

AI excites me so
here's how I
convinced others it
was worth it

Jonathan Phillips

we
are
LITHOS PARTNERS



e: jonathan@lithos.partners
w: lithos.partners



Order the book



Co-founder, Lithos Partners

The weeknote: our weekly project heartbeat

Four-part structure, templated

1 Work completed

What we shipped this week — tasks done, meetings held, decisions made.

2 Work next week

What's scheduled and planned — no surprises for the client.

3 Red flags

Stalled tasks, blockers and risks that need attention.

4 Resourcing

Hours burned vs. total budget. Visible burndown against an agreed project total.

The Lithos Partners tech stack for weeknotes and broader productivity

01



Granola runs silently in every meeting, producing rich AI-enhanced transcripts. No manual note-taking. Every conversation is captured and searchable.

02

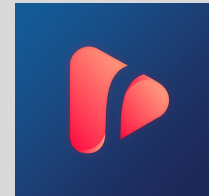


The system of record for all project tasks — with status tracking, timelines, ownership and a clear view of what's done, in progress or stalled.

03



Claude connects everything. It reads Granola transcripts, creates Monday tasks, writes weeknotes and maintains consistent project memory across sessions.



The weeknote workflow



The weeknote workflow



Demo

(Wish me luck)

we
are
LITHOS PARTNERS



Screenshots

Viva Engage pilot — launch date, comms, and measurement framework with Sarah

14 May Me ACME

Pilot Approval & Scope

- Steering group formally signed off Monday - full green light
- 12-week pilot confirmed with 3 communities:
 - Technology group
 - Early careers cohort
 - Project delivery community
- Leadership community removed from scope
 - CEO cautious about visibility during office refurbishment
 - Wants to avoid distractions before office move settles

Launch Timeline & Logistics

- **Launch date: May 28rd**
- Invitation comms: May 31st (weekend timing for better mobile engagement)
- **Viva Engage tenant ready by May 21st**
 - Microsoft 365 licensing sorted (everyone on E3 plan)
 - No seat issues for pilot cohort
- Marcus (M365 admin) needs briefing document by Thursday
 - Distribution list setup
 - Tenant configuration requirements
 - Community privacy settings and external content controls

Content & Onboarding Strategy

Ask anything

List recent todos

Used Granola integration, loaded tools >

Here's a summary of the latest ACME meeting:

Viva Engage Pilot — Launch date, comms & measurement framework 14 May 2026, with Sarah

Pilot Approval & Scope The steering group gave formal sign-off on Monday. The 12-week pilot covers three communities: Technology group, Early careers cohort, and Project delivery community. The leadership community was removed from scope — the CEO wants to avoid distractions ahead of the office move.

Launch Timeline

- **Launch date: 28 May**
- **Invitation comms: 31 May** (weekend timing for mobile engagement)
- **Viva Engage tenant to be ready by 21 May** — Microsoft 365 licensing confirmed (everyone on E3)

Content & Onboarding

- **Welcome video (2 mins max)** — Sharon leading, with Priya from the graduate cohort as on-camera talent
- **9 seed posts across three communities in week one** (mix of question, how-to, and informal)
- **Community names and descriptions needed by Friday for copywriting**

Screenshots

ACME planning AI suggestions New Integrate Automate / 1 Agents JP Invite / 2

Main table ... Gantt Kanban My Tasks Project Report +

New Task ... Search Person Filter ... Sort Hide Group by ...

To do

Task	Projects	Owner	Collaborat...	Status	Timeline	Dependent On	Proposed ...	Time tracking
IT briefing document for Marcus (M365 admin)	-	JP		Not Started	May 20 - 22			0m 0s
Confirm community names and descriptions for copyw...	-	JP		Not Started	May 20 - 23			0m 0s
Confirm MD availability for launch day post	-	JP		Not Started	May 20 - 23			0m 0s
Contact Priya about welcome video	-			Not Started	May 20 - 23			0m 0s
Send email summary of meeting actions to Sarah	-	JP		Done	May 14			0m 0s
+ Add task					May 14 - 23		0 days sum	-

Done

Task	Projects	Owner	Collaborat...	Status	Timeline	Dependent On	Proposed ...	Time tracking
+ Add task					-		0 days sum	-

generate the weeknote

How many hours have been used on the project so far?

33

Working

Get Board Items Page

Request

Write a message...

+

Sonnet 4.6

Screenshots

ACME — Weeknote w/e 23 May 2026

1. Work completed this week

- Steering group formally signed off the Viva Engage pilot — full green light received
- 12-week pilot scope confirmed: Technology group, Early careers cohort, and Project delivery community
- Launch date set for 28 May; invitation comms planned for 31 May
- Microsoft 365 licensing confirmed (all pilot cohort on E3 — no seat issues)
- Viva Engage tenant configuration underway, ready by 21 May
- Priya (graduate cohort lead) identified as on-camera talent for welcome video; Sharon to schedule call
- Measurement framework finalised — tracking active members, post frequency, reactions and comment depth, with checkpoints at weeks 4, 8 and 12
- Seed content strategy agreed: 9 posts across three communities in week one (question, how-to, and informal mix)
- Email summary of meeting actions sent to Sarah

2. Work next week

- IT briefing document for Marcus (M365 admin) — distribution list setup, tenant configuration, community privacy settings (due Thu 22 May)
- Confirm community names and descriptions for copywriting (due Fri 23 May)
- Confirm MD availability for launch day post (due Fri 23 May)
- Sharon: contact Priya about welcome video (due Fri 23 May)

3. Red flags

- No current blockers, but Marcus's briefing document (due Thu) is on the critical path for the 21 May tenant readiness deadline — any delay could affect launch date

4. Resourcing

- Hours to date: 33 hrs / 240 hrs total (13.75% burned)



Write a message...



Sonnet 4.6



Could be AI and can make mistakes. Please double-check responses.

The setup in Claude

Claude maintains memory across sessions — it knows the project, the people, the format and the preferences. No re-briefing needed each week.

Project Memory

- Weeknote format (4 sections, exact structure)
- ACME = 240hr project budget
- Resourcing shown as hours + % burndown
- Granola notes stored in the ACME folder
- Monday.com planning board is the task source
- Branded Word doc only on explicit request
- Always ask for hours before drafting
- Lithos brand fonts & colour palette

Tool Connections

Claude connects directly to Monday.com and Granola via MCP — reading live data, creating tasks and pulling meeting transcripts without copy-pasting.

What's next?

Closing the loop – from time tracked to invoice raised

Xero Integration

The next step is connecting Claude to Xero – allowing the system to:

- Read hours from Monday/Trackingtime/Claude
- Calculate fees against project rates
- Draft and raise invoices in Xero automatically
- Flag when budget thresholds are approaching

~2hrs

saved per week on admin

100%

invoice accuracy vs timesheet

1 click

from weeknote to draft invoice

Automation via Claude co-work using scheduled tasks

A note on this deck

This presentation was built by Claude.

Jonathan described the story, the brand and the structure. Claude wrote the content, designed the layout and generated the .pptx file.

That's not a parlour trick. That's the point.

What Claude did here

 Wrote all slide copy from a brief

 Applied Lithos brand colours and fonts

 Designed varied layouts — no two slides alike

 Generated the .pptx file programmatically

 QA'd for overflow, contrast and alignment

 Worked iteratively with Jonathan throughout

Humans set the direction. Claude handles the execution.

Questions

Using AI to automate the admin

we
are
LITHOS PARTNERS

