We've understood a little bit about the ideals and ideas behind workflow automation. Went through and we've defined some terms. You understand why workflow automation matters and how you can kind of incorporate it into the day-to-day life for what you need to do.

In the next lesson, we're going to actually look at how to incorporate it into the whole world. But what you need to do before you even do that, like now that you understand basically what it is, is sell it to the C-suite. So your entire role here basically is to create a path of least resistance to incorporating ai and automation.

You're basically paving the path to allow AI automation, workflow optimization, all this stuff that we've just learned about, all those things. The C-suite doesn't know or really honestly even care about any of that stuff. So they all have their own KPIs, their own metrics, their own vision for wherever they needs to be and you just adding things into that is just going to probably cause more chaos, right?

So, you come at it with knowing where they're at, knowing with what words they use and what they measure as success. So what that means is you can craft your language into their world and it makes it a lot easier for them to receive. So you don't have to translate high-level theories about process optimization, workflow automation, and all the stuff that their eyes will just gloss over about. Maybe your eyes glossed over at the last couple of lessons too, but it's kind of critical that you understand the base level foundations of how this stuff works so that way you can bring it and walk into any boardroom. Know the personas that you're talking to, the words that they use, like the definitional terms that they will agree and disagree with. And also their motivations because if you don't know who you're talking to and how you're trying to get the path down for AI. It's never going to work.

There's just nothing you're going to do. You're going to be a victim of them not being able to receive the message because of the messenger. You're just going to give them something that they're going to just gloss over, and you're going to use a bunch of terms that they don't care about. That's going to be the end of that. You have to understand who you're talking, okay?

So that being said, we're going to talk about the C-suite perspective.

There's a whole bunch of new C-suite that you may or may not deal with, especially in startups. Startups really like to create their own C-suite but traditionally you're going to have three that you deal with, okay?

The first is going to be the **CFO** and this is going to be the one that is going to be your initial hurdle because they're the ones that have to justify your existence in. So you're probably gonna be brought in by like a CTO or maybe a VP of Product or something like that, and an Efficiency Expert, or who's the AI to move us into the future, or however it is you're gonna position it.

But the **CFO** is the guy who only cares about the benefits of it and how much it costs. So their concerns are gonna be **ROI**, **RISK ASSESSMENT**, and then **LIQUIDITY AND CASH FLOW**.

So if you come to them and tell them, "Hey, look, we have this short term operation that's going to cost this much money, but long term, it's going to free up this much liquidity within your budget. And your budget doesn't have to move whatsoever and you're going to have this much leeway within it." It's easy for them to get on board with you because they don't have any real work to do at that point, other than move money that they've already allocated. So they don't have to add money or take money away from the top line or bottom line.

It's just they get to do what they love to do which is like mess with the wiggle room, like the middle of it. So they get the color within the lines and they don't have to change their end or end your beer or quarterly or fiscally budget at all. They can just reallocate that money within. They can play that Tetris within that game. And that's what these guys love to do. So if you can go to them and say, "Hey, look, you know, we're going to optimize our processes and we're going to make sure everyone else is more productive and we're going to increase our billing hours by this much money and be this much more profitable," they're going to get right on board.

If you go with them and you say, "Well, we're going to shop on AI to make ourselves better," they're not going to care because you're not talking their terms.

The next person that you're probably going to be shut down a lot in is going to be the **CEO**. A lot of times it's because it's going to be an ego play. CEO is the end-all be-all in these corporations. So they're the person, they're the hippo, highest paid person's opinion. So if they didn't bring you in, they are the person that you have to get on your side. And a lot of times, you have to just get them to a point where they feel like AI or automation is their idea. And you just kind of like hold them along the dance. And there's a lot of rigmarole and there's a little bit of change management that happens with CEOs that don't bring you on.

But the CEO that does bring you on, they're going to give you the keys to the castle because if you succeed and how they think you're going to succeed, then they're the magic man. They're the rainmaker. They brought in the wizard.

