A Function Paper from GRAIL

# What does an AI-augmented management team look like?

**Management team**

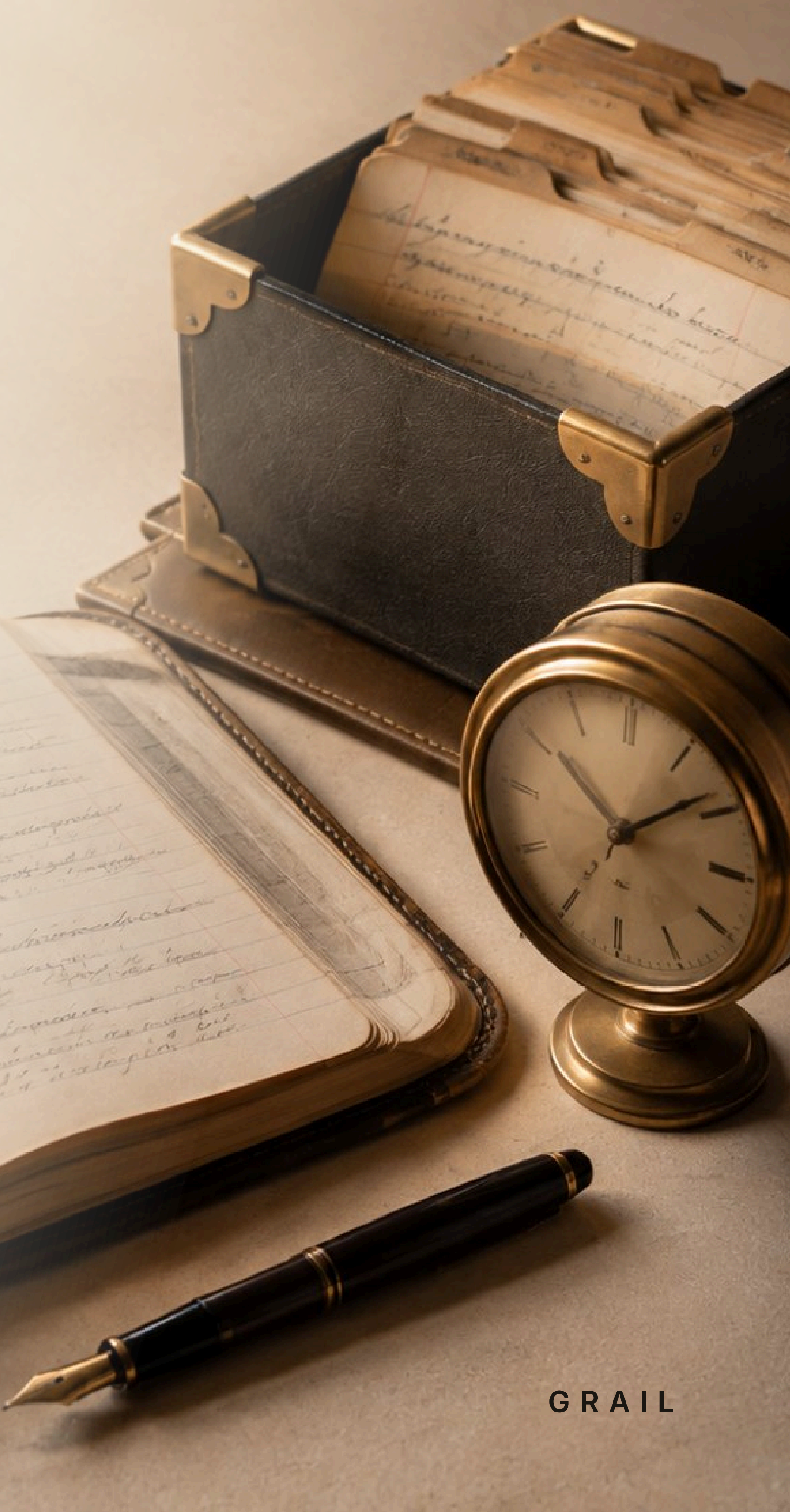
Where the CEO office and management team are heading in the next two to three years, and how better preparation can change the quality of company decisions.

