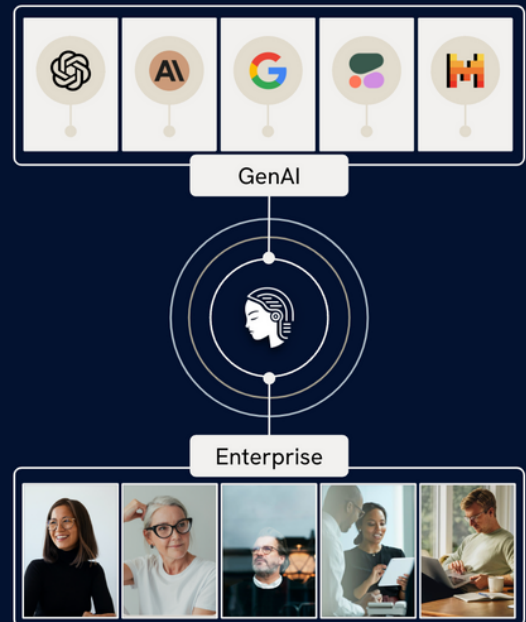


Guide to Building the Ultimate CEO Weekly Briefing Agent

elvex is the enterprise AI agent platform that anyone can build with on day one.



This is our show-and-tell guide for how we built the ultimate weekly briefing for our own CEO. You can use it to build your own weekly briefing.

In this guide:

- What the agent does
- How to set up the data flows
- Explanations of each sub-agent, and copy-pasteable prompt engineering
- An example output of one of these reports

What the CEO Briefing Agent does

The agent compiles a weekly briefing by orchestrating multiple AI sub-agents that analyze the CEO's calendar for upcoming meetings, tracks competitor and industry news, and creates reports on company performance metrics.

Every Sunday evening, it runs the sequence of sub-agents, and then delivers the compiled weekly brief to the CEO to prep them for the week ahead.

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Weekly Briefing - October 13-19, 2025

Executive Summary

This week features several key meetings with external contacts in sales operations and enterprise partnerships, internal leadership syncs, and a board preparation session. The focus is on strategic partnerships, enterprise customer expansion, and operational excellence that align with scaling our CRM platform for mid-market and enterprise clients.

OKR & Performance Update

Data as of October 19, 2025

Pipeline Metrics (Salesforce)

Metric	This Week	Last Week	WoW Change
New Leads	847	762	+11.2%
Qualified Opportunities	124	138	-10.1%
Deals Closed	18	15	+20.0%
Pipeline Value	\$4.2M	\$3.8M	+10.5%

How difficult is this to set up?

The most difficult aspect of setting up this workflow is getting secure access to the data. There are several approaches to this.

Easier approach:

The easiest way to set up this workflow is by using a secure platform like elvex that already has live-sync connectors built to all the various tools you use.

This way you don't have to code, don't have to manually upload data, and can get started quickly.

More difficult approach:

- Set up regular exports from the various systems (Google Calendar, Salesforce, Amplitude, etc.).
- Compile all these reports into one extensive Google Sheet.
- Upload that to your secure access to ChatGPT, Claude, similar and run the prompts.
- Automate this via tools like Zapier and API access to LLMs.

Nearly every major tool these days has the functionality to deliver a report or export to either your email or to a spreadsheet.

Using Google Apps Script or similar tools, you can then automate the collection of these reports. You don't need to know how to code, you just need AI to guide you and a willingness to tinker. [Watch an example](#) of using Google Apps Script to automate getting data from one place to another within the Google Suite.

Want help building this?

[Talk to the elvex team](#) and we're happy to talk you through it.

Setting up each sub-agent

Sub-Agent 1: Calendar Prep & Meeting Intelligence

Overview

- **Connects to Google Calendar** to pull the week's meetings
- **Identifies all external attendees** (anyone without your company email)
- For each attendee:
 - **Runs web searches** to find recent news, LinkedIn updates, company announcements
 - **Searches CRM** for interaction history, deal status, and relationship context
 - **Generates a digest** of who they are, their role, and their company's current situation

Prompt engineering (copy paste this):

1. Read your Google Calendar Datasource for the next 7 days
2. Extract all attendee email addresses and meeting agendas
3. Filter to external attendees only (exclude @yourcompany.com)
4. For each external contact:
 - a. Search web for: "[Name] [Company]" + recent news
 - b. Query your Salesforce Data Source: contact record, deal history, last interaction
 - c. Compile: Name, Title, Company, Recent Activity, Relationship Status
5. Output format:
 - a. UPCOMING MEETINGS INTELLIGENCE
 - i. Monday, [Date]
 1. - [Time]: [Meeting Title]
 2. Attendees: [Name, Title, Company]
 3. Context: [2-3 sentences on who they are and recent activity]
 4. CRM Status: [Deal stage, last interaction, key notes]
 - ii. Tuesday, [Date]
 1. - [Time]: [Meeting Title]
 2. Attendees: [Name, Title, Company]
 3. Context: [2-3 sentences]
 4. CRM Status: [Deal stage, last interaction]
 - iii. [etc]