So, obviously, if they're the one that brought you in, none of this matters. But if they didn't bring you in, and if you're brought in by a CFO to save money or be more efficient, or you're brought in by a CTO to optimize process time, or you just walked into a boardroom because you got a meeting, because you're good at what you do, whatever that is, the CEO is either going to be your best friend or your worst enemy.

They're either going to be the one that's just absolutely let you do whatever you need to do with all the processes and they're going to just be your champion. Or they're going to be the one that's fighting you every single time. You're going to have to justify your existence.

So the real thing that they're going to care about is what's going to cost me and people. Meaning do I have to give you people? And are you going to be able to get rid of people for me? Compliance and ethical concerns should be my opinion. Something that they really care about but some may not care. And compliance and ethical meaning data compliance, personal identifying information, all that stuff. But also ethical concerns me. How many people in my workforce are going to be replaced by this? Am I going to be a hatchet man? Am I going to remove a bunch of workers with automation and AI? Or am I going to augment my workers and allow us to become more profitable?

It really just depends on the CEO and how they want to do things, right? So you're not going to know that until you talk to them.

And then you have the **CTO**.

So these are like the three that you're really going to run into: the CFO, CEO, and CTO. And that's Chief Financial Officer, Chief Executive Officer, and Chief Technical Officer.

So the CTO, again, they're going to be like your second best friend or second worst enemy. Maybe even worse than the CEO because the CTO has access that the CEO also has access to but the CTO knows the combinations in his head. And he probably helped build the systems, or at least has the people who built it on speed up.

So if the CTO is fighting you, then you're in like quicksand. And everything that you do is just like one step, but like four steps. So you have to just keep working and moving in different directions. And they keep, like, moving the foundations and changing things. They don't tell you, like, they're working against you.

A CTO is just almost impossible. But the only way around that is you get the CEO on board with you. And then the CEO goes to the CTO and then all of a sudden CTO works with you. Once the CTO works with you, you're cooking with gas.

So really the CFO is going to be the easiest to win over because they're just going to say, "Great." And you may have a Chief Data Officer as well like in the startups. Same idea. These are just 100% just-the-facts data type people. You're just going to tell them, "Hey. You know, bottom line is we're going to save you this much money over the quarter eventually 50% operations. And we're going to speed your processes up by 90%."

So whatever that cost is, they're just going to write that off. And as long as you come in underneath that, then there's 0 chance that any of these guys are going to look at you and say, "No, I don't want you to come in here and save me." But you have to absolutely deliver on that promise. Using process optimization, workflow automation, you can strap AI on top of all of that and you're even faster.

So definitely CFO is not that big of a deal but they can be if they're typical bean counters. Like they want to balance everything. So if you can't give them an idea about ROI because there's no intangibles, because you haven't done this or you haven't really looked at it,

then you just have to get them on your side. And let them look at the numbers and have them do the math of reducing operational costs by 50% and then go from there.

CEO again, if they brought you in, they're going to be your best friend. If someone else brought you in, you have to win them over. If you don't have the CEO, just don't do it. It's just not going to happen. They're critical. They're top-down. They have to be on board. If they're like "AI is a fad", just don't even bother because you're going to do all these things and you get all these systems built and then the CEO is just going to pull the rug out.

So the first thing that you do is get the CEO on board. Hopefully CEO brought you in and this isn't even like it's a moot point because the CEO hired you and they're all about it. And then that's great. But if the CTO and CFO brought you in and the CEO is like wishy washy, the first thing you do is you have as many meetings with this person that you can to get them on board. Whatever it is that you have to do. You just get them excited. Find out what it is that they love about life and then incorporate AI somehow to get them in that aha moment where they're just like, "Oh my God, we need this." And then you cook and then you go.

But until then it's an exercise in futility. Like you just have to get this human on board. I can't repeat it enough. Get the CEO on board. Get the CEO on board. Okay.

CTO kind of the same way, like you can work around the CTO. It's kind of a pain in the butt. The CTO can be ad run though. But they're usually program people, so they're usually just data guys. They program the developers that have gotten into a leadership position. Most of these guys don't have MBAs. They're usually like actual developers that got into that position.