*"Prepare the question deeply. Test the possible futures. Keep the call with the people who carry it."*

01 Which decisions in your company still depend on whoever speaks loudest?

02 Are your leaders still using AI only to draft emails?

03 Which big bet in your company has only one forecast?



# WHAT DOES AN AI-AUGMENTED MANAGEMENT TEAM LOOK LIKE?

*Where the CEO office and management team are heading in the next two to three years, and how better preparation can change the quality of company decisions.*

A management team exists to think deeply about the few questions that decide the company's direction, then turn that thinking into action. Reports, meetings, pre-reads, and follow-up should prepare those moments. **The change that matters is the quality of what comes out of the room.** Each major choice can arrive already tested, argued with, and placed beside credible alternatives.

## THE CEO'S 2028 DECISION RHYTHM

**01**
### THE QUESTION
the decision to be made, the current diagnosis

›

**02**
### THE PREPARATION
challenges the logic, identifies the assumptions that need proof

›

**03**
### THE SCENARIOS
test a forecast under several conditions

›

**04**
### THE DECISION
chooses which options deserve further study

›

**05**
### THE INITIATIVE
the accepted initiative carries the case behind it

*Prepare the question deeply. Test the possible futures. Keep the call with the people who carry it.*

*GRAIL's view of where executive management is heading. A position, not a survey.*

THE FUNCTION TODAY

# The CEO is the manual *integration point*.

Sales, operations, and finance enter the management meeting with different views. Before deciding, the CEO must identify shared facts, conflicting assumptions, and material gaps.

The CEO office in a EUR 50 to 500 million company is a CEO or managing director, an executive assistant, sometimes a chief of staff or strategy lead, and five to ten functional or business-unit heads. It directs the company, allocates resources, coordinates execution, and builds confidence.

The function chooses markets and investments, resolves conflicts, appoints leaders, and responds when assumptions fail. Its scorecard covers revenue growth, EBITDA or EBIT, cash conversion, return on invested capital, customer retention, pipeline, delivery and quality, employee indicators, milestones, covenant compliance, and valuation or exit readiness.

### Eight processes

| | | | |
|---|---|---|---|
| 01 | Strategy, annual planning, budget and target setting | 05 | M&A and partnerships |
| 02 | Management meeting rhythm | 06 | Customer, owner and organizational communication |
| 03 | KPI review and strategic-initiative follow-through | 07 | Management-team hiring and development |
| 04 | Board and owner reporting | 08 | Crisis and exception handling |

Records sit across ERP, CRM, HRIS, BI, Microsoft 365 or Google Workspace, board portals, project tools, and spreadsheets. Reasoning remains in conversations, inboxes, messages, and memories.

Fragmentation sends questions into the room with missing evidence, loose assumptions, and few options. The CEO must first build a company view.

## Management meetings reconstruct the company before deciding.

WHAT CHANGES STRUCTURALLY

# Every major decision arrives *prepared*.

A management team is considering a new market. Today, the first serious challenge may happen in the meeting itself. The demand case looks attractive, but nobody has tested how customers buy, what the move would displace, where delivery would break, or which assumption holds the whole case together.

An AI-augmented team changes the work before the meeting.

**The few decisions that matter receive far deeper preparation.** The team may make perhaps fifteen decisions a year that genuinely shape the company. Each can arrive with the weak number pulled forward, the missing diagnosis exposed, the argument tested, and the hard questions written by something with no career to protect. A polished plan cannot hide the absence of a clear obstacle.

**Strategic bets are examined through several possible futures.** The team can test what must be true for a proposal to work, what breaks first, how the result changes when a key assumption moves, and what the company would have to stop doing. A single spreadsheet and a confident presentation no longer have to carry the full weight of the call.

**Established method reaches work that rarely receives it today.** A senior leader may know the company after a decade inside it, yet may have faced the hard version of a pricing, market, deal, or leadership question only twice in a career. The best method for that question often exists. An agent can bring it into the work at the moment it is needed.

The value appears in what the company chooses and what those choices become. A better initiative is funded. Its risks are understood earlier. Its owner knows what success means. The team can see when the original case no longer holds.

> A team can get twenty percent faster and not one decision better. Better preparation changes the decision itself.

> WHERE IT IS WEAKEST AI is weakest where motives are hidden, trust has broken, facts remain disputed, or consequences must be carried through human relationships. It can sharpen the case, expose uncertainty, and prepare choices. Leaders still make the call and answer for it.

