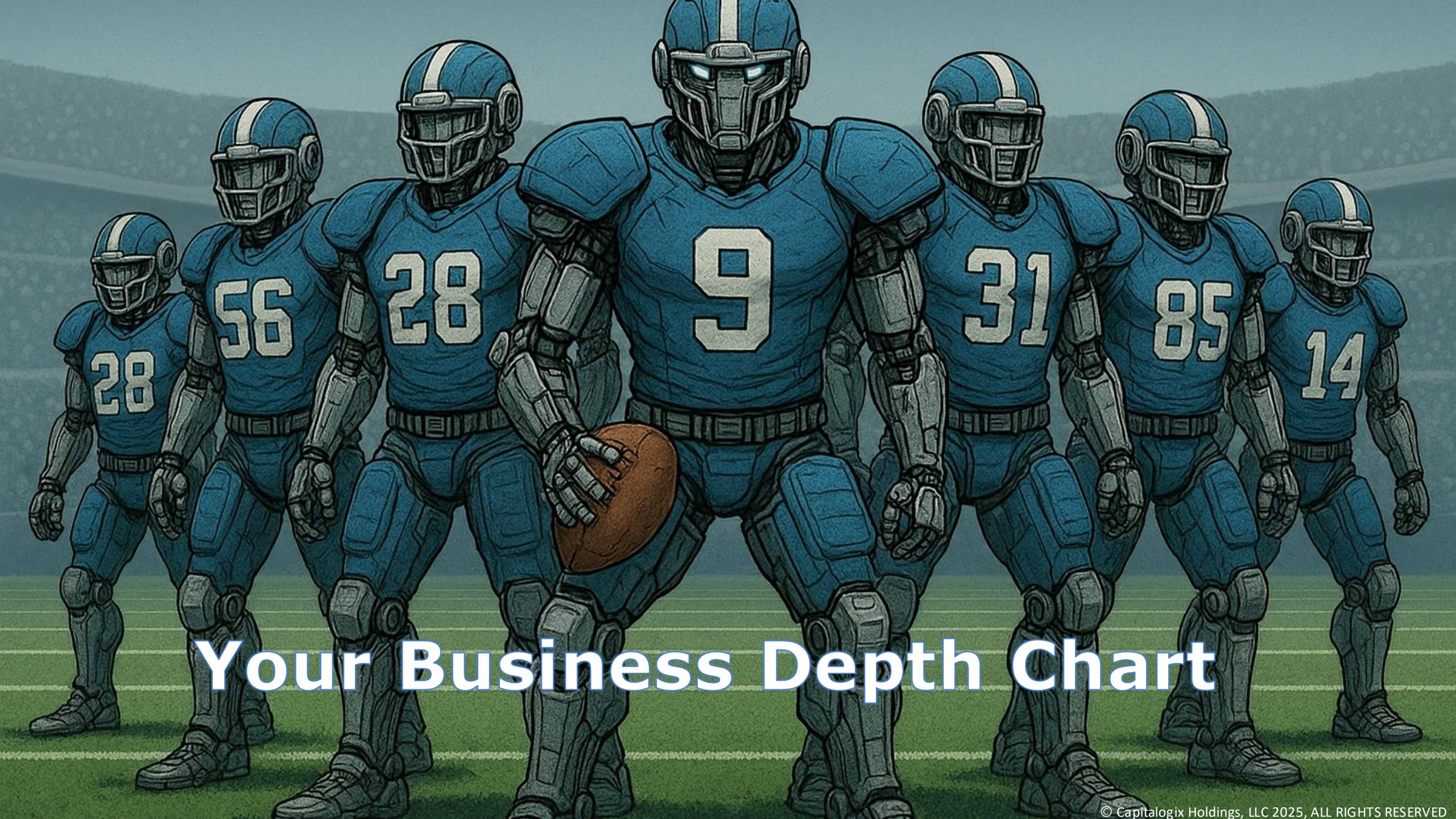

Your Business Depth Chart

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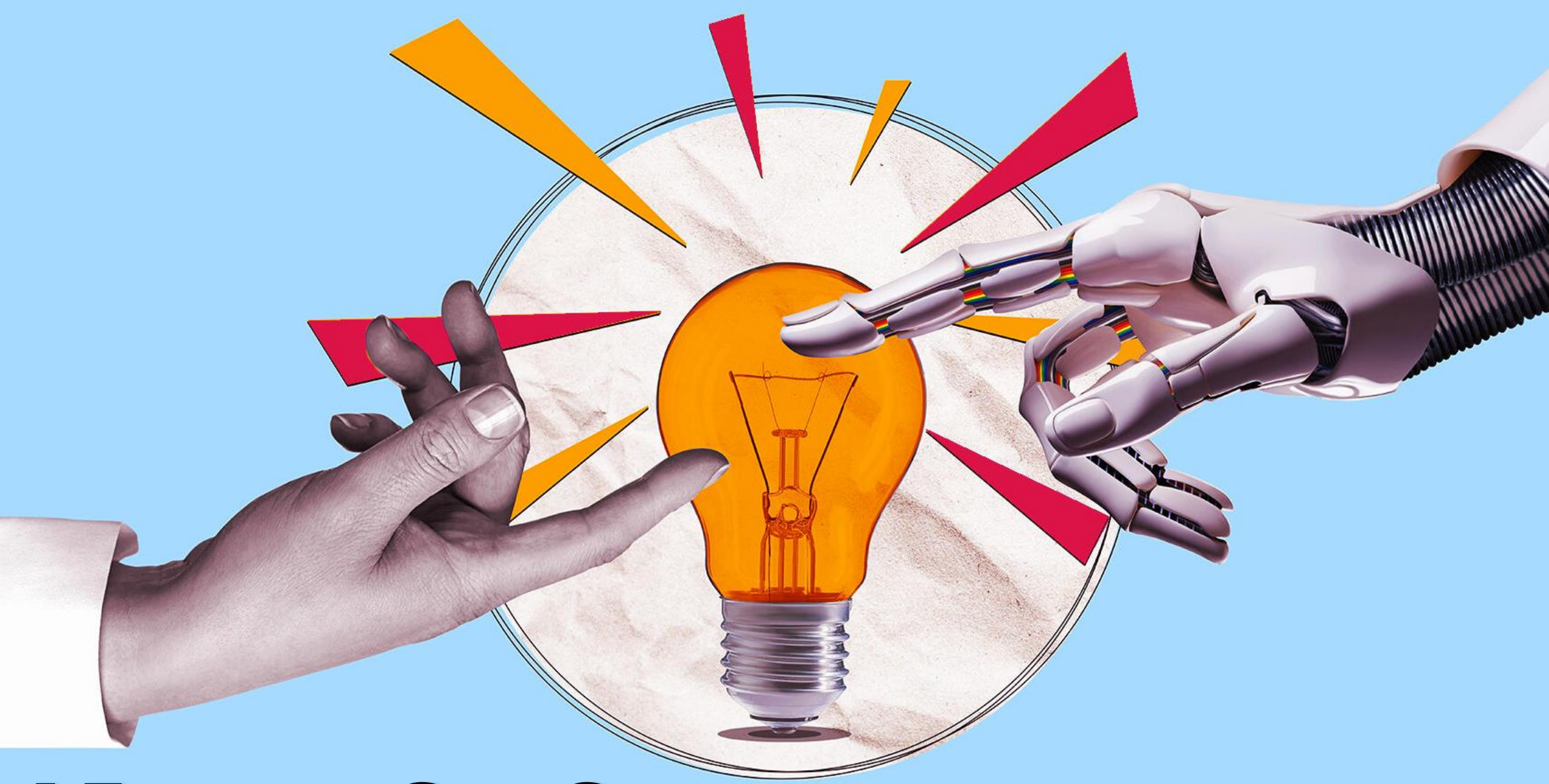

AI as a Co-Creator

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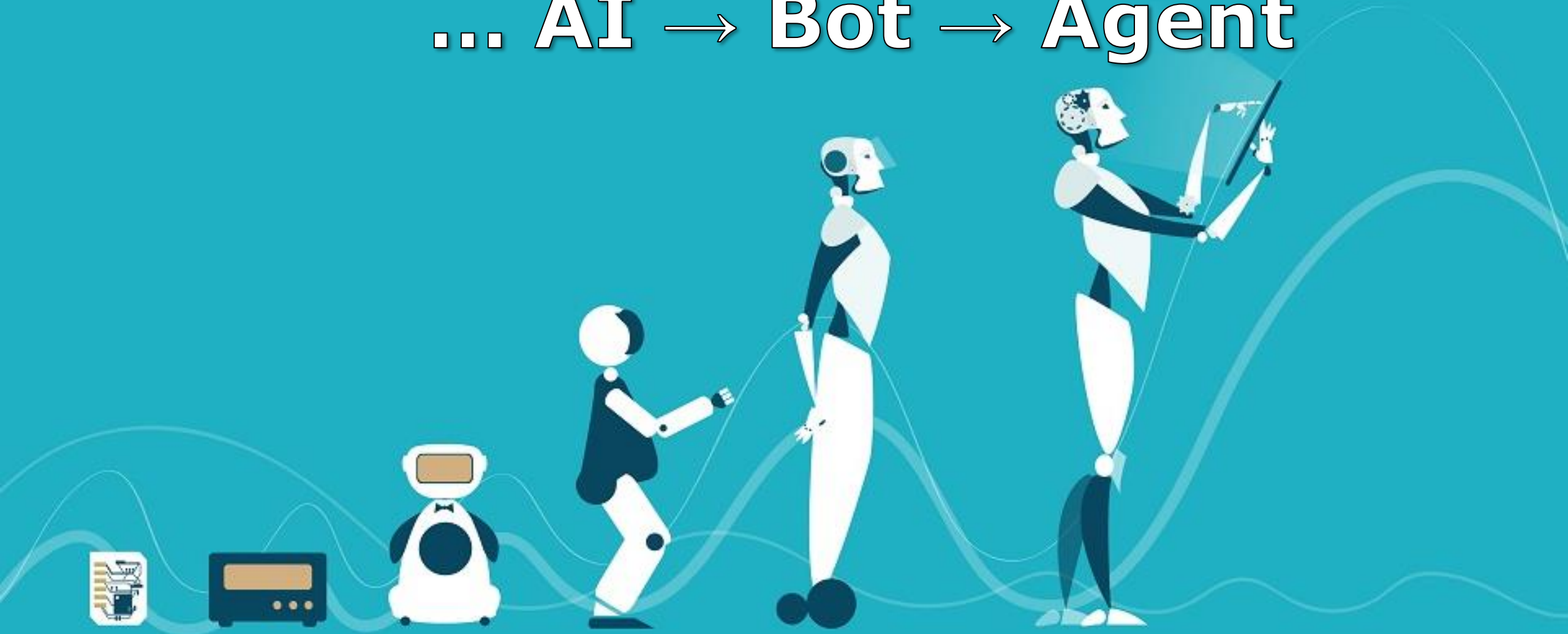
AI’s Evolution

… AI → Bot → Agent



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Just Because You Can …

Doesn’t Mean You Should

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Multi-Bot Strategies

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Orchestra

Ensemble

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Offense or Defense?

