

AI SECOND BRAIN · SETUP GUIDE

Build a second brain that remembers.

A daily brief prepares your day, then forgets it. This is the other half — a persistent memory of your work that captures itself overnight, so nothing you said mattered quietly disappears.

STRUCTURE	1 core routine · 4 optional modules
CORE NEEDS	An LLM, and a folder of markdown files
CADENCE	Daily · weekly · every six weeks
HONEST SETUP	An afternoon for the core. The habit takes longer.
WHERE IT LIVES	Plain text, on your own machine

Start here

Build the daily loop first. Add the rest only once the habit sticks.

Most second-brain guides hand you an elaborate system and hope you keep it alive. This one is deliberately the opposite: **one core routine you can run this afternoon**, and four modules you bolt on later — each only if it matches how you actually work.

The core needs no connectors, no automation and no code. It is a conversation with an LLM that reads and writes plain markdown files in a folder you control. Everything in **[BRACKETS]** is a placeholder.

RECOMMENDED PATH — WORK WITH YOUR LLM

- 1 Create a folder for your vault, with a **daily/** and a **notes/** subfolder inside it.
- 2 Paste the core routine from page 4 into your LLM, and say: *"This is my daily planning routine. Interview me about my role, my clients, and my goals, then rewrite it so it fits how I actually work."*
- 3 Answer its questions. Save the result as a reusable instruction — a Claude project, a saved prompt, or a skill file.
- 4 Run it tomorrow morning. Then run it the morning after that.
- 5 After a week, tell your LLM what felt like friction and let it revise. **The tuning is the value.**

Do not start with the automation. The nightly capture in Module C is the part people find impressive, but it is worthless without the daily habit that reads it. Earn the automation.

What this is not

It is not a chatbot that runs your business, and it is not autonomous. It drafts; you decide. Every guardrail on page 6 exists because an AI acting on unchecked context is exactly how the \$7,000 chatbot in this episode committed a dealership to a number nobody reviewed.

A NOTE ON THE TOOLS YOU SAW IN THE EPISODE

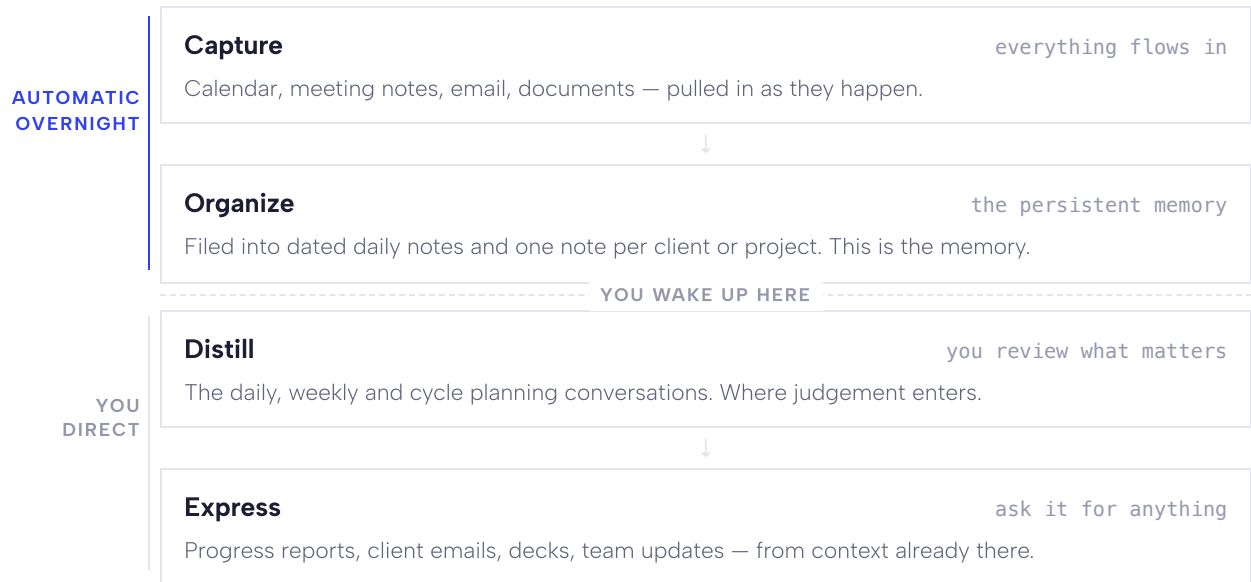
On the webinar I showed the vault in **Obsidian**. That was deliberate — I wanted hard separation between the fictional demo vault on screen and my real second brain, so no client information could ever appear. My own system runs on **Reflect Open** (reflect.app), which is what I would recommend if you want the closest thing to what I use.

