

BOS 11-Box Owner + Daily Summary System (v1)

Reference Backbone: `bos_master_loop_flowchart_11box_centered.pdf`

1) Objective

Create one secure operating structure where each BOS box has a dedicated owner/user, restricted access, and a daily summary workflow that rolls up to executive recipients.

2) Access Model (Hub-and-Spoke)

Hub (Executive Access Point)

- Single dashboard/login for leadership
- Visibility into all 11 boxes
- Receives daily consolidated digest

Spokes (Box-Level Users)

- One primary owner per box
- Optional secondary backup owner
- Access limited to assigned box only
- No cross-box file browsing unless explicitly approved

3) Role Definitions

1. ****Executive Admin****

- Full read access all boxes
- Approves permission changes
- Receives consolidated daily report

2. ****Box Owner****

- Read/write in assigned box
- Submits daily box summary
- Flags risks/escalations

3. ****Box Contributor****

- Limited edit in assigned box

- Cannot modify permissions

4. ****Read-Only Stakeholder****

- View only assigned boxes

5. ****Automation Agent (Per Box)****

- Runs scheduled checks/summaries
- Cannot access other box datasets

4) 11-Box Assignment Template

For each box define:

- Box Name
- Primary Owner
- Backup Owner
- Contributors
- Executive Recipient(s)
- SLA (response time)
- KPI Set
- Escalation Contact

Example Entry

- Box: Box 1 — Strategy/Demand
- Primary Owner: [Name]
- Backup Owner: [Name]
- Contributors: [Name(s)]
- Executive Recipients: Russ, Ops Lead
- SLA: 24h
- KPIs: