

EXECUTIVE GUIDE · 2026 EDITION

AI STACK FOR CEOs

*Configuration guide with setup steps, system prompts,
integration snippets, and a full Claude deep-dive.*

INSIDE THIS REPORT

- 01 Claude — Deep Dive
- 02 Thinking & Research
- 03 Visuals & Presentations
- 04 Automation & Workflow
- 05 Meetings & Knowledge
Implementation Roadmap

HOW TO USE THIS REPORT

Built to implement, not just to read.

Every tool entry follows the same structure: scan the header, check the Free vs Pro comparison (pricing verified June 2026), copy the snippet, and put it to work. Claude is Section 01 — the core tool that makes every other section work better. Start there, then add one tool per week.

SETUP

Numbered steps. Most take under 10 minutes. No IT required.

FREE vs PRO

Exactly what is free, what costs money, and what changes.

SNIPPET

Copy-paste prompts, webhook JSON, and API configs — ready to use.

COMPLEXITY LEVELS

STARTER

No IT. Setup yourself in under 10 minutes.

INTERMEDIATE

Minor config. Ops manager or EA can handle it.

ADVANCED

Requires developer or IT. Worth the investment.

RECOMMENDED START SEQUENCE

1	Claude (Free)	Set up Projects. Add system prompt and reference docs.
2	Perplexity + Otter.ai (Free)	Research and meeting capture from day one.
3	Gamma (400 free credits)	Build your first deck before committing to paid.
4	Zapier Automation	Connect Claude to one existing tool in your workflow.

CLAUDE

Deep Dive — Configure Once, Win Everywhere

Claude is not one tool — it is a configurable system. XML-structured prompts, Projects setup, activation patterns, and a clear understanding of Free vs Pro determine output quality.

FREE vs PRO — VERIFIED JUNE 2026

FREE	PRO
✓ Full access to Claude.ai chat	★ Extended thinking (complex reasoning)
✓ Create and use Projects	★ Priority speed & longer outputs
✓ Upload reference documents	★ More Projects & file uploads
✓ Standard response speed	★ Early access to new features

PROJECTS — CONFIGURE ONCE, USE FOREVER

Projects give Claude persistent memory of your business. Upload brand voice, client FAQs, and pricing docs once — every session inside that Project inherits full context.

01	claude.ai → Projects → New Project. Name by function. Works on Free tier.
02	Add a system instruction: role, client types, tone, what to never include.
03	Upload reference docs: pricing, content examples, brand voice guidelines.
04	One Project per function. Do not mix everything into a single Project.
05	Ask Claude to write using your materials. Refine until it nails it.

ACTIVATION CODES & ADVANCED PROMPTS

Type these before your task to shift output quality.

/ghost	Rewrites text to sound human. Removes AI phrases.	When: Posts, emails, proposals
/mirror	Learns your writing style then writes exactly like you.	When: Paste 3-5 own texts first
BEASTMODE	Longer, deeper responses with examples and full analysis.	When: Strategic decisions, complex briefs
GODMODE	Maximum detail. Skips hedging. Goes beyond generic.	When: Board strategy, high-stakes decisions
Absolute Mode	Zero diplomacy. Tells you exactly what is wrong.	When: Reviewing proposals before sending
PERSONA: [ROLE]	Claude becomes a specific expert with stated experience.	When: PERSONA: CFO with 20 years M&A
/autoprompt	Claude builds the optimal prompt from your rough brief.	When: When you can't articulate precisely
/chain	Executes a sequence of tasks in one go, no interruption.	When: Analyse > write > develop best one

ADVANCED TECHNIQUES

XML structure · Named stakeholders · Negative constraints · Context before task — 20–40% more consistent outputs.

XML & STRUCTURAL PROMPT PATTERNS

Structural patterns from Anthropic prompt engineering research.

XML STRUCTURE

Wrap content in <context>, <task>, and <format> tags. Anthropic trained Claude on this. Delivers 20–40% more consistent outputs vs plain text.

SNIPPET

```
<context>
  Write 150-word LinkedIn post about [TOPIC]
  Audience: C-suite EMEA.
</context>
<task>
  Hook first. No questions at end. Close with statement.
</task>
```

NEGATIVE CONSTRAINTS

Tell Claude what NOT to include. Respects do-not constraints more reliably than other models.