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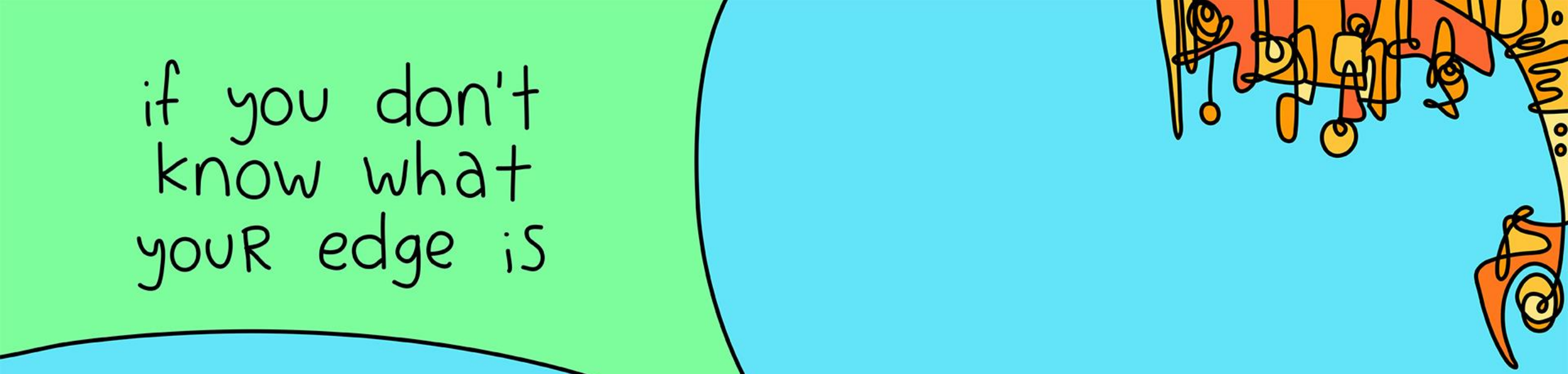
if you don't know what your edge is



you don't have one

@gapingvoid

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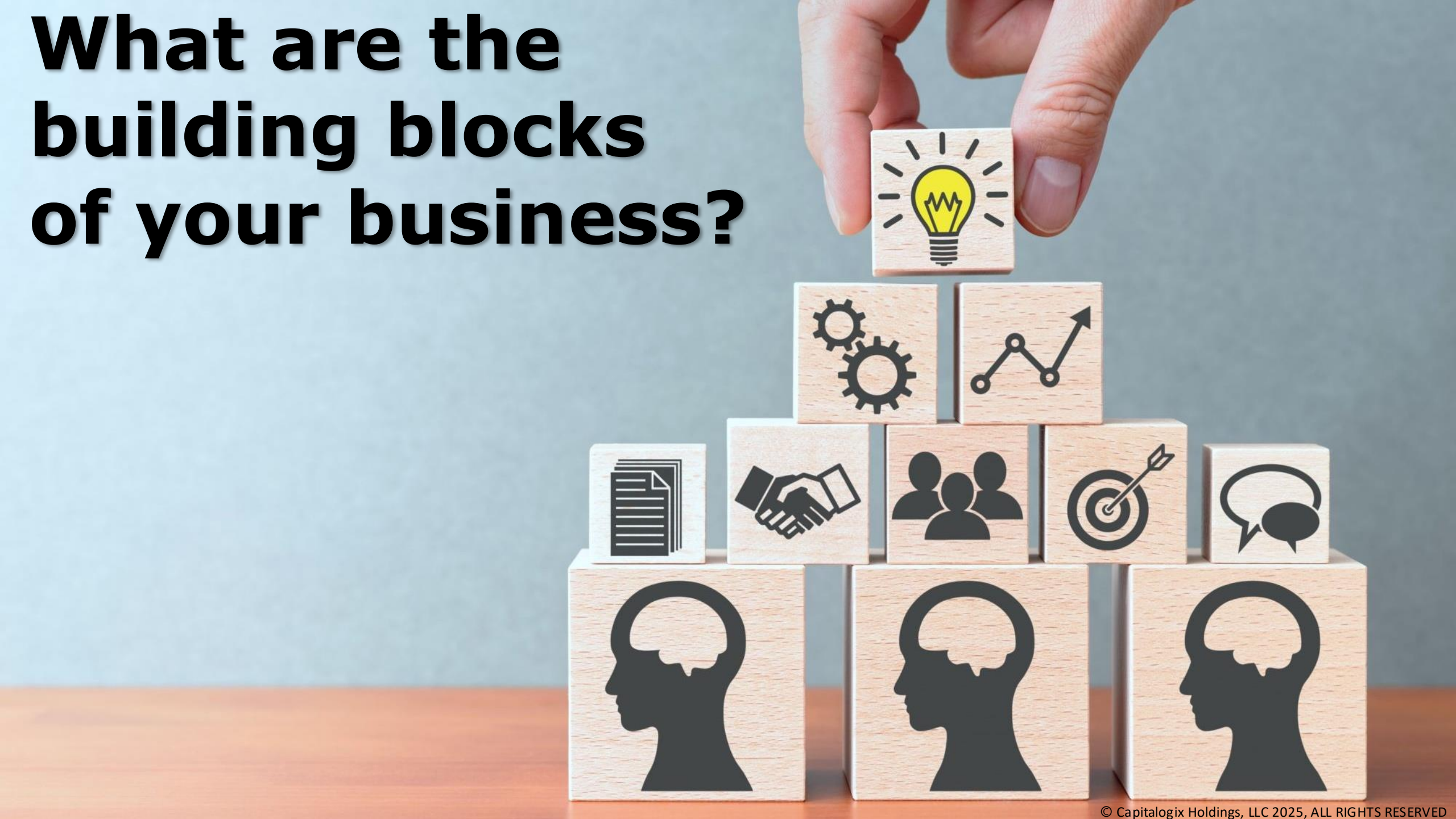
What are the building blocks of your business?



