October 14, 2025

The AI Playbook

Sorting The Signal From The Noise

Howard Getson

Capitalogix®

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Capitalogix®

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

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Capitalogix®

To Help You Build Scalable Automation Playbooks

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Capitalogix®

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

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

The Train Is Leaving The Station …

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Humans Often Recognize Big Changes On The Horizon…

But Rarely Anticipate The Consequences

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Remember When Everyone Was an Internet Company?

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Don’t Get Hung Up On The Tool

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

AI Is Just The Playing Field…

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

What We'll Discuss Today

Why Playbooks Work

My Playbook

Avoiding Common Pitfalls in AI Adoption

The Bigger Picture

Getting Started

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

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

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

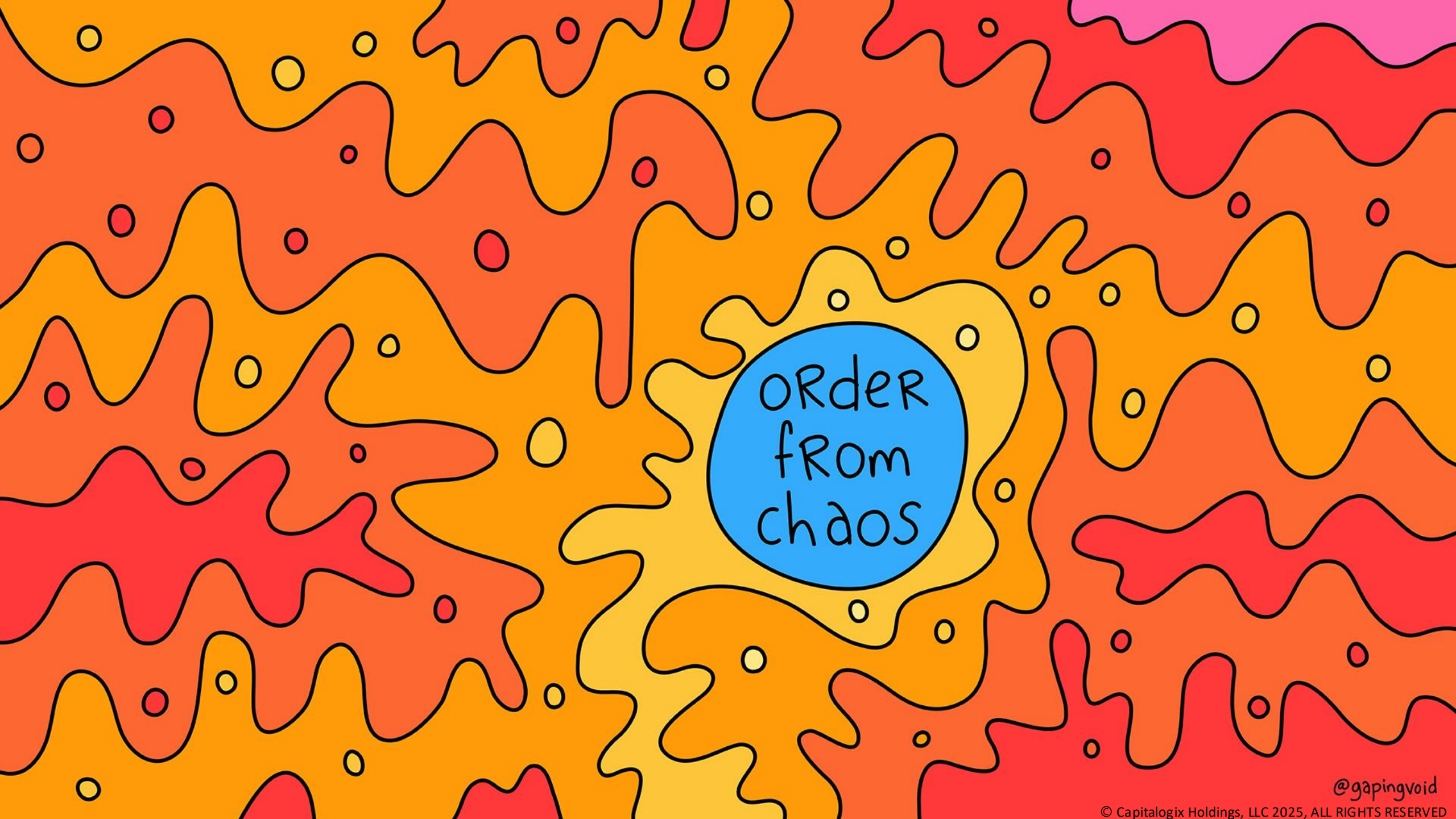
Expectation Versus Reality …

Capitalogix®

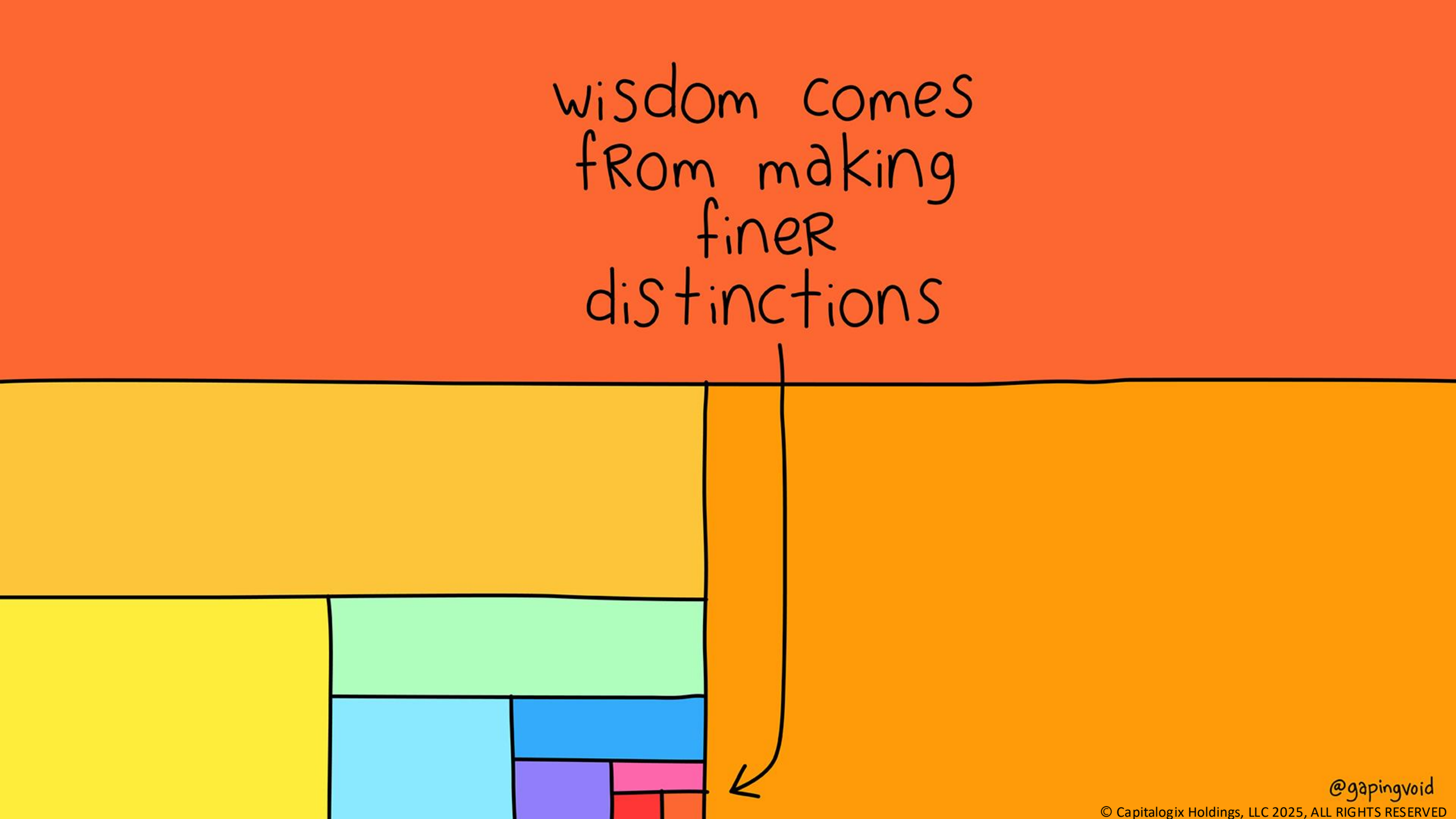
© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Understand. Challenge. Transform.