So you can present them process optimization, and then they're going to be probably super excited about the AI anyways. The only thing that you're going to run into with a lot of the CTOs is they're not traditionally trained in business. So they put a lot of self worth into what they do in their position and presenting like they're the smartest person in the room because they're supposed to be so you may have a little bit of like ego-based competition where you're going to enter as an expert in AI.

AI is technically under the purview of the CTO. Kinda. right? It's Chief Technology. So sure. But this is different because AI is a holistic view. If you look at it this way, AI is a system's holistic view of everything that you do. So you guys are equal. They may know the AI architecture as well, but they're not going to understand how to use it in business probably as well as you do.

So you're not competing. You're using tools in a little bit different way but it's hard for them to understand that sometimes. Especially if they have a new person entering and saying, "Hey, let's use AI." And they may have been saying, "Let's use AI" for a while.

So the CTO can be your best friend, can be your second best friend, can be your second worst enemy.

The CEO, 100% can be your worst enemy without doubt. Get the CEO on board.

CFO is just a person that you have to concern yourself with but they're easy to sway. Okay? So again, for the CFO, what do you want to know? They want to know **ROI**, **cost savings**, **CAPEX** and **OPEX**. It's pretty simple. They just want to know how much money is this going to cost? How much money am I going to save or make? What are the operational and capital expenditures I need on it? So like how much money goes in? how much money goes out? and how much money is going to be within those margins?

Those are going to just basically be the numbers that you need. And they're easy to come up with because you can estimate out at that 50-90, like estimate out 90% process increase speed and 50% operational cost. And then you just ask them fine. What's your operational cost? And if they don't know that, they're not a good CFO. and then we can work with that.

But they're more than likely going to have a baseline operational costs, are going to tell you whatever x over x, 20M a quarter or whatever. And then from there, you can use some of the calculators to determine "All right, well, if you save this much money over this much time, this is the difference that you can have."

So, you may need to know their possible acquisition and lifetime value or average order value, a couple of different variables that you can use.

In the dashboard and in the software, there's calculators that you can use to determine like ROI of AI and things like that. So check those out. Those are definitely the tools that you want to check out.

But the end of it is you go in and you say, "This is how much wiggle your room you have within the money you already have spent or already spending. And this is how much we can change that. Up your ad spend, lower your operational costs. More customers, more profit." So they're pretty easy. Okay.

And then you get the CEO and COO. Now the COO is a Chief Operating Officer. They're gonna be like number two in the whole organization. Most COOs are pretty organized. Most CEOs are the opposite of a COO.

So the CEO is the person that explodes the Lego box and then build something. And the COO is the one that comes around and finishes and puts all the Legos away. Makes sure everything's good and labeled and everyone knows how to build whatever the CEO just wanted. So they're kind of like not really clean up because they have their own organizational way of things, but they're the person that controls the grenade that the CEO is.

So the CEO tends to grenade and will go with chaos and the COO comes behind them, lets them grenade but controls that explosion. So it allows the CEO to feel that chaotic movement and like that vision movement but the CEO controls the wake and allows everyone else to follow in line without having to navigate. Right?

So COO is usually a systems person. They're pretty organized. They're usually either on par or smarter actually than the CTO. It just depends on how the organization was built. Like COO is usually like the head person. Usually the CEO is asking COO daily operational things, like how things work, where things go, that type of thing. So it seems like the COO is actually in charge, but the CEO is the one that has the driven that's driving the boat, right?

So it's a interesting battlefield that the C-suite is, but either way it's a COO or the CEO, the metrics that you need to know are all business metrics.

It's just going to be accuracy and quality, time-to-market, user engagement, and operational savings.

Operational savings is going to come from the CFO. So you probably don't need to give this to them, but this is the really at the bottom line. This is the thing that they're going to look at and they're going to say, "Operational savings. This is great. I need 50% savings, 20M. That's a $10M month over month savings, right?" So that's the thing that's going to give them that aha moment.