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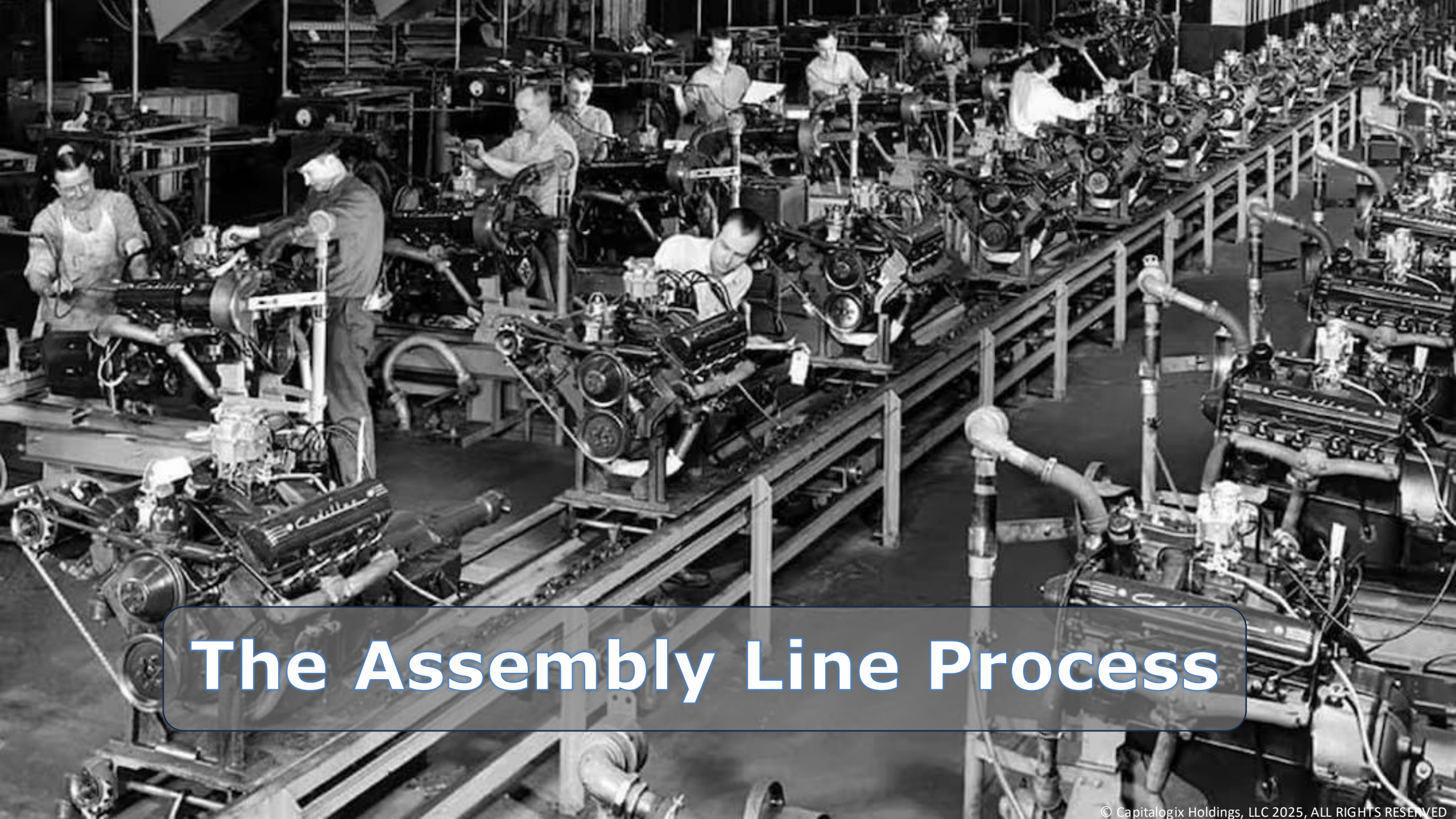