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

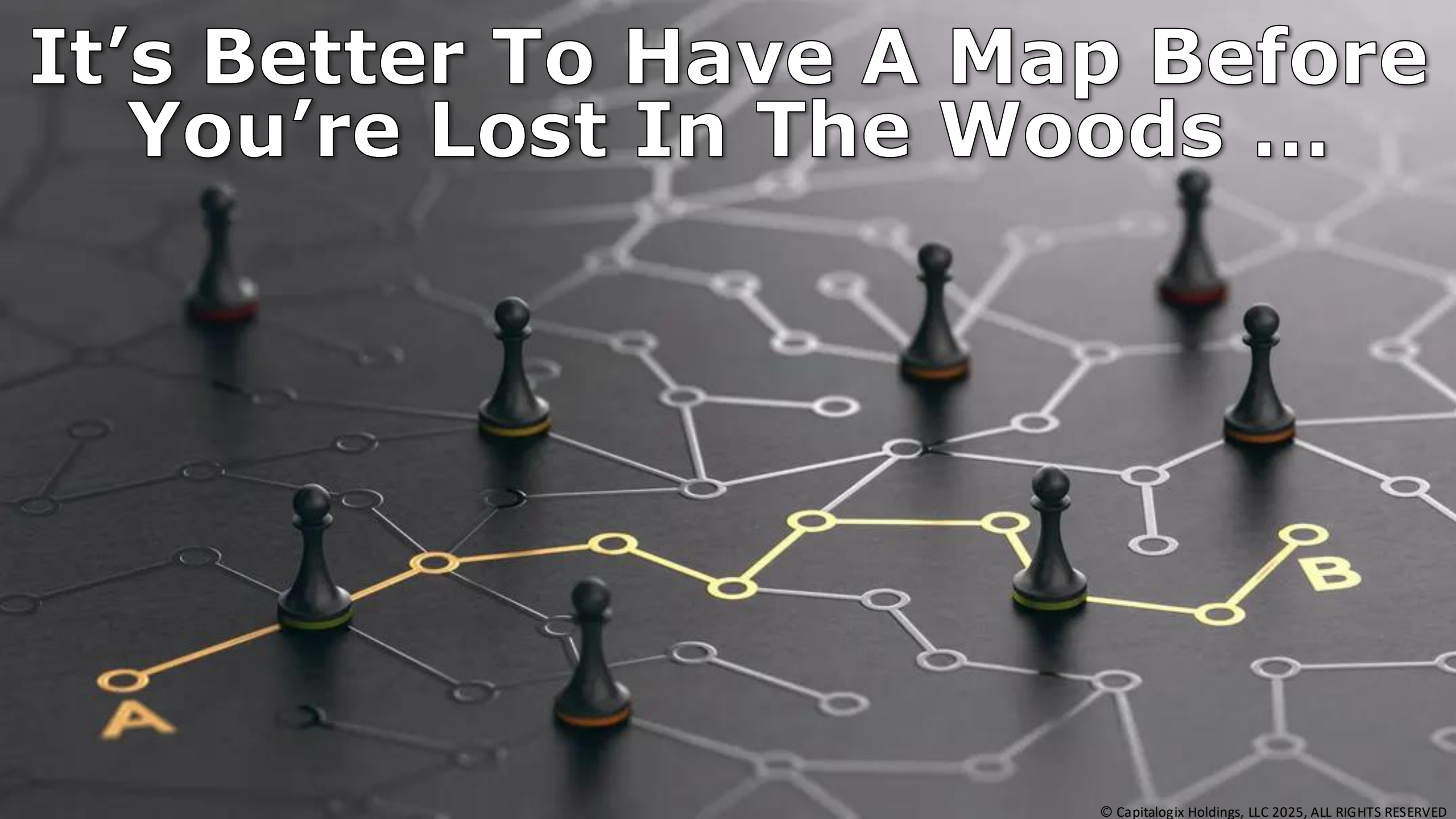


© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED



© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

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



© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Capitalogix Thought Process on Trading

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

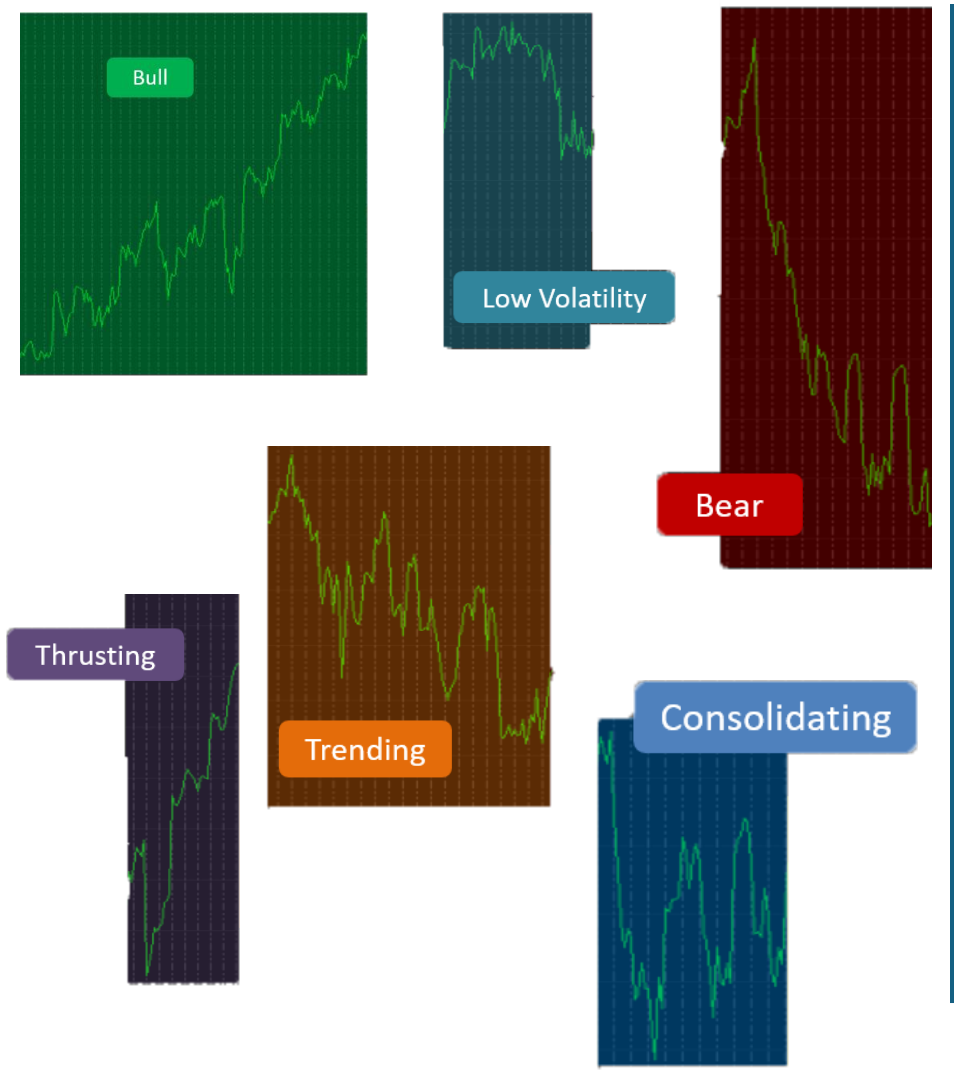
Energies
- Crude Oil
- Heating Oil
- Natural Gas
- RBOB Gasoline