SNIPPET

```
Write an executive summary. Do NOT include:
  jargon, passive voice, hedging phrases,
  recommendations longer than one sentence,
  conclusions not in the data above.
```

CONTEXT BEFORE TASK

Full context first: who you serve, what you tried, biggest constraint. Generic context = generic output.

SNIPPET

```
CONTEXT: We serve [CLIENT TYPE] in [GEOGRAPHY].
Tried [APPROACH] — result: [OUTCOME].
Constraint: [TIME / BUDGET] Goal: [OUTCOME]
Now: [YOUR ACTUAL TASK]
```

NAMED STAKEHOLDERS

Name specific roles for perspectives. 'How would [CFO NAME] respond?' produces far more differentiated outputs than abstract 'stakeholder views.'

THINKING & RESEARCH

Replace your research analyst. Get briefed in minutes, not hours.

TOOL 01 — PERPLEXITY AI

Real-time AI search with cited sources. Every answer links to its source.

FREE	PRO
✓ Unlimited basic searches	★ Unlimited Pro Searches
✓ 5 Pro Searches per day	★ Advanced models & Deep Research
✓ No card required	★ Spaces (persistent context)
	★ \$20/month

SETUP

01	perplexity.ai — sign up free, no card needed.
02	Chrome extension — right-click any page to Search with Perplexity.
03	Set Focus: Academic for research, Web for news, YouTube for video.
04	Create Collections for recurring topics: clients, competitors, sector.

CONNECT WITH

S	Slack	/perplexity app — search without leaving the channel.
N	Notion	"Save to Notion" Chrome extension — one-click capture.
G	Gmail	Research, copy answer, paste into draft before client call.

SNIPPET

Pre-meeting intelligence brief – paste before every important meeting:
Research [COMPANY NAME] and return:
1. News from the last 30 days
2. Key decision-makers and recent changes
3. Competitive position and known challenges
4. Financial signals: funding, layoffs, expansion
5. Three questions to ask in a first meeting
> 90 seconds. Walk in knowing more than they expect.

CEO USE CASE

Before every important meeting. Free tier: 5 deep searches per day — enough for most executives.

PRO TIP

"Spaces" (Pro) = persistent research context. Remembers findings across sessions like a dedicated analyst.

TOOL 02 — NOTEBOOKLM (GOOGLE)

Upload up to 50 documents and query them simultaneously as a single knowledge base.

FREE	PRO
✓ Completely free	★ Google One AI Premium (\$19.99/mo)
✓ No limits, no card required	★ Longer Audio Overviews
✓ 50 sources per notebook	★ More sources per notebook
✓ Audio Overviews included	

SETUP

01	notebooklm.google.com — sign in with Google, free, start immediately.
02	New Notebook → upload PDFs, Google Docs, URLs, or audio files.
03	"Notebook Guide" auto-generates executive summary and FAQ.
04	"Audio Overview" creates a podcast-style briefing from all documents.

QUERY TEMPLATES

SNIPPET

"What are the 3 most important decisions across all documents?"
"Identify contradictions between these sources."
"Extract every action item and deadline in these files."
"What critical questions are NOT answered here?"
> Every answer cited to exact source. No hallucinations.

CEO USE CASE

Partner due diligence: upload website, annual report, press releases. Query all at once. 10 minutes replaces 3 hours.

PRO TIP

Upload 6 months of Otter.ai transcripts — query for patterns, unresolved commitments, recurring concerns.

VISUALS & PRESENTATIONS

Board-ready decks in minutes. Cinematic video without a production team.

TOOL 01 — GAMMA

Paste a brief — receive a fully designed presentation in 90 seconds.

FREE	PRO
✓ 400 one-time credits on signup	★ Plus: \$10/mo (600 credits)
✓ No card required	★ Pro: \$20/mo (unlimited)
	★ Removes Gamma branding

SETUP

01	gamma.app — sign up free, 400 credits, no card, start immediately.
02	New → Generate → paste your outline or brief in plain text.
03	Build custom theme using your exact brand hex codes. Do this once.
04	Export as PDF, PowerPoint (.pptx), or shareable live link.