The Assembly Line Process

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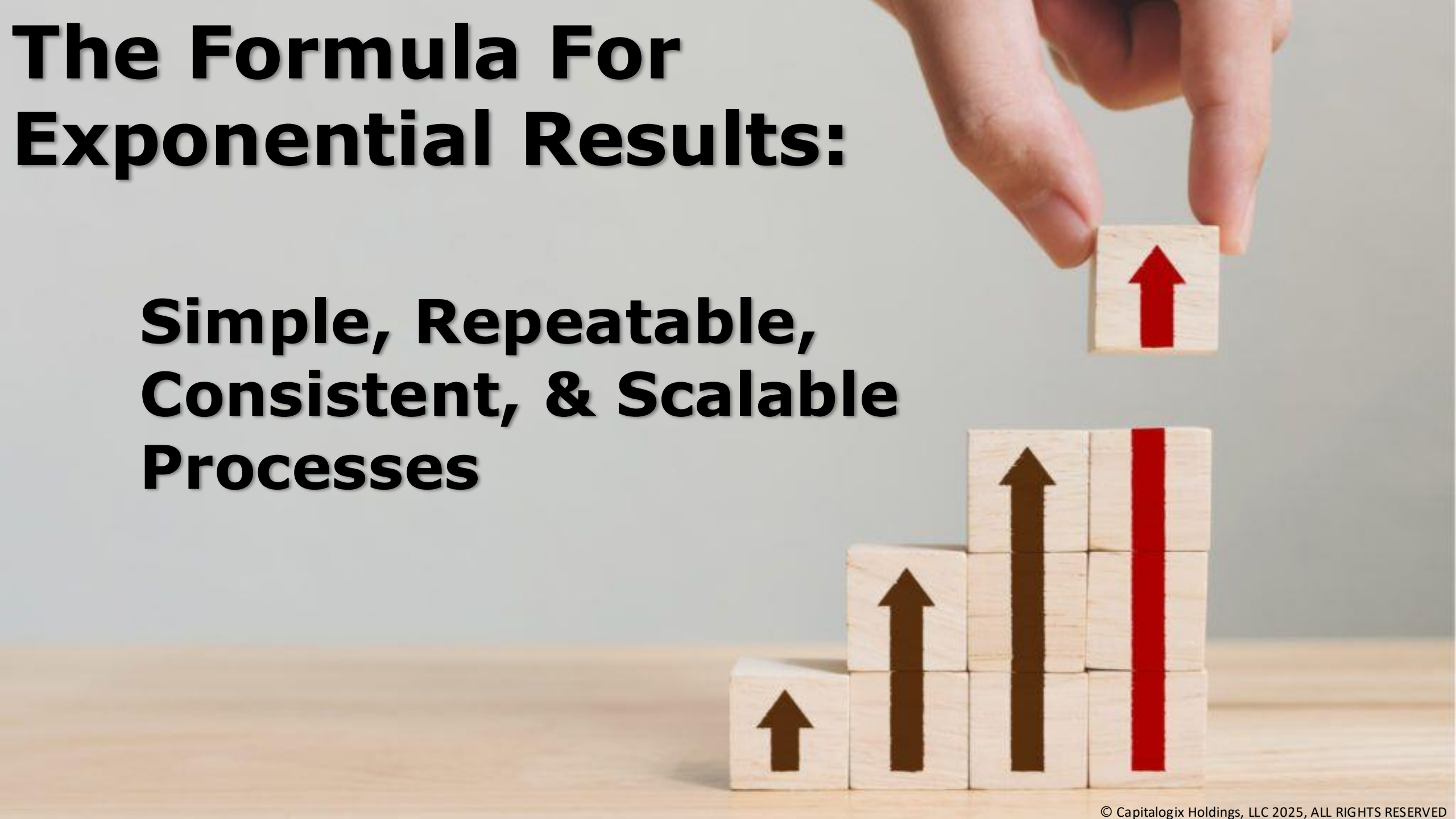
The Formula For Exponential Results:

Simple, Repeatable, Consistent, & Scalable Processes



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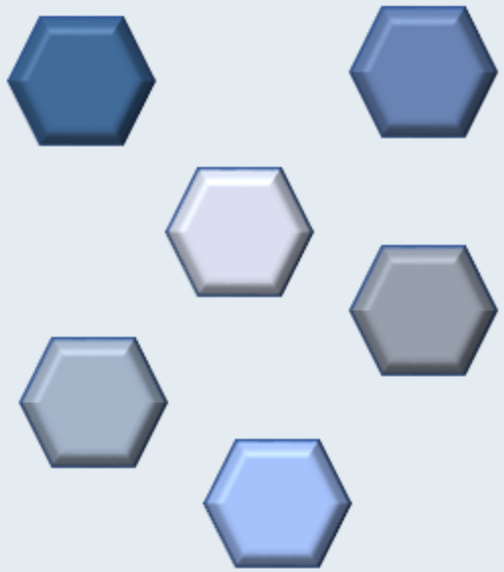
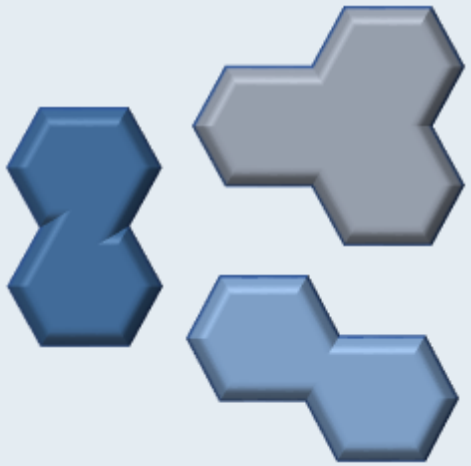
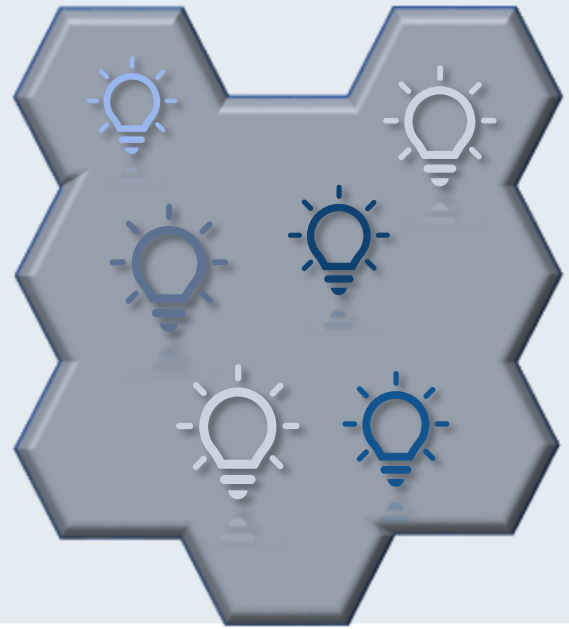
Technology Adoption Model

Capability	Prototype	Product	Platform
A fundamental building block of skill or ability that can stand alone or become the foundation for something much bigger.	A preliminary model developed by stacking or bundling different capabilities to create more opportunities, enhance the ability to perform a task, or achieve a goal.	A mature collection of capabilities packaged together to help someone achieve a specific, known result. It is designed to meet the needs of a particular audience and to be robust, reliable, and resilient.	A system or infrastructure offering a variety of capabilities that can be used by unknown individuals to achieve outcomes that the platform creator did not initially anticipate.
			