And the time-to-market is just honestly, CEOs only only care about what happens next. So how long is it going to be before we can get this thing working? Something that they care about.

Accuracy and quality because it's their name on the Forbes list. It's their name on the NASDAQ. It's their name on the blog post that says they were completely wrong because they were running their AI wrong. So there's an ego play there but it's their company. They want to know that their data is accurate so they don't want to just trust things that aren't there.

And then the CTO, it's just all tech stuff. They're just going to want to know how long the AI was up for. How long it's going to take the employees to get trained up on the system? How long does it take the system to get updated? How long will it take for the system to come up after it went down? They're going to have aggregate customer satisfaction scores to determine if they like AI or not.

And again, this all depends on if they're your friend or not. This is all three of these, the CFO not really, but the CEO and CTO, what they're looking for and what they're going to measure you on is dependent upon and if they're on board with you.

Why I keep saying get the CEO on board? Because they're going to start looking for direct ROI receipts, hard tangibles, things that you don't have to give them because you're figuring stuff out.

If they're on board, then it's a trust game. And that's a winnable game. That's fine. They trust you because you're trustworthy and you know what you're talking about. You're moving the ball forward and that's the measurement. The measurement is the current version measured against the previous version.

And when they're not on board with you, they want to measure the perceived future version against the current version. And that's untenable. You can't have that. There's no way. Because as soon as you get to the "future version", now it's the present. And you can only measure where you've come from in the past. You can never measure the future. It doesn't work that way. And if they're ever doing that, the goalposts move too easy and you don't have the ability to actually reign it in.

So that's why you have to get the CEO on board. They have to get with it and say, "All right. At a certain time, look from where we were to where we are." And we can measure that. We measure those gains. We don't measure where we want to be because that's impossible. And that's just moving at all times and it's subjective. But that's what happens when they're not on board with you

When they're not on board with you, they say, "Oh, okay, well, where are we going?"

And now you either have to kind of like, fudge it and make up something. Or you have to look them in the face and tell them "You don't understand what we're doing here." And have that conversation over and over and over until they get on board. And if they're just on board from the beginning, none of this happens.

So get the CEO on board.

So what did we learn here? We learned this.

Leadership is not about titles, positions, or flowcharts. It's about one life influencing another. John C. Maxwell. Look him up. It's all about humans here.

It's all about the people like the CFO, CEO, CTO. They're all going to want different things. They all have different motivations. They're all going to need different inputs for their outputs. They all just have particular ways of looking at the same data. So you need to go through, understand what the metrics they have, what the words they have, who they are as humans and then you understand how to present this as the best way to lay the foundation to get AI in there.

And that's through process optimization and workflow automation, because now you're increasing your process speed, reducing their operational costs, and now you have money to play with. And also you're giving them like those aha, oh my God moments as you go. So just know that it's about setting the plan, getting the vision, and just moving forward and making sure that they don't switch and start measuring you from the future. They only measure you from where you've been to where you are.

So, yeah, just everyone is going to be different. There's no silver bullet for how to deal with the C-suite but if you get a general idea of who these people are and how they got to where they are and in the positions that they're in, then you'll understand the humans better and then you can actually present this data better.

And then once you can do that, then it's just iterating until they understand. But get the CEO on your side, no matter what.

So, again what do we learn? We learn that the C-suite are particular people, that they have their own motivations, their own metrics. Everything about them is going to be inside of that role. They took that leadership role inside the company for a reason. CFO is going to be pretty easy to convince for this stuff. It just makes sense to them. CEO, get them on your side. They have to be a hundred percent down. Then they have to be in your corner, on your side or it's just going to be horrible. CTO, the same goes for the COO, honestly, but the COO usually is just logical. They're going to look at this and be on board and they're going to be on your side immediately. You don't have to worry about them. The CTO can either be your second best friend or just really a hurdle for you so defer to them. Make sure that they know that they are just as important as you. You're not trying to replace them and you're going to come in and augment instead of replace.

So, thank you. If you have any questions, hit us up and we'll see you in the next one.