Either works, and so does neither: the system is just markdown files in folders. Any editor can open it, and nothing here is locked to a vendor.

How it works

Four moves. The machine does the first two; you do the last two.

The framework is Tiago Forte's *Building a Second Brain* — Capture, Organize, Distill, Express. The book predates all of this. The only thing AI changes is that the top half stops being work.



The vault is two folders

```
your-vault/  
  daily/  
    2026-07-28.md  
  notes/  
    meridian-motors.md  
    quarterly-goals.md
```

Daily notes hold what happened and today's plan. Entity notes hold one client, project or person each. That is the entire data model.

Every entity note, same four sections

```
## Summary  
what this is, where it stands  
## Timeline  
dated log, newest first  
## Open items  
- [ ] commitments  
## Documents  
links that belong to it
```

The **Timeline** is what makes recall precise — it knows the call was Monday and the number changed Wednesday.

The core routine

The daily loop. No connectors, no automation — this works on day one.

Daily Planning – v1 (core)

My second brain lives at [VAULT_PATH]. Daily notes are at daily/YYYY-MM-DD.md, and each client or project has its own note in notes/. My priorities for the quarter are in [GOALS_NOTE]. My timezone is [TIMEZONE].

Be my planning partner. Run these phases in order, and **wait for me between each one** – this is a conversation, not a report.

1 • CLOSE OUT YESTERDAY. Read yesterday's note. For every meeting with no recorded outcome, ask me what came of it. List anything still unchecked and ask what carries forward. Write my answers back into yesterday's note.

2 • ENERGY. Ask me: high, medium or low? High, put the hardest thing first. Medium, favour finishing what is already moving. Low, maintenance only.

3 • CONTEXT. Read today's calendar and my most recent weekly focus. Summarise today in a few lines: what is scheduled, what the week is about.

4 • TOP 3. Propose exactly three outcomes for today. Specific and finishable ("send the pricing model to Dana", not "work on pricing"). Draw them from my open items and goals – **never invent them**. Sanity-check them against what the calendar realistically allows. Then propose a short "not doing today" list. Let me adjust both before you write anything.

5 • MEETING PREP. For each meeting today, first read the matching client note, then propose a one-sentence objective for it. One meeting at a time.

6 • WRITE IT. Write the Top 3, the guardrails and each meeting objective into today's note. **Read the file first and copy its existing headings exactly** – match the formatting already there, and never retype a heading from memory.

RULES. Write only inside my vault. Everything you produce is a draft – never send, post or message anyone. Stage any task you extract as "- [] ... (proposed)" so I confirm it before it counts.

WHY THE PHASES WAIT FOR YOU

The pauses are the point. A brief that talks at you gets skimmed; a routine that asks you questions gets answered — and the answers are what build the memory that makes next week's recall accurate.

The cadence

Four rhythms, four modules. Add one at a time.

WHEN	ROUTINE	WHAT IT READS	WHAT IT WRITES
Every morning	daily-planning	Yesterday's note, today's calendar, the weekly focus	Top 3, guardrails, an objective per meeting
Sunday	weekly-planning	The past 7 days, every active client note	Per-client status, 3 focus areas, weekly review
Every 6 weeks	cycle-planning	The past 6 weeks, your longer-range goals	5–8 outcomes for the next cycle
Nightly, 3am	context-ingest	Meeting transcripts, calendar events	Daily notes, meeting records, client timelines
Ad hoc	focus-block	Your Top 3 and open calendar gaps	Protected time blocks on your calendar

Optional modules

Each one only if it matches your actual workflow.