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

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

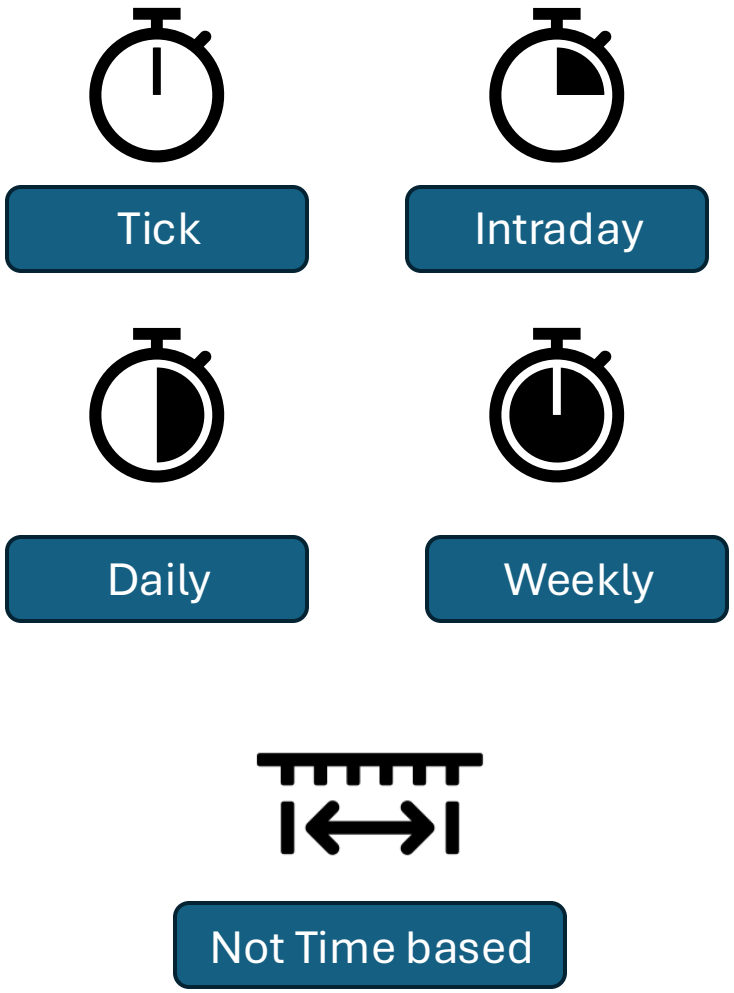
20+ Markets

How To Trade



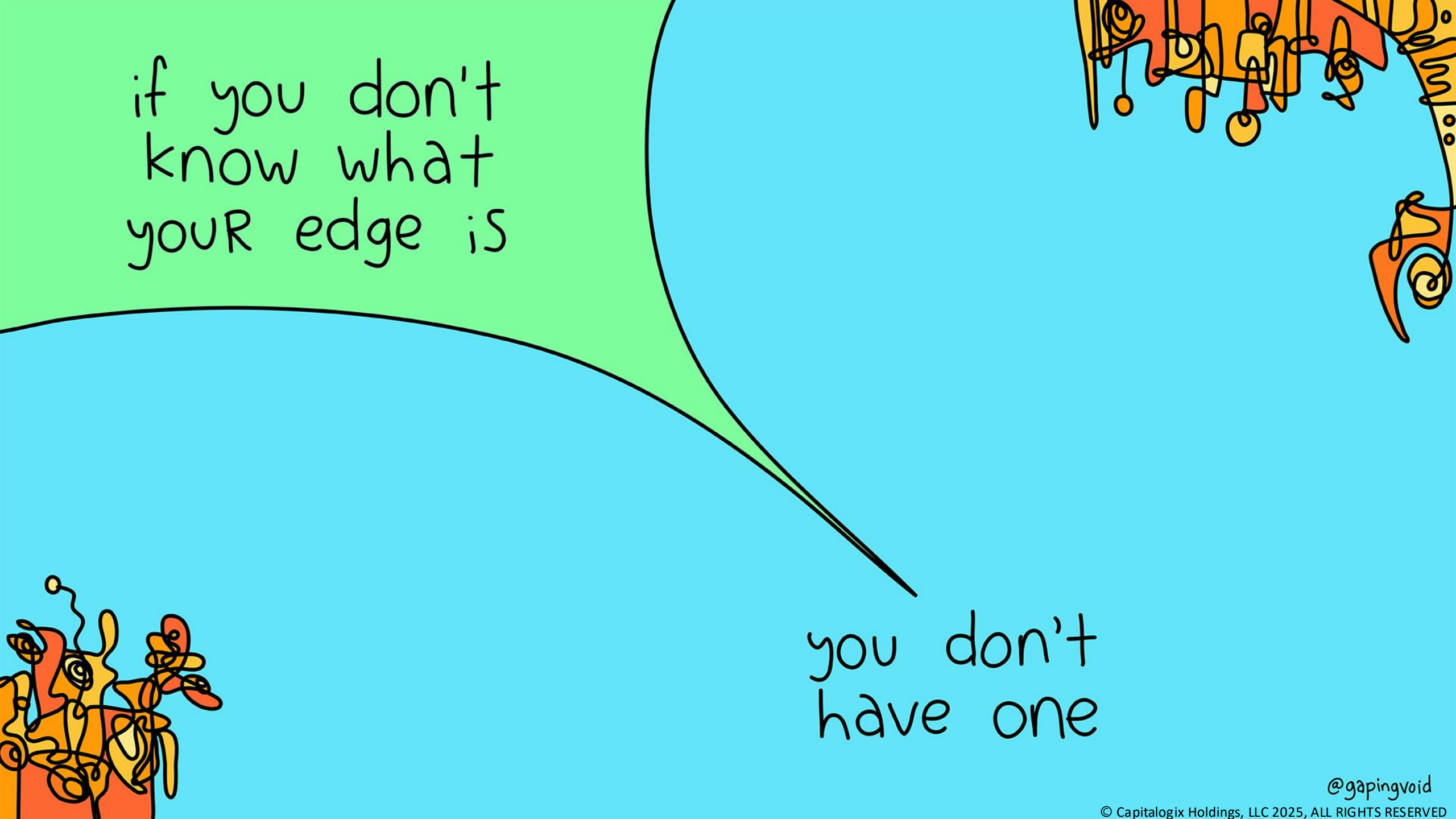
Dozens of Techniques

When To Trade



10+ Timeframes

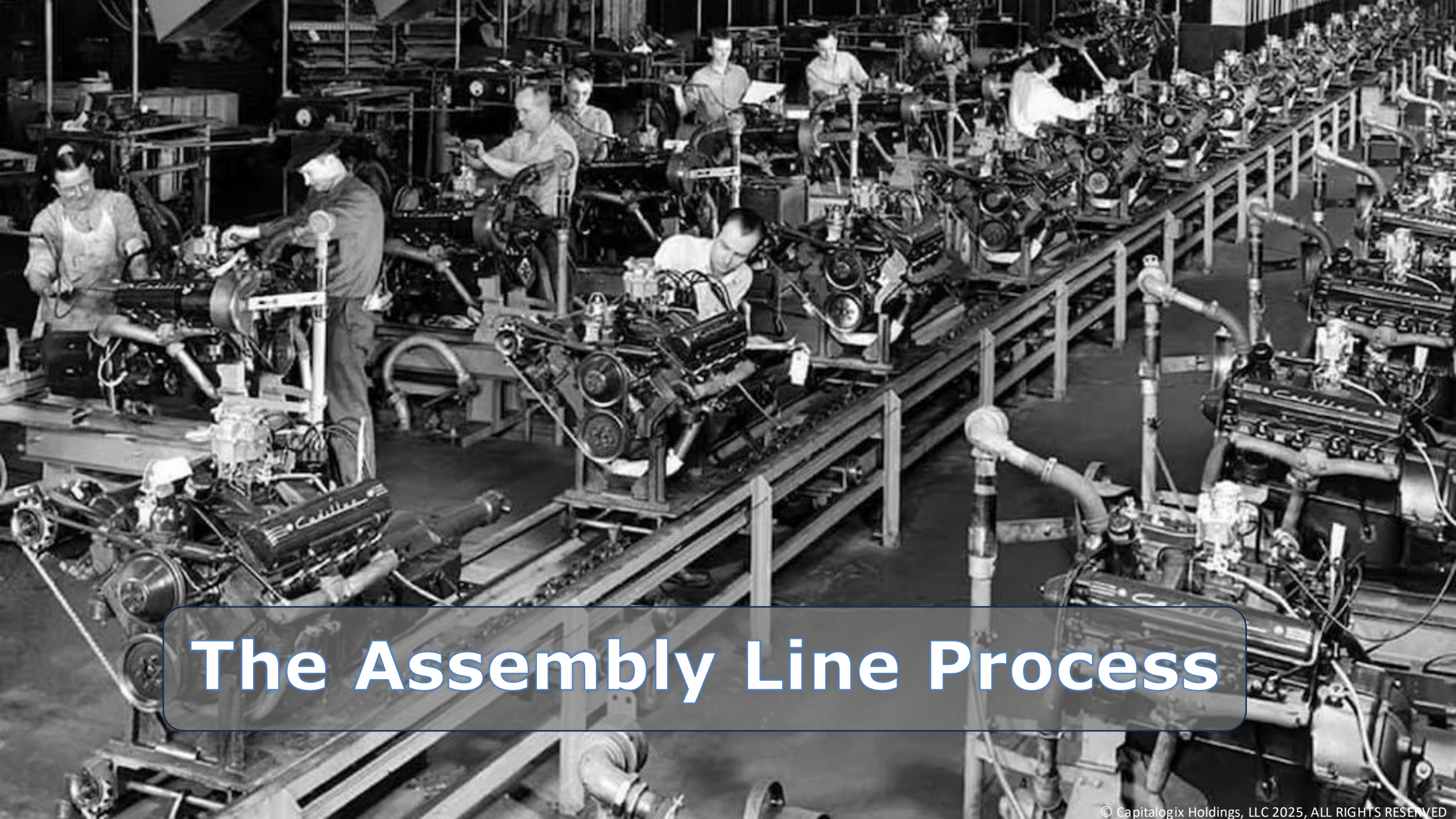
© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED



© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