THE 2028 OPERATING PICTURE

# A day, a week, a *month*.

On Monday morning, the CEO opens a brief on a proposed pricing change. It does more than summarize the latest reports. It shows the diagnosis, challenges the logic, identifies the assumptions that need proof, and lays out the possible effects on customers, margin, sales behavior, and delivery.

By 2028, the management team still contains roughly the same leaders. Their time moves from collecting material and drafting first versions toward choices, senior relationships, leadership quality, and unexpected events. The executive assistant spends less time chasing inputs. A chief of staff, strategy lead, or PMO owner helps protect the quality of decision preparation and the team's own agents.

### The day

**MORNING**
The CEO receives a short brief on the questions that need attention. Each item begins with the decision to be made, the current diagnosis, and the evidence behind it. Weak facts, open assumptions, and conflicts between functions are visible. Routine updates remain with the responsible leader.

**DURING THE DAY**
An agent prepares the next step for each live question. It may compare a proposal with prior commitments, test a forecast under several conditions, retrieve the best method for the task, or draft the questions a skeptical board member would ask. The executive reviews the work, corrects missing context, and chooses which options deserve further study.

**AFTER**
Once a decision is made, the accepted initiative carries the case behind it: the intended result, owner, milestones, dependencies, assumptions, and conditions for review. Evidence from the work enters later preparation. The responsible leader remains accountable for delivery and recovery.

**THE WEEK** The management team receives a pre-read built around choices rather than reports. Each decision has a clear question, a tested diagnosis, the strongest case for and against, credible scenarios, and the trade-offs that need the team. The meeting spends its time on disagreement, judgment, and commitment. Earlier decisions and supporting evidence can be retrieved when the current debate depends on them.

**THE MONTH** The operating review asks whether the company's major choices are producing what the team expected. Finance owns the numbers. Commercial and operations leaders explain causes. The team compares actual results with the budget, forecast, and assumptions behind funded initiatives. Board preparation starts from the same work, with likely questions and weak points examined before the pack is approved.

The day is organized around decisions being prepared, made, and turned into initiatives. The CEO receives fewer unfinished questions and more work that is ready for judgment.

PROCESS BY PROCESS

# What runs, and what stays with the *person*.

A good agent does not replace the executive in the right-hand column. It makes the work in the middle column deep enough that the person can make a better call.

| PROCESS | WHAT THE AGENT DOES | WHAT STAYS WITH THE PERSON |
|---|---|---|
| **Strategy, annual plan, budget and targets** | Tests diagnosis against plan; compares proposals with market evidence and limits; builds scenarios; shows what must be true, what breaks first, and what must stop | Direction, trade-offs, capital allocation, targets, and the bet; the CFO approves planning-system changes |
| **Management meeting rhythm** | Builds decision-focused pre-reads; challenges weak claims; prepares arguments on each side; drafts decisions and extracts actions from approved material | The chair chooses what deserves the room, confirms decisions, protects disagreement, and names what remains open |
| **KPI and initiative follow-through** | Connects results to the original case; requests evidence; tests whether the diagnosis holds; prepares recovery options when delivery slips | Owners explain causes, choose recovery, reset commitments when needed, and remain accountable for outcomes |
| **Board and owner reporting** | Assembles a cited draft; checks numbers against prior commitments; tests the story; prepares likely questions and hard follow-ups | CEO owns the message; CFO, company secretary, and relevant executives approve material statements |
| **M&A and partnerships** | Screens markets and targets against the thesis; summarizes diligence; models integration; identifies assumptions, deal breakers, and open questions | Valuation, negotiation, risk acceptance, partner choice, and final recommendation |
| **Customer, owner and organizational communication** | Prepares relationships using history and current evidence; drafts audience-specific messages; tests likely reactions and questions | The CEO chooses message, tone, promises, and timing, then approves communications |
| **Management-team hiring and development** | Assembles evidence; identifies gaps and conflicts; applies established methods to role design, interviews, feedback, and development | CEO and board decide appointments, succession, compensation, development, and removal |
| **Crisis and exception handling** | Builds a verified timeline; separates facts from claims; retrieves playbooks; tests responses; prepares each path's questions and communications | Crisis lead confirms facts, weighs consequences, chooses the response, and makes material decisions |

*The right-hand column holds the bets, relationships, and consequences that define the company. The middle column ensures those calls rest on deeper preparation.*

DATA AND CONNECTIONS

# Four stages, mapped onto *The Access Ladder*.

Until recently, AI reasoned only about pasted material, not the current pipeline, approved budget, customer history, or team promises.