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The Building Blocks Of Effective Trading ...

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1. Opportunity Identification
2. Cash & Risk Management
3. Real-Time Market Feedback
4. Portfolio Management

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Feedback Loops & Debriefing

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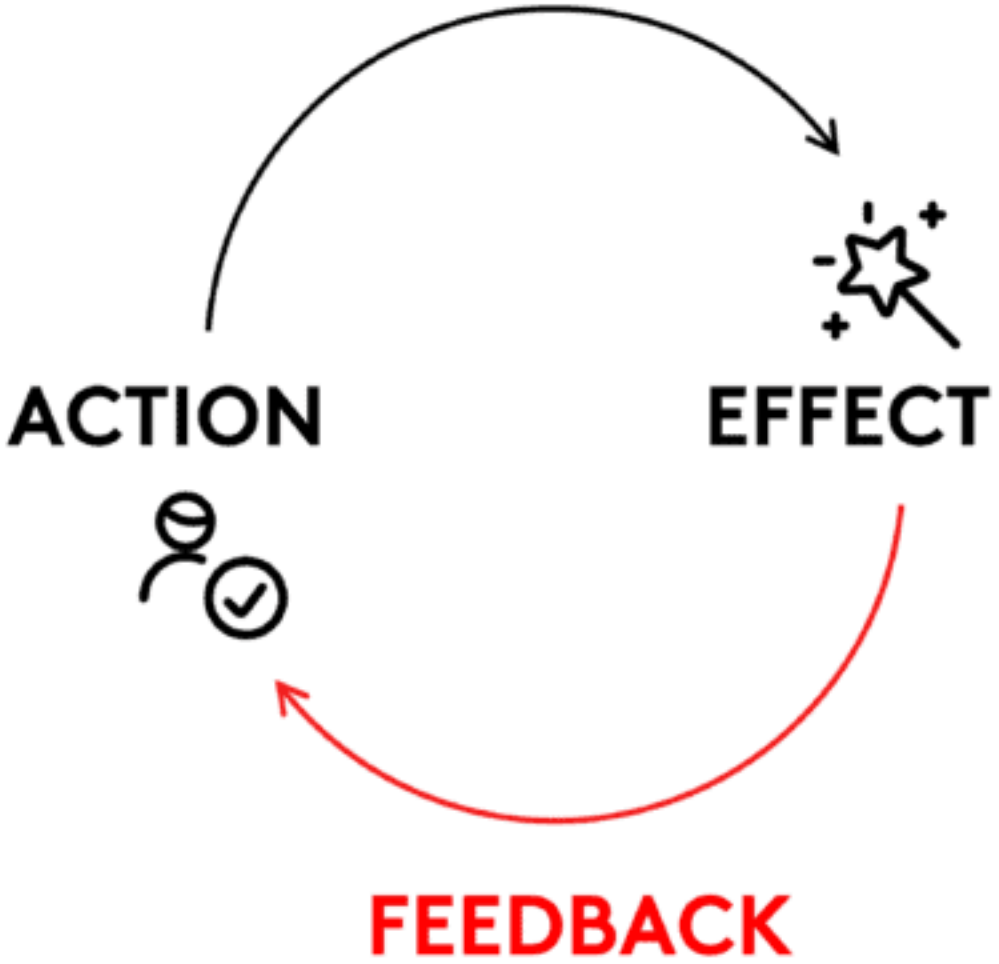
Even the Data is Valuable …



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Intellectual Property is Still Property

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Timely vs. Timeless Strategies

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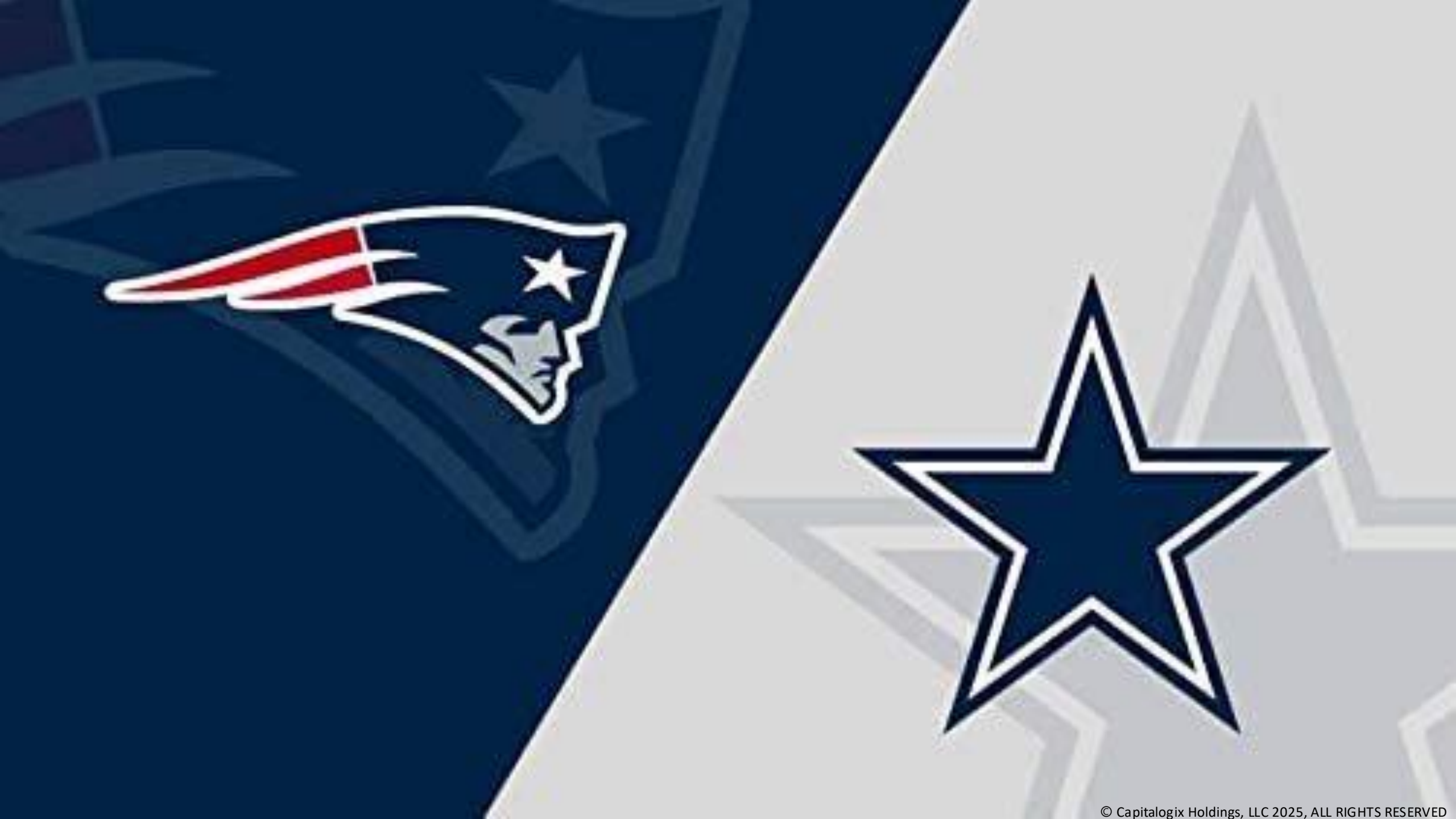