What are the building blocks of your business?

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED



The Assembly Line Process

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

The Formula For Exponential Results:

Simple, Repeatable, Consistent, & Scalable Processes

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

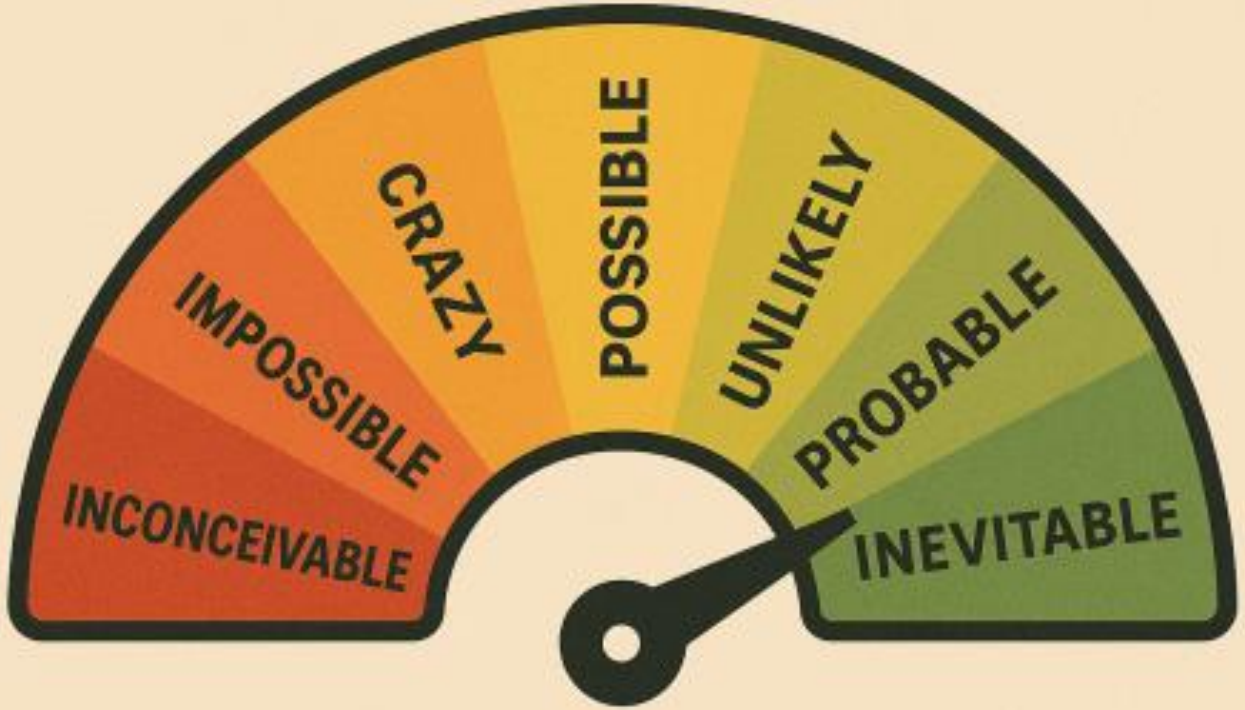
The Building Blocks Of Effective Trading …