Sub-Agent 2: Competitor Tracking & Industry News

Overview

- Monitors and synthesizes information from:
 - **(Gmail) Industry newsletters and publications.** Subscribe to influential industry newsletters and set up a consistent Gmail filter for these newsletters. Set up an elvex data source that pulls everything tagged with that specific tag.
 - **(Web scraping) Competitor blog posts and press releases.** Set up an elvex datasource using the “Website as a datasource” option, pulling everything under the /blog/ path.
 - **(Gmail) Google Alerts for tracked topics and companies.** This one is more optional, but can be done if newsletters and websites aren’t providing the right information.
- Identifies trends, competitive moves, and market shifts
- Focuses only on the last 7 days of activity

Prompt engineering (copy paste this)

1. For all steps below, limit this to just the previous seven days.
2. Read your Industry Newsletters datasource. Grab every headline and hyperlink.
3. Read your Competitor Blogs datasource. Extract all product release information.
4. Read your Google Alerts datasource. Analyze if any are new/different from what you found in Industry Newsletters and Competitor Blogs.
5. Compile all the above information into a report separated into “Industry News” and “Competitor Moves” sections. Each section should have the headline of each update, and the word “Link” inserted at the end with the hyperlink to the source of the information.

Sub-Agent 3: OKR & Performance Update

Overview

- **Analyzes week-over-week changes in key metrics**
- Pulls data from multiple sources:
 - **(Salesforce)** Go-to-market pipeline numbers (new leads, opportunities, deals closed)
 - **(Amplitude)** Customer product usage metrics (active users, feature adoption, engagement)
 - **(Github)** Features marked for release this week
- These data sources are updated live, with dates for each, to enable week-over-week and month-over-month reporting
- Calculates changes and flags significant movements

Prompt engineering (copy paste this)

- Read your Salesforce Export Datasource for the last two weeks of pipeline numbers (new leads, opportunities, deals closed)
- Read your Amplitude Export Datasource for the last two weeks of customer product usage numbers (active users by company, total usage by company, total overall usage)
- Read your Github Export Datasource for any releases flagged for this week
- Compile the information into a report covering:
 - Week over week change (in percentages and in numbers) in pipeline metrics, noting any major deviations
 - Week over week change (in percentages and in numbers) in product usage metrics, noting any major deviations
 - Planned feature launches for this upcoming week

Stringing them all together

Once the sub-agents have been created, we use elvex's flow builder to tie them all together in a simple agentic workflow.



Read the latest about [elvex's flow builder](#).

Example Output

Given the regulated industries many of our customers operate in, we can't show you a real example of this report. Our apologies! But we have an example built on synthesized data from a hypothetical "CRM Company" to give you an example of what it looks like.

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Key Insight: Strong lead generation and close rates offset by declining opportunity qualification. Mid-market segment showing Q4 budget delays; enterprise pipeline remains healthy.

Product Usage (Amplitude)

Metric	This Week	Last Week	WoW Change
Active Users	12,847	12,203	+5.3% ✓
Daily Active Users	8,921	8,456	+5.5% ✓
AI Insights Adoption	4,203	3,876	+8.4% ✓
Avg. Session Duration	18.4 min	17.2 min	+7.0% ✓

Key Insight: Strong engagement across all metrics. AI features driving increased time in platform. Top growth accounts: TechFlow Industries (+42%), Meridian Financial (+38%).

Feature Releases This Week (Github)

Example Output (continued)

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Feature Releases This Week (Github)

- **Revenue Intelligence Dashboard v2.3** (Oct 21) - Enhanced forecasting with 15% improved accuracy
- **Mobile Offline Mode** (Oct 22) - #1 requested feature from field sales teams
- **Slack Integration 2.0** (Oct 24) - Expected to drive 10-15% increase in DAU
- **SOC 2 Type II Certification** (Oct 25) - Unblocks 12 enterprise deals in legal review

External Meetings & Contact Briefs

Tuesday, October 15 - 2:00 PM PT

Meeting: Strategic Partnership Discussion with Marcus Chen (45 minutes)
Contact: Marcus Chen
✉ marcus.chen@salesforge.io

Brief: Marcus Chen is the VP of Strategic Alliances at SalesForge, a sales enablement platform that integrates with leading CRM systems. He specializes in building technology partnerships that enhance sales workflows and has been instrumental in creating co-selling motions with major CRM providers. His team focuses on helping enterprise sales organizations maximize their tech stack ROI through seamless integrations.