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- Run The Right Play
- Win The Game
- Thrive During A Championship Season
- Build A Long-Lasting Dynasty

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AI Is On Track To Out-Talk Humanity

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POSSIBILITY SCALE

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New Games To Win

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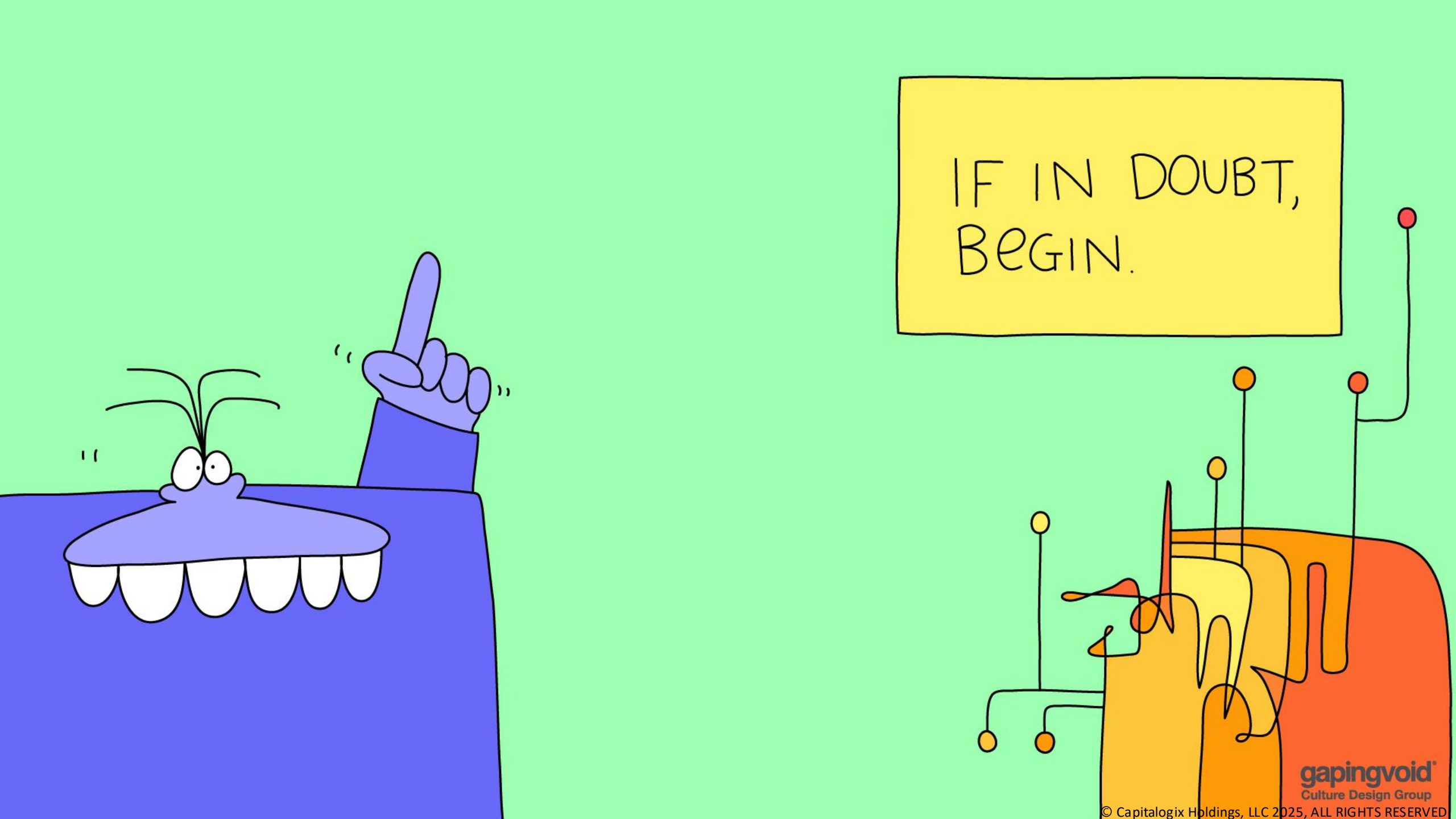