Capitalogix®

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

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

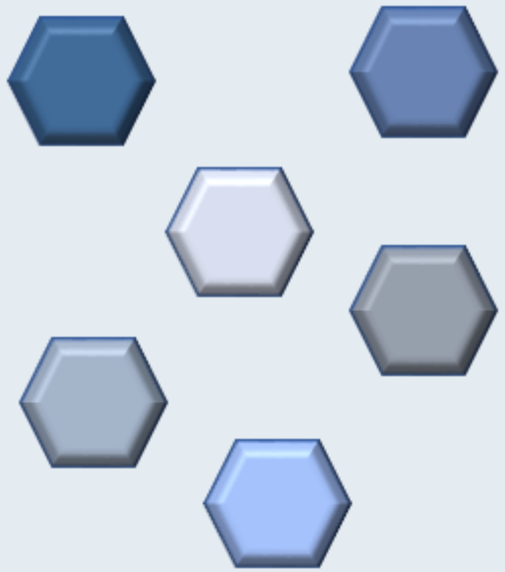
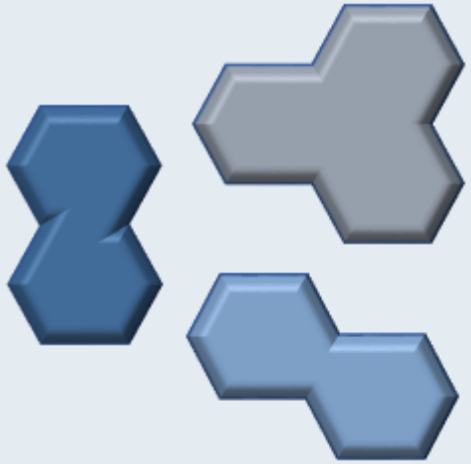
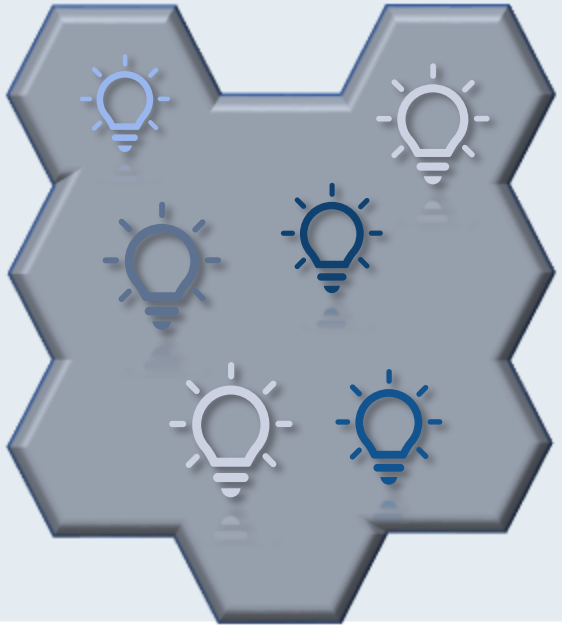
POSSIBILITY SCALE



© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Capitalogix®

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.
			

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

It’s Game Time! Now What?

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Draw Up Some Plays…

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

But You Probably Need a Playbook

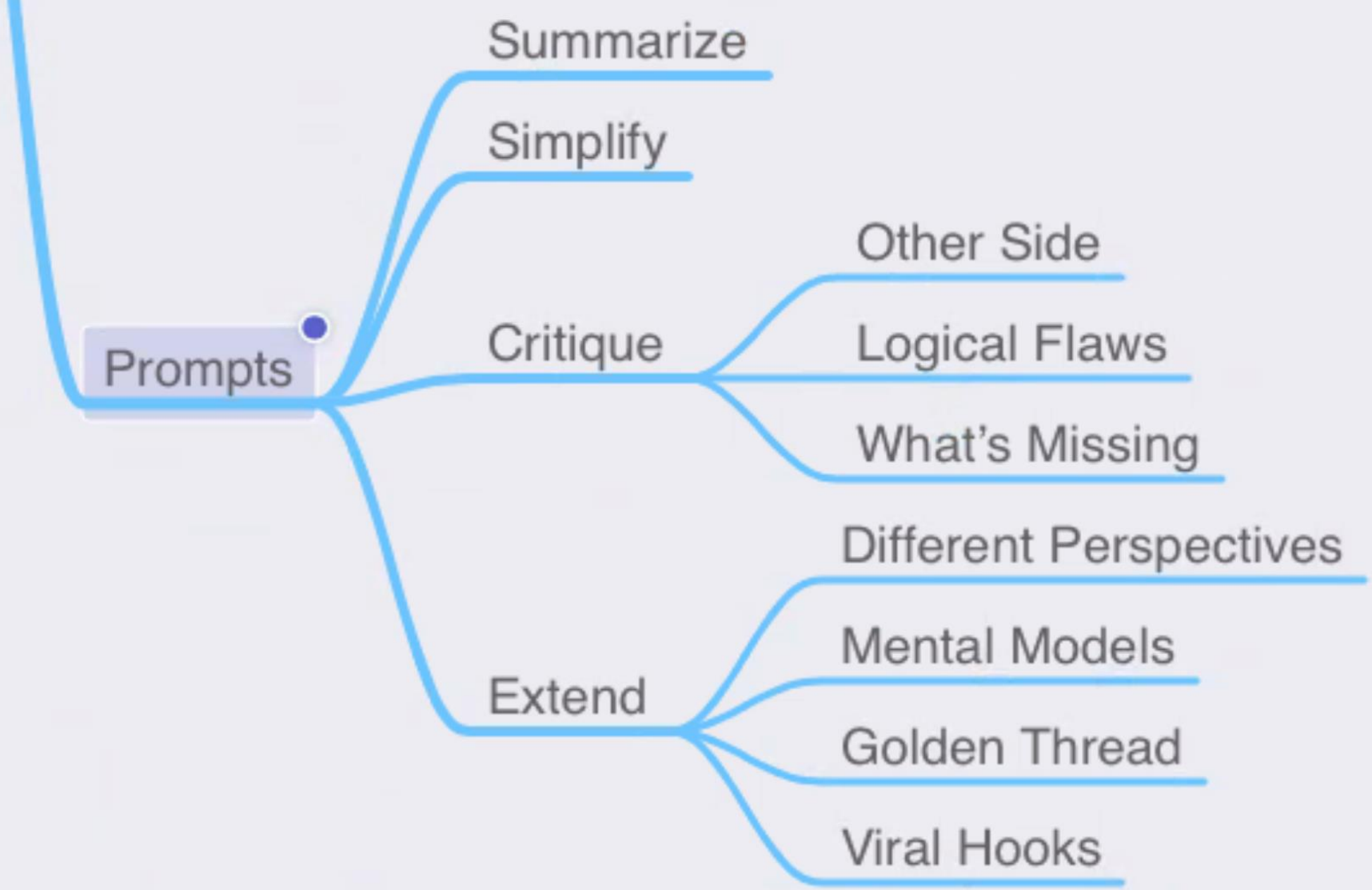
© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Think Of Your Plays As A Recipe