MCP stands for Model Context Protocol, a standard that connects AI to company systems with permission. Access grows one rung at a time, while judgment stays with the person.

**01** **Documents only**
Approved strategy documents, board packs, meeting material, initiative records, and operating reports form the first rung. The agent tests proposals against commitments and earlier reasoning. Executives verify outputs.

**02** **Read access**
Teams or Meet transcripts, Outlook or Gmail, SharePoint or Drive, calendars, and initiative registers add recent work. ERP, CRM, BI, and project systems add facts. The agent keeps source permissions and cites claims.

**03** **Read and act with approval**
The agent proposes a task, initiative update, evidence request, or bounded action. An identified person approves it. The system records requester, source, approver, response, and reversal.

**04** **Bounded autonomous action**
Approved-source retrieval, reminders, evidence requests, and briefings can run within limits. Financial, board, employment, M&A, and external crisis actions require human approval.

### The connection landscape in September 2026

| | |
|---|---|
| **Microsoft** | Microsoft Graph accesses Outlook, Teams, SharePoint, OneDrive, Planner and related services. Microsoft 365 Copilot supports synced and live federated connectors that preserve source permissions. Graph retrieves approved Teams transcripts and summaries. |
| **Google Workspace** | APIs cover Gmail, Drive, Calendar and Chat. Google's Drive MCP server remained in Developer Preview as of August 31, 2026, with read, create and download actions subject to administrator review. |
| **Business Central Online** | A Microsoft-hosted MCP endpoint is read-only by default. Administrators can permit bounded actions under the person's Entra identity. |
| **HubSpot and Salesforce** | HubSpot supports CRM search, activity and marketing-email writes under user permissions. Salesforce hosted MCP servers support SObject queries and CRUD; broader Headless 360 coverage remained beta. |
| **Spiris and Fortnox** | Spiris offers a beta hosted MCP server with write tools for Bookkeeping & Invoicing. Fortnox has a production REST API. Executive access needs a restricted wrapper or replicated read model. |
| **IFS Cloud, Monitor ERP, Upsales, SuperOffice, Lime CRM and SAP Business One** | Production APIs or service layers support several systems, but no general-purpose vendor-managed MCP service covers the group. A custom connector, middleware layer or warehouse feed is required. |

The real step forward is advice about your company, with your numbers, not advice about a company that sounds similar.

GRAIL'S THESIS

# Six things we believe, from building *this*.

A management team is judged by the quality of the few choices that shape the company and by what those choices become. Six beliefs guide how GRAIL approaches that work.

**01**

### The purpose of the management team is better decisions.

Its job is to think deeply about the few questions that decide direction, then turn that thinking into action. Everything else on the calendar prepares those moments or repairs what followed them. The right measure for a senior person is impact per hour.

**02**

### Copilot use is the floor, not the ceiling.

Cleaner email, faster drafts, and shorter summaries save real minutes and should remain. Yet a team can get twenty percent faster without improving a single important choice. GRAIL believes AI should be judged by the work and decisions it improves, not only by the time it releases.

**03**

### Every major decision should arrive already argued with.

The weak number should be exposed, the missing diagnosis named, and the strongest objections prepared before the meeting. An agent is business context plus world-class method brought to one hard thinking task. It should refuse to build a plan when the logic beneath it is missing.

**04**

### Big bets deserve several futures, not one favored forecast.

A strategic proposal should show the assumptions it depends on, what breaks first, what would change the outcome, and what the company must stop doing to make room. This work used to be skipped because the team lacked time and specialist support. Agents make it practical to examine the bet before the company commits.

**05**

### Better initiatives compound.

The initiative funded in March should still be the right initiative in November, supported by evidence and clear conditions for review. Each sound choice improves the base from which the next choice is made. Run two similar companies five years apart on initiative quality and they become barely comparable.

**06**

### Bring the world's method to the company's top-line questions.

An executive may have faced a hard pricing, market, deal, or leadership question only twice in a career, while the relevant method has been refined across many cases. GRAIL believes that method should sit beneath nearly every major pre-read and decision. Point it at the market nobody had time to study, the pricing model nobody dared reopen, and the customer conversations nobody could prepare.

