

CEO Daily Brief Setup Guide

Build an Automated Morning Intelligence Report

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What Is a CEO Daily Brief?

Every morning at 7am, an AI agent pulls together your calendar, email highlights, sales pipeline, key metrics, industry news, and action items — then writes you a one-page brief. You start every day fully informed in 30 seconds.

This guide shows you how to build one.

What's in the Brief

- 1. Today's Calendar**
Meetings, calls, deadlines. With prep notes for each meeting pulled from context.
- 2. Email Highlights**
The 5-10 most important emails from the last 24 hours, summarized in one line each. Flagged items requiring your response.
- 3. Sales Pipeline Update**
New leads, deals that moved stages, deals at risk, expected closes this week.
- 4. Key Metrics Dashboard**
Yesterday's revenue, website traffic, support tickets, and any metrics that hit thresholds.
- 5. Industry & Competitor News**
Relevant news from your industry, competitor announcements, market moves.
- 6. Action Items**
Outstanding tasks assigned to you, overdue items, and upcoming deadlines.

Architecture Options

- **Option A: No-Code (Zapier + ChatGPT + Email)**
Complexity: Low. Zapier pulls data from calendar, CRM, email. ChatGPT formats it. Sends to your inbox. Cost: ~\$50/month.
- **Option B: Low-Code (n8n + Claude + Slack)**
Complexity: Medium. n8n orchestrates data pulls. Claude writes the brief. Delivered via Slack. Cost: ~\$30/month.
- **Option C: Custom Agent (Python + API integrations)**
Complexity: High. Full control, custom data sources, advanced formatting. Cost: API usage only.

Step-by-Step: Option A (Zapier)

1. Create a Zapier Zap triggered by Schedule (daily at 6:30am)
2. Add step: Google Calendar — Find Events (today)
3. Add step: Gmail — Find Emails (last 24 hours, inbox)

4. Add step: HubSpot — Find Deals (modified in last 24 hours)
5. Add step: ChatGPT — Conversation (compile all data into brief format)
6. Add step: Gmail — Send Email (to yourself with the formatted brief)

The Prompt Template

"You are an executive assistant preparing a CEO daily brief. Compile the following data into a clean, scannable one-page brief:

[CALENDAR DATA]

[EMAIL SUMMARIES]

[CRM DATA]

[METRICS]

Format as:

1. TODAY'S SCHEDULE (table: time, meeting, prep note)
2. EMAIL HIGHLIGHTS (bullet list: sender, subject, one-line summary, action needed Y/N)
3. PIPELINE UPDATE (new leads, stage changes, at-risk deals)
4. KEY METRICS (only flag metrics that changed significantly)
5. ACTION ITEMS (priority-ordered list)

Be concise. No fluff. Flag anything urgent with & p ."

About the Author

Justin P. Barrett is an entrepreneur, artist, and author. As CEO of Eyesafe, he built the global standard for display health technology. As founder of Alive LLC, he helps lean teams implement AI systems that actually work — agent architectures, knowledge bases, and automation workflows.

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