Capitalogix®

- Ingredients
- Order
- Intensity

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED



© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Demo: Multi-Layered Prompt

Capitalogix®

Multi Part Prompt Example:

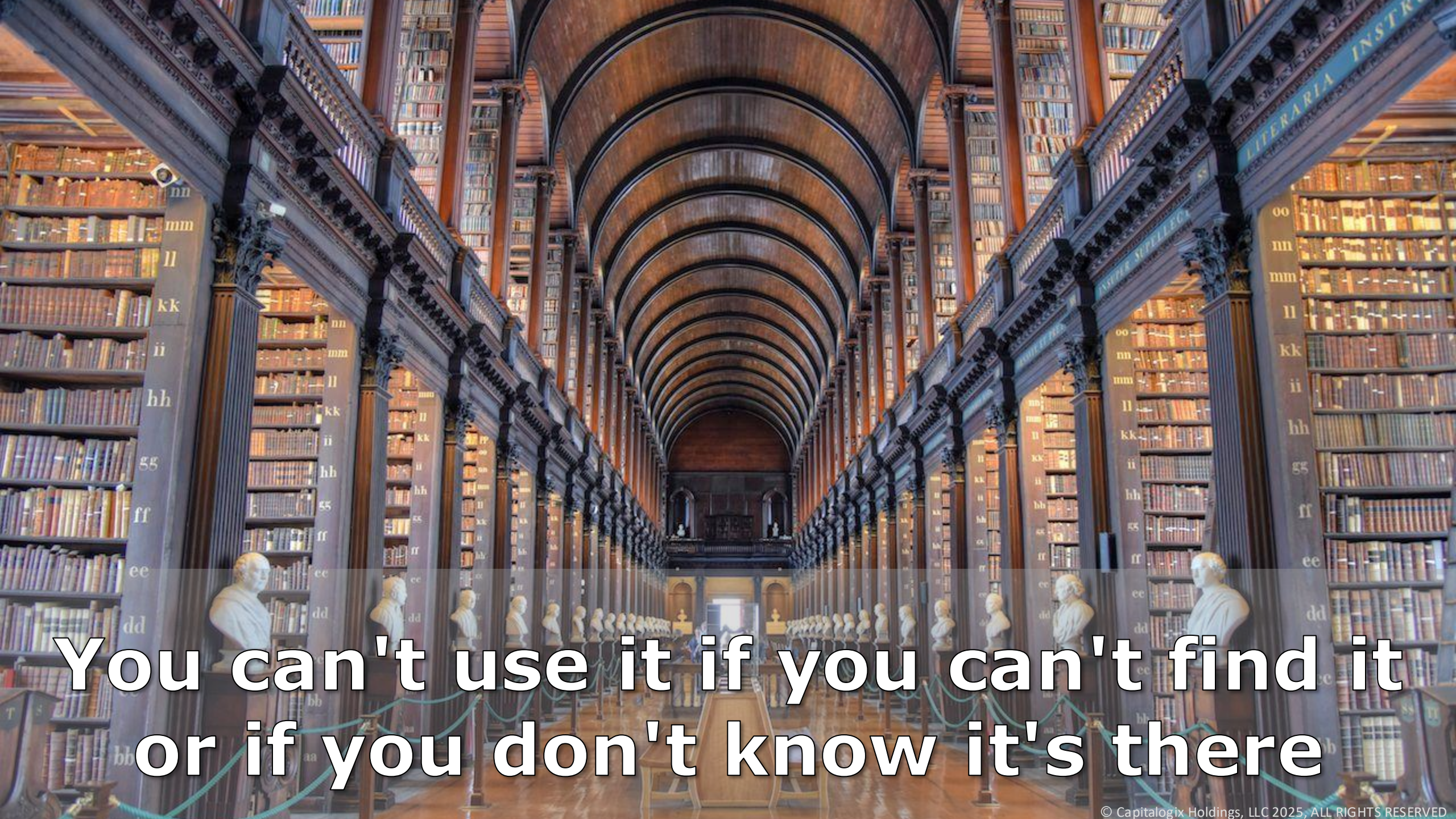
Paradoxes: Name 2–3 core tensions, why they matter, and how embracing them sharpens the message.
Models & Metaphors: Apply **3** relevant mental models; add vivid metaphors that reframe key ideas.
10-Year Look-Ahead: What will seem obvious in a decade but is missed now?
Cross-Perspectives: Bring **3 experts** (1–2 quotes/examples each). Explain *why chosen* and *what it adds*.
Steelman: What would a smart critic argue to change the conclusion?

Other Examples:
Act as my editorial review board
Act as my Board of Advisors
Act as my ideal customer

– Full Prompt Examples are in the Appendix

Confidential Information - Do Not Disclose

© Capitalogix Holdings, LLC 2025, All Rights Reserved



© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Knowledge Management is Vital

Capitalogix®

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

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Business is Like a Team Sport

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

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

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

What Football Programs Get Right

Capitalogix®

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

And Don't Forget …

- Games
- Scrimmages
- Cheerleaders
- Fans
- Fun

For More, Check Out My Article On This

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Your Business Depth Chart Could be Deeper ...