"The constraint was never the size of the team. It is imagination." The largest prize is the work the management team could not previously attempt, aimed at choices that create a stronger company.

WHAT IT ASKS OF PEOPLE

# Roles, rhythm, and where it *fails*.

The next management meeting has fewer presentations. Each leader has already reviewed the evidence, corrected missing context, and read the strongest case against the preferred option. The room begins with the question that needs a call.

The CEO becomes less of an information router and more of a leader of judgment. Time moves toward choices, senior relationships, leadership quality, and unexpected events. The CEO asks whether the diagnosis is strong enough, whether the scenarios cover the real risk, and whether the proposed initiative deserves the resources it will consume.

The executive assistant moves toward meeting flow and the quality of preparation. The chief of staff, strategy lead, or PMO owner helps shape decision briefs, protect shared definitions, and look after the team's agents. Functional leaders confirm evidence, challenge assumptions, and own the consequences of the recommendations they bring.

The whole team needs source-checking discipline, clear writing, scenario judgment, basic data literacy, and the ability to define what an agent may do. Executives must tell the difference between a plausible answer and a well-supported one. They must also recognize that the agent may find a flaw in a favored idea, and make room for that challenge.

### The rhythm

**FIRST CONNECTED WORKFLOW**
Approved documents, meeting capture, and source checking support one important decision from question through preparation

**SIX TO TWELVE WEEKS**
Useful individual habits around stronger briefs, challenged diagnoses, scenario work, and evidence review

**ABOUT THREE MONTHS**
Stable team use with shared standards for decision preparation, confirmed sources, and a changed meeting agenda

**SIX TO TWELVE MONTHS**
A connected management rhythm across company systems, major decisions, board preparation, and initiative follow-through

*The sequence reflects habit formation, permission work, source quality, connected data, and redesign of the management cadence. Tool access is only one part of the change.*

> **WHERE IT FAILS** The old meeting remains while more summaries are added. The team measures minutes saved but never asks whether decisions improved. Nobody owns the quality of the pre-read. Agents receive stale or partial context. A preferred plan is accepted without a diagnosis. Scenario work becomes decoration around a decision already made. Leaders stop checking sources. The tracker is treated as accountability. Initiatives lose their owner, intended result, acceptance condition, or rule for review.

Change the preparation, the meeting, and the follow-through together. Otherwise the team receives faster material and keeps making decisions in exactly the same way.

HAVE YOU THOUGHT ABOUT THIS?

# Twelve questions for the CEO and *management team*.

1. Your management team may make perhaps fifteen decisions a year that genuinely shape the company. Which decisions deserve far more preparation than they receive today?

2. A major proposal could arrive with its weakest number, missing evidence, and strongest objection already exposed. Which current proposal would survive that test?

3. An agent could refuse to plan until the team names the real obstacle. Which strategic goal is currently stated as an outcome without a diagnosis?

4. Several scenarios could show what must be true, what breaks first, and what the company would need to stop doing. Which major bet still rests on one favored forecast?

5. Each initiative could retain the case behind it and be reviewed when its assumptions change. Which funded initiative is still running even though its original logic may no longer hold?

6. Your pricing model could be reopened with customer evidence, transaction data, delivery effects, and tested alternatives. Which part of pricing has become too familiar to question?

7. A market the team never had time to study could receive the same depth of work as the current core business. Which growth opportunity remains unexplored because the preparation looked too large?

8. A hundred important customer conversations could be prepared from account history, current issues, commercial goals, and likely objections. Which relationships would improve with that depth?

9. A deal review could test a target against the acquisition thesis, several integration paths, and the lessons of prior deals. Which assumption should be challenged before advisers begin?

10. A board pre-read could prepare the hardest questions, opposing case, and weak points in the proposed story. Where is the board likely to see a risk the management team has normalized?

11. A leadership decision could begin with documented evidence and a proven method for the conversation while leaving the judgment with the CEO and board. Which people decision needs better preparation now?

12. The management team could review AI by the quality of decisions and initiatives it improves. What would the team measure if minutes saved were no longer enough?

*These are the questions the program is built to answer with the people who run the company, using their own numbers, choices, and commercial ambitions.*