Wednesday, October 16 - 11:00 AM PT

Meeting: Enterprise Customer Success Review with Patricia Okonkwo (30 minutes)
Contact: Patricia Okonkwo
✉ patricia@streamline-ops.com

Brief: Patricia Okonkwo is the Chief Operations Officer at Streamline Operations, a business process consulting firm specializing in CRM implementation and optimization for Fortune 500 companies. She helps enterprise clients transform their customer relationship strategies through technology adoption and change management. Her firm has deployed CRM solutions across 50+ enterprise organizations in the past three years.

Thursday, October 17 - 8:00 AM PT

Meeting: Revenue Operations Roundtable with David Kim @ Summit Ventures (1 hour)
External Contacts:

Jennifer Torres (Organizer)
✉ jennifer@revopsconsulting.com

Brief: Jennifer Torres is the Founder and CEO of RevOps Consulting Group, a specialized consultancy that helps B2B companies build scalable revenue operations frameworks. She's a thought leader in the RevOps space who advises C-suite executives on CRM strategy, sales process optimization, and go-to-market alignment.

David Kim
✉ david.kim@summitvc.com

Brief: David Kim is a Partner at Summit Ventures focusing on B2B SaaS investments, particularly in the sales and marketing technology sector. He has been covering the CRM and revenue

Example Output (continued)

David Kim

 david.kim@summitvc.com

Brief: David Kim is a Partner at Summit Ventures focusing on B2B SaaS investments, particularly in the sales and marketing technology sector. He has been covering the CRM and revenue intelligence space for over 15 years and provides strategic guidance to portfolio companies on scaling enterprise sales operations.

Aisha Patel

 aisha@revopsconsulting.com

Friday, October 18 - 10:00 AM PT

Meeting: Integration Partnership Exploration with Robert Fitzgerald (45 minutes)

Contact: Robert Fitzgerald

 rfitzgerald@databridge-solutions.com

Brief: Robert Fitzgerald is the Head of Business Development at DataBridge Solutions, an enterprise data integration platform that connects CRM systems with ERP, marketing automation, and analytics tools. He specializes in building embedded integration partnerships and has successfully launched co-marketing initiatives with several leading CRM providers to expand market reach.

Internal Team Meetings

Monday, October 13

- 11:00 AM: Leadership Team Kickoff (with Rachel)

Tuesday, October 14

- 10:00 AM: Product Roadmap Sync (with Priya)
- 1:00 PM: Enterprise Sales Pipeline Review (with James)
- 3:00 PM: Q4 Board Prep Session (with Sarah, CFO)

Wednesday, October 15

- 11:30 AM: Executive Team Meeting (with Keisha, Daniel, Priya, Thomas)

Thursday, October 17

- 8:00 AM: Revenue Operations Roundtable (with David)
- 9:00 AM: Strategic Planning Session (leadership team)

Friday, October 18

- 2:00 PM: Customer Advisory Board Planning (with Keisha and Daniel)

Competitor Intelligence Update

Recent Industry Updates

Salesforce Dreamforce 2025 Highlights

- Salesforce held their annual Dreamforce conference with record attendance

Example Output (continued)

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Save Changes

- Major announcements around Agentforce 2.0 and autonomous AI agents for sales
- Launched "Trailblazer Connect" - an enhanced community platform for customers and partners
- Showcased new Einstein AI capabilities for predictive pipeline management
- Featured enterprise customer success stories and expanded AppExchange partnerships

Product Launches and Features

- **AI Agents:** New autonomous SDR and customer service agents with advanced workflow automation
- **Revenue Intelligence:** Enhanced forecasting and deal insights powered by generative AI
- **Data Cloud Expansion:** Deeper integration capabilities across the entire customer data platform

Partnership Updates

- **AWS Partnership:** Salesforce announced expanded collaboration with AWS for enterprise deployments
- **Slack Integration:** New native CRM features embedded directly in Slack workflows
- **Various ISV partnerships:** Multiple new integrations with revenue operations and sales engagement platforms

Key Themes This Week

Strategic Partnerships: Multiple discussions with integration partners and alliance opportunities

Enterprise Focus: Meetings with enterprise consultants and customer success leaders

Revenue Operations: Roundtable discussion with RevOps experts and investors

Strategic Alignment: All external contacts are in the enterprise sales, partnerships, and consulting space, aligning well with current focus on scaling our CRM platform for mid-market and enterprise segments

Preparation Notes

The external contacts you're meeting with (Marcus Chen for strategic partnerships, Patricia Okonkwo for enterprise customer success, Jennifer Torres and David Kim for revenue operations strategy, and Robert Fitzgerald for integration partnerships) all represent potential collaboration opportunities in the enterprise CRM ecosystem. These conversations may support our expansion into larger enterprise accounts and strengthen our partner ecosystem.

Becoming AI-native is an iterative process, and we're here to help both you and your entire company upskill at the same time.

[Get in touch with elvex today.](#)

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Get in touch with us via www.elvex.ai