SNIPPET

```
# Gamma generation prompt — deck in 90 seconds:
Audience: [WHO — role, sector, what they care about]
Topic: [WHAT — one clear subject]
Core message: [ONE SENTENCE — what should they believe after?]
Slides: Problem > Why now > Approach > Proof > Ask > Next steps
Tone: Premium, minimal, dark background, data-forward.
> Review, click any slide to edit, export. Done in under 10 minutes.
```

CEO USE CASE

Client needs a proposal by noon. 45 minutes. Paste brief, adjust 2 slides, export PDF. Done.

PRO TIP

Build custom theme with brand hex codes once. Every future deck is on-brand automatically.

TOOL 02 — HIGGSFIELD AI

Cinematic AI video from text or image prompts. Close the visual gap between your brand and every competitor.

FREE	PRO
✓ Limited free generations	★ Creator: \$39/mo
✓ Watermarked output	★ Unlimited generations
✓ Test quality before committing	★ 1080p export, no water mark
	★ 4K for website hero sections

SETUP

01	higgsfield.ai — sign up and test the free tier first.
02	"Animate": upload a still photo, add motion prompt, 6-second clip.
03	"Diffuse": text-to-video — describe scene, camera, lighting, mood.
04	Export 1080p for LinkedIn. 4K for website hero sections.

CONNECT WITH

L	LinkedIn	MP4 as native LinkedIn video — highest organic reach on the platform.
C	Canva	Import clips into Canva, add text, captions, logo overlay.
W	Website	Use as hero section background — immediate premium brand signal.

SNIPPET

Higgsfield text-to-video prompt:
Style: Cinematic, ultra-realistic, shallow depth of field
Scene: [LOCATION, time of day, atmosphere, key subject]
Camera: Slow push-in, wide to medium close-up
Lighting: Warm practical, cool ambient from outside
Motion: Subtle ambient only — no fast cuts
Mood: [Confident / Decisive / Premium — pick one]
Duration: 6 seconds. Iterate 2-3 generations.

CEO USE CASE

PRO TIP

Animate a still photo of your office or event. Six seconds of motion has more impact than six static posts.

Start with "Animate" — faster and more predictable than "Diffuse." Master still-to-motion first.

AUTOMATION & WORKFLOW

Connect your tools. Remove manual work. Reclaim hours every week.

TOOL 01 — ZAPIER + CLAUDE API

AI-powered workflows — intelligent processing, not just data transfer between apps.

FREE	PRO
✓ 5 Zaps on free plan	★ Professional: \$49/mo
✓ 100 tasks per month	★ Multi-step Zaps with filters
✓ Enough to test one workflow	★ 2,000 tasks per month

SETUP

01	zapier.com — sign up free and test one Zap before upgrading.
02	console.anthropic.com → API Keys → Create Key. Copy immediately — shown once.
03	New Zap → Action: Webhooks by Zapier → POST to Claude API endpoint.
04	Test with real data before activating. Verify output quality first.

CONNECT WITH

H	HubSpot	New contact triggers Claude qualification + personalised draft email.
S	Slack	Message triggers Claude analysis, scored summary posted to channel.
G	Gmail	Inbound email triggers Claude extraction, Notion logs action items.

SNIPPET

```
# Zapier Webhook to Claude API — enquiry qualification:
POST https://api.anthropic.com/v1/messages
Headers: {"x-api-key": "YOUR_KEY", "anthropic-version": "2023-06-01"}
Body: {"model": "claude-sonnet-4-6", "max_tokens": 400,
  "messages": [{"role": "user", "content":
    "Qualify this enquiry. Score 1-10. State reason,
    recommended service, first response draft.
    Name: {{name}}, Org: {{org}}, Message: {{msg}}"}]}
> Output posted as note on CRM contact record automatically.
```

MEETINGS & KNOWLEDGE

Every meeting transcribed, summarised, actioned. Nothing forgotten.

TOOL 01 — OTTER.AI

Real-time transcription, speaker identification, and AI summary — automatically.