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

AI’s Evolution

… AI → Bot → Agent

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

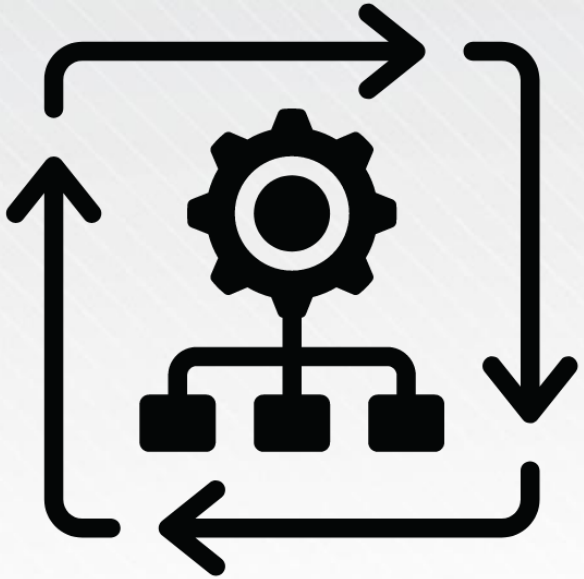
What AI Can Do …

Support

AI helping humans do their tasks better

Augment

AI performing individual steps in a complex process with human oversight

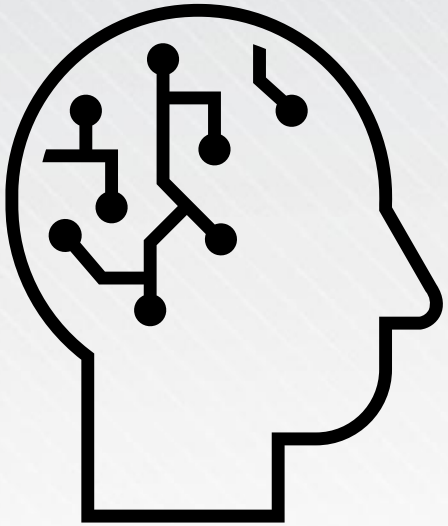


Automate

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

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

What’s Coming …



Complete Autonomy

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

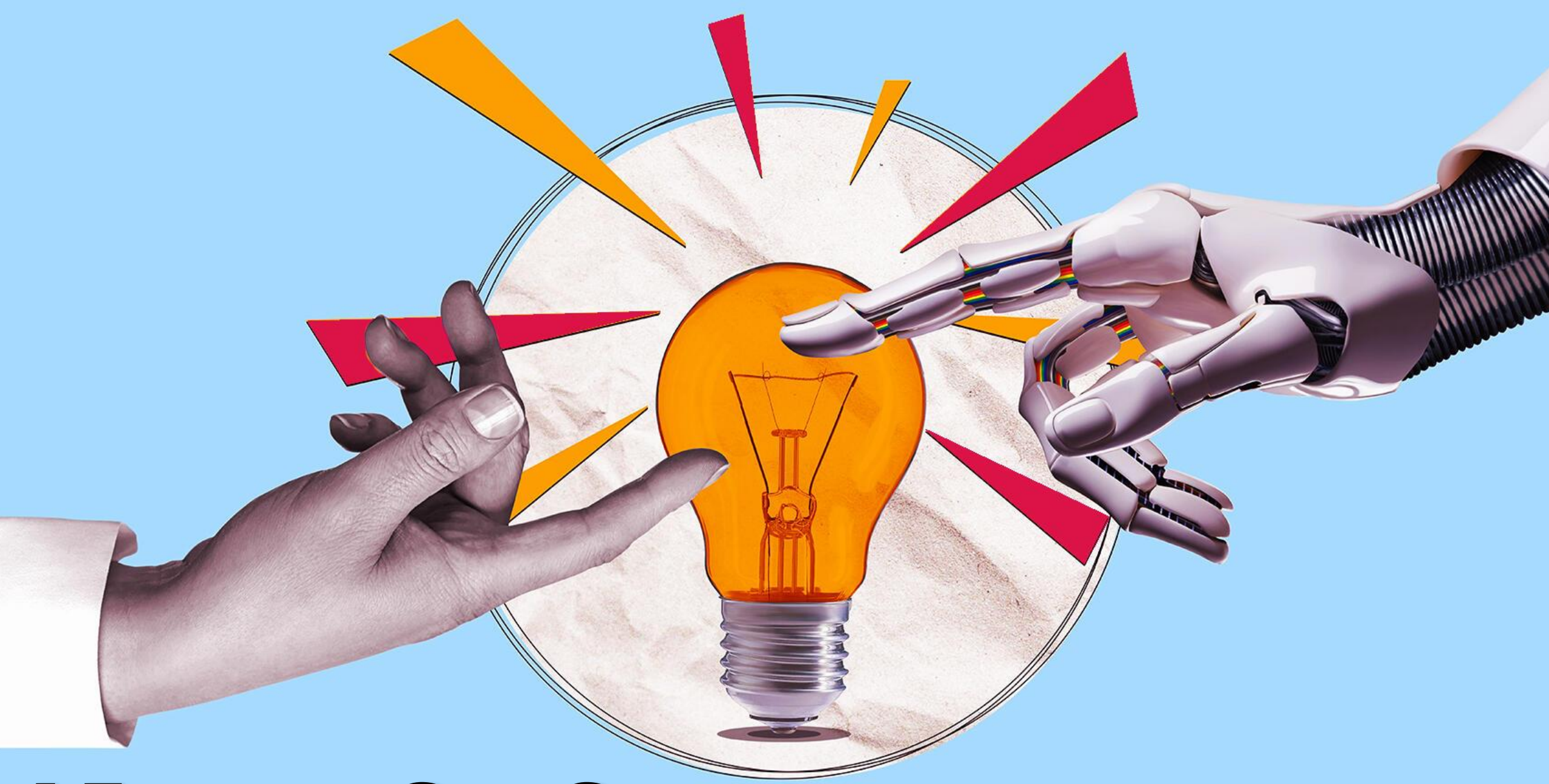
Anti-Fragile

Challenge makes it stronger. Thrives Under Stress

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

AI as a Teammate

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED



AI as a Co-Creator

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Example Avatars

Capitalogix®

Researcher/Scientist

- Takeaways, Nuance, & deep dives
- Connecting threads and finding the golden thread
- E.g, Richard Feynman, 4-Level Analyst, Malcolm Gladwell

Editor/Storyteller

- ”Help me understand …”
- “Clean Up …”
- E.g. Hook architect focused on going viral, Newsroom editor in chief, Chief Marketing Officer

AI Agent

- Think about how to improve itself and its outputs
- Store data for future projects
- E.g. a future version of ChatGPT

Confidential Information - Do Not Disclose

© Capitalogix Holdings, LLC 2025, All Rights Reserved

Just Because You Can …

Doesn’t Mean You Should

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Multi-Bot Strategies

Capitalogix®

Orchestra

Ensemble

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Offense or Defense?

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Who is Leading Your Team?

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

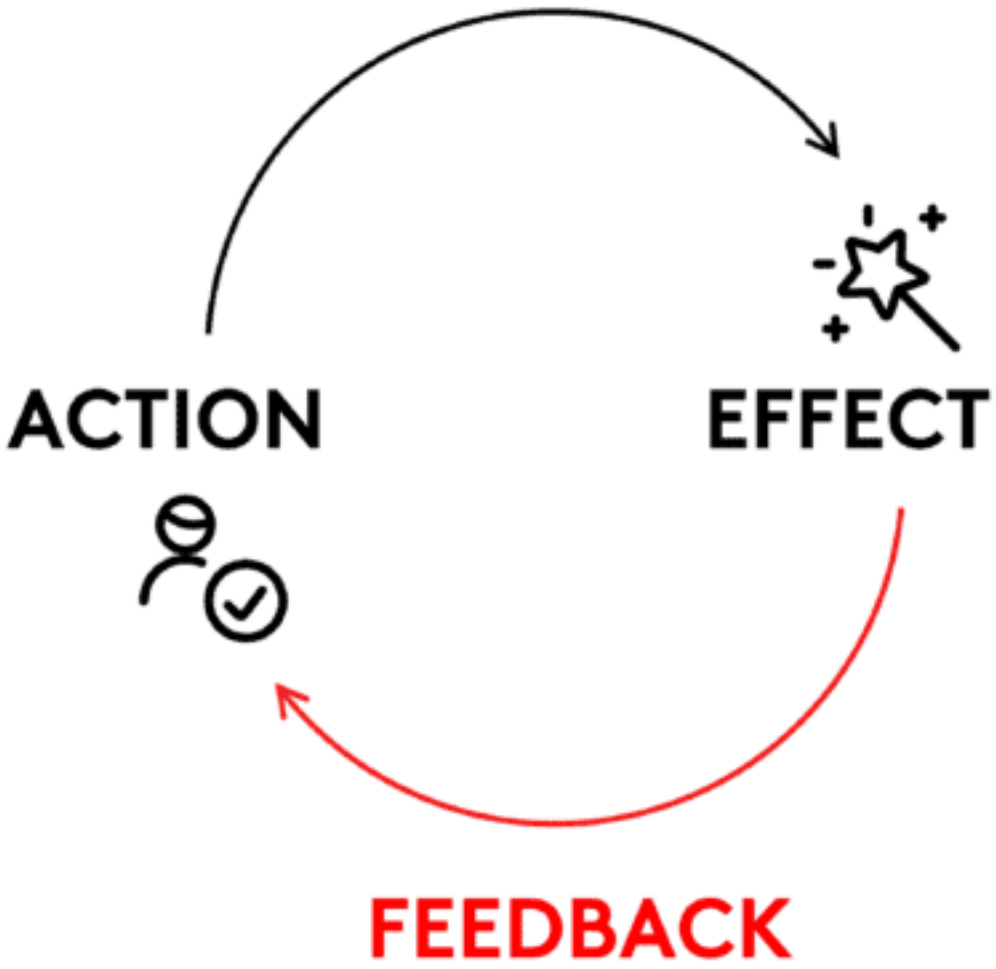
© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Feedback Loops & Debriefing

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Even the Data is Valuable …



© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Intellectual Property is Still Property

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

One Playbook isn’t Enough …

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

© Capitalogix Holdings, LLC 2025. ALL RIGHTS RESERVED

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

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Timely vs. Timeless Strategies

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Are You Playing The Right Game?