A • Weekly portfolio review

IF YOU JUGGLE MORE THAN TWO CLIENTS

Walks every active client note and gives you a status line each — moved, stuck, next, needs you — so next week's priorities are set against the whole portfolio instead of whatever shouted loudest.

[ADD AS A WEEKLY ROUTINE](#)

Read the last 7 daily notes and every note in **notes/** marked active. For each, report **moved / stuck / next / needs me**. Then propose 3 focus areas for the coming week, and save them where the daily routine can read them back.

B • Six-week cycle planning

IF YOU SET LONGER-RANGE GOALS

Zooms out past the week. Compares six weeks of actual behaviour against what you said you wanted, then sets a small number of outcomes for the next six.

[ADD EVERY SIX WEEKS](#)

Read the last 6 weeks of daily notes and [\[GOALS_NOTE\]](#). Summarise what actually moved versus what I said mattered, name the gap honestly, then help me set 5–8 outcomes for the next cycle.

Optional modules — continued

These two need a connector. Add them last.

C • Nightly meeting capture

IF YOUR MEETINGS ARE RECORDED

The part that runs while you sleep. Pulls each meeting, files it to the right client note, and leaves the memory ready before you wake up. **Add this last.**

ADD AS A SCHEDULED TASK

Each night, pull yesterday's meetings from [\[MEETING_TOOL\]](#). For each: write a record note, link it from that day's daily note, and add a dated line to the matching client's Timeline plus any commitments to its Open items. **Route by a map I maintain, never by guessing** — anything unmatched goes to an inbox note for me to file.

D • Calendar time-blocking

IF YOUR PRIORITIES KEEP SLIPPING

Turns the Top 3 into defended time. Finds the gaps and books the block, so the important work has somewhere to actually happen.

ADD TO THE END OF THE DAILY ROUTINE

For any Top 3 outcome not already covered by a meeting, propose a focus block in an open calendar gap. Ask me before creating anything, then create it as a movable block titled **FOCUS: subject** with no attendees.

ONE THING TO KNOW

This is designed to be lived with, not installed. Run the core for a week before you add a single module. The value does not come from the setup — it comes from the fact that on day thirty, it knows what happened on day four.

Placeholders & guardrails

The core needs four. The harness is not optional.

PLACEHOLDER	USED BY	WHAT TO PUT IN
[VAULT_PATH]	Core	The folder your notes live in, e.g. ~/second-brain/
[GOALS_NOTE]	Core, B	The note holding what you said matters this quarter
[TIMEZONE]	Core	e.g. America/Toronto, Europe/Dublin
[MEETING_TOOL]	C	Whatever records your calls, e.g. Granola, Gemini, Otter

The harness — five rules that stay on

- **It drafts, it never sends.** Emails, messages, posts — all drafts until you press send yourself.
- **Writes stay local.** The routines write to your own files. Nothing is pushed to a client-facing system.
- **Connectors are read-only.** The capture step looks; it does not create, update or delete anything.
- **Scope what it can see.** Point it at specific labels and folders, not your whole inbox. Keep genuinely sensitive material out entirely.
- **Extracted tasks are proposals.** Anything it thinks you committed to arrives marked (**proposed**) until you confirm it.

What the memory buys you

- **It remembers chronologically** — dated recall, not a vague summary.
- **It banks your context** — you stop re-explaining your own business.
- **It holds you accountable** — it knows what you said you would do.

The honest cost

An afternoon to stand up the core. A week of tuning to make it yours. And a daily ten minutes, permanently — that is the real price, and it is the one that stops most people. It compounds, which is the only reason it is worth paying.

Built for CXP Live Ep. 02 — *Meet your AI Chief of Staff.*

Companion to Vishnu's Daily Brief template. Start with his; build this when "what's on today" stops being the problem.