FREE	PRO
✓ 300 minutes per month	★ Pro: \$16.99/mo (or \$8.33/mo annual)
✓ 30 minutes per meeting	★ 1,200 minutes per month
✓ OtterPilot bot included	★ 90 minutes per meeting

SETUP

01	otter.ai — sign up free. OtterPilot bot included on the free tier.
02	Connect Google Calendar or Outlook — Otter sees all scheduled meetings.
03	Enable OtterPilot — bot joins Zoom, Teams, and Meet automatically.
04	Connect Slack — summary posted to channel after each call ends.

CONNECT WITH

Z	Zoom	OtterPilot joins as bot — transcribes, identifies speakers, extracts actions.
S	Slack	Auto-posts meeting summary and action items to designated channel.
N	Notion	Zapier: transcript → Claude refines → Notion page created automatically.

SNIPPET

```
# Zapier: Otter → Claude → Notion → Slack
TRIGGER: Otter.ai new transcript completed

> STEP 1: Claude API — extract decisions, actions, open questions
"Extract: 3 key decisions, all actions (owner + deadline),
open questions, one-sentence summary. Transcript: {{text}}"
> STEP 2: Notion — create page in Meetings database
> STEP 3: Slack — post link to team channel
```

TOOL 02 — MICROSOFT COPILOT 365

AI across Teams, Outlook, Word, Excel, PowerPoint. Highest ROI for Microsoft organisations.

FREE	PRO
✓ No free tier	★ Copilot add-on: \$30/user/mo
✓ Requires existing Microsoft 365 subscription	★ Requires M365 Business Standard (\$12.50)
	★ Teams, Outlook, Word, Excel, PowerPoint

SETUP

01	Requires M365 Business Standard or higher — IT enables via Admin Centre.
02	Assign licences to leadership and ops first. Measure ROI before rollout.
03	Start with Teams — meeting summaries appear automatically, zero setup.
04	Enable Outlook — email thread summaries on every long conversation.

CONNECT WITH

T	Teams	Transcribes and summarises meetings — actions visible before you leave.
O	Outlook	Summarises threads, drafts replies, prepares meeting briefings.
E	Excel	Natural language: ask questions, generate charts, flag anomalies.

SNIPPET

```
# Copilot daily prompts – highest ROI uses:
# Teams: "Summarise key decisions and list all action items with owners."
# Teams: "What were the unresolved disagreements in this meeting?"
# Outlook: "Summarise this thread. What decision is needed from me?"
# Outlook: "Draft a reply accepting but requesting a two-week delay."
# Excel: "Identify top 3 anomalies and explain what caused them."
# Word: "Rewrite this section 40% shorter, no key points lost."
```

CEO USE CASE

For M365 organisations: meeting follow-up becomes automatic. Best when the full leadership team uses it.

PRO TIP

"Copilot Pages" (2025) — shared editable AI document from any Teams meeting. Shareable instantly.

IMPLEMENTATION ROADMAP

Five tools. Zero IT required to begin. One per week.

Pricing verified June 2026

WEEK 1

Claude — Projects Setup (Free)

Create your first Project. Add system prompt and reference documents. This unlocks everything.

WEEK 2

Perplexity + Otter.ai (Both Free)

Research and meeting capture. Immediate ROI from day one. Zero cost.

WEEK 3

Gamma — First AI Deck (400 free credits)

Build your first deck before committing to a paid plan. Test the workflow.

WEEK 4

Zapier — First Automation

Connect Claude to one workflow: enquiry scores + Notion logging. 20 minutes to build.

MONTH 2

Claude API + Advanced Workflows

Full pipeline and content automation. No manual steps between input and output.

FULL STACK COST — VERIFIED JUNE 2026

Perplexity	5 Pro Searches/day free	\$20/month
Claude	Full chat + Projects free	\$20/month
Gamma	400 one-time credits free	\$10/month (Plus)
Otter.ai	300 min/month free	\$16.99/month
NotebookLM	Fully free	Free
Zapier	5 Zaps / 100 tasks free	\$49/month
Higgsfield	Limited, watermarked free	\$39/month (optional)
Copilot 365	No free tier	\$30/user/mo (add-on)

CORE STACK COST

Without video or advanced automation: approximately \$67/month for the full executive AI stack.

READY TO CONFIGURE YOUR AI INFRASTRUCTURE?

KW Royal works with founders and executive teams on AI adoption, digital infrastructure, and brand strategy across EMEA.

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