Capitalogix®

1. Not Usable
2. Usable, But No Obvious Benefit
3. Nice to Have; User Appreciates, Not Strategic
4. Should Have; Strategic to User, Not Unique
5. Must have; Strategic to User and Unique

Via Geoffrey Moore's Crossing The Chasm

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

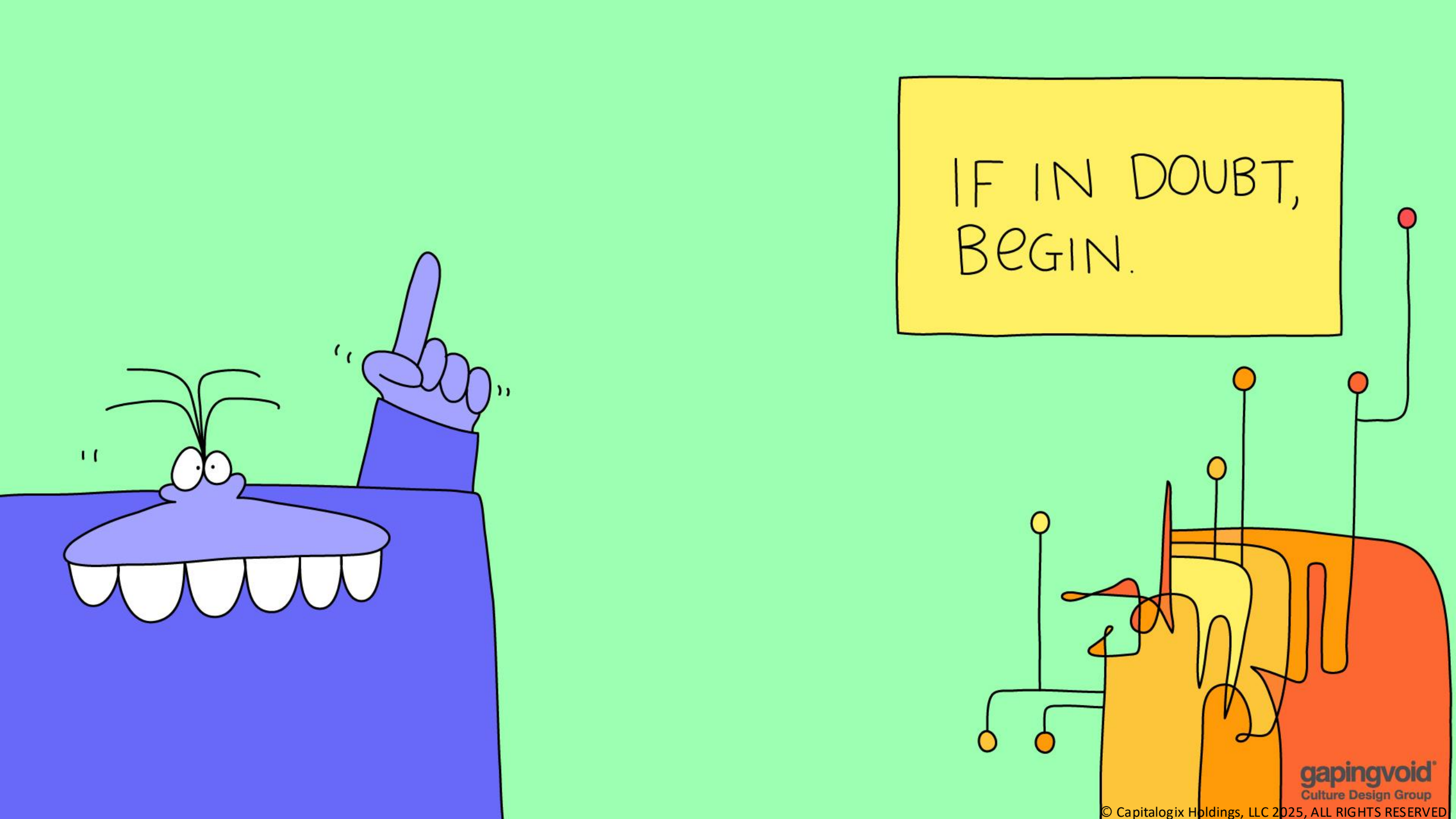
The Difference Between Good and Great

Is Infinitesimal

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

New Games To Win

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED



© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

It’s Not Rocket Science

Some of My Favorite Prompts

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

My Personal Content Process

Aggregate

Flipboard

feedly

Filter

Readwise

Transform

Voilà

Merlin

perplexity

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

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** – Text Macros

Paste or **ClipMate** – Clipboard Manager

MeetGeek or **Otter.AI** or **WisprFlow or Granola** – 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 or **Notion** or **Readwise** – External Brains

Zapier and **ITTT** – Tool Integration

Systematization Doesn't Mean It Needs To Be AI

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

$$< = >$$

LESS IS MORE.

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Improve

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

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.

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

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

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

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

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

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?

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Critique

What would the other side say?

What are potential logical flaws?

What’s missing?

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

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

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Blog Post

Start by asking me a few key questions about what I want to write.

Once you understand my goals for the piece, offer to write it for me in Chat. You might offer to write long pieces (ex. blog posts or essays) section-by-section.

After you've written the draft, you can offer to explain how I could use Generate Draft to get better results. Only do this if my document content is empty.

Ask questions one at a time. When appropriate, remind me that I can attach files & URLs to answer your questions. Keep your responses short.

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

Multi-Layered Analysis

Task: Analyze the article with 4 layers and deliver executive-ready insights.

Layers (use bold section headers):

Paradoxes: Name 2–3 core tensions, why they matter, and how embracing them sharpens the message.

Models & Metaphors: Apply **3** relevant mental models; add vivid metaphors that reframe key ideas.

10-Year Look-Ahead: What will seem obvious in a decade but is missed now? Note implications for **tech, society, culture, strategy**.

Cross-Perspectives: Bring **3 experts** (1–2 quotes/examples each). Explain *why chosen* and *what it adds*.

Steelman: What would a smart critic argue to change the conclusion?

Exec Wrap (ROA): *Risks, Opportunities, Actions*—bullet points, plain language, urgent and specific.

Formatting: Bold section titles, bullets, *italics for key lines*, space after punctuation, no jargon.

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED

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

© Capitalogix Holdings, LLC 2025, ALL RIGHTS RESERVED