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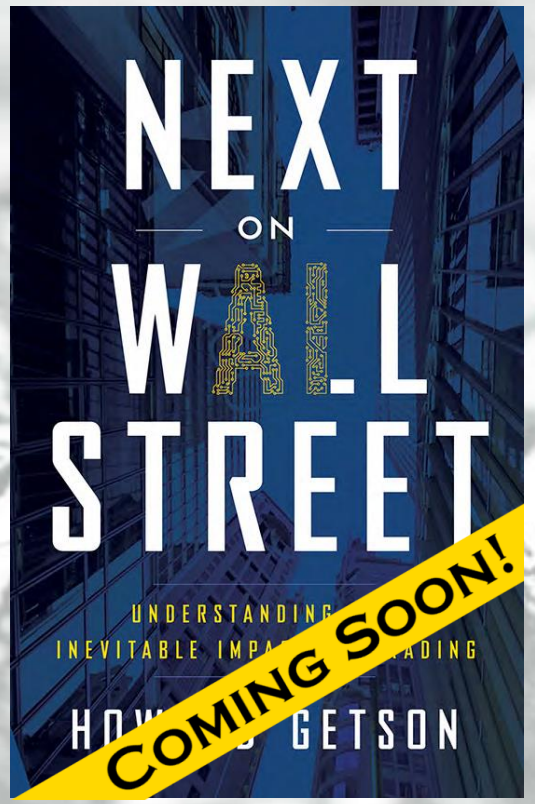
Go to bit.ly/CLGXPresentation to sign up



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It's Not Rocket Science

Some of My Favorite Prompts

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LESS IS MORE.

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Improve

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Summarize

Summarize and highlight key points

Come up with five example prompts that help me summarize information in clever and useful ways.

Come up with five good example prompts for summarizing and explaining information from different perspectives or approaches.

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Explain Like Yoda

Great Writers

- Malcolm Gladwell
- Ayn Rand
- Daniel Kahneman

Great Thinkers

- Socrates
- Elon Musk
- Charlie Munger

Fictional Characters

- Yoda
- Sherlock Holmes
- Captain Jean-Luc Picard

A Generic Avatar

- a Millennial
- a Stoic
- a Buddhist Monk

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Analyze

Analyze its tone, voice, and style.

Break down its structure, framework, and general tone.

Turn that into a prompt I can use to transform text

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Extend

What are some different perspectives?

What are 2nd and 3rd order consequences?

What Mental Models might apply?

What are potential Viral Hooks?

What is the Golden Thread and potential story arcs?

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Critique

What would the other side say?

What are potential logical flaws?

What's missing?

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Book Summary

List the Key Concepts, Insights and Learning Objectives

Of [Book] or [Concept]

For [Role] or [Purpose]

Give me a 1,000-word summary based on that

Ask questions and propose exercises to help me understand and apply these concepts

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Content Pillars

Start with a Strong Base

Summarize

Create Different Perspectives

Generate Questions

Criticize

Consider the Opposite Position

Generate an Outline

Reorganize

Highlight Different Points

Visualize

Re-Imagine

Transform

Repurpose

Store for Data Purposes

Useful Now; Valuable Later

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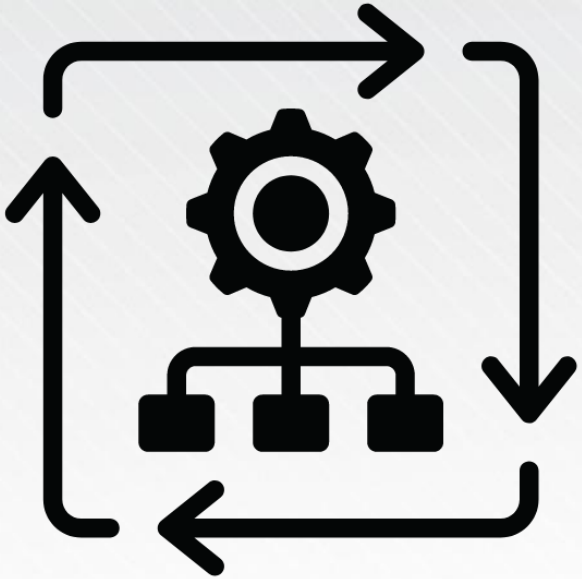
What AI Can Do …

Support

AI helping humans do their tasks better

Augment

AI performing individual steps in a complex process with human oversight



Automate

AI performing a multi-step process to free up the human to focus on something more important

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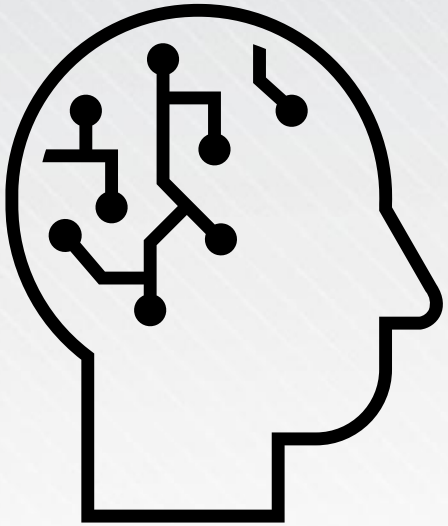
What's Coming …



Complete Autonomy

AI decides what to do, how to do it, and when to do it.

Anti-Fragile

Challenge makes it stronger. Thrives Under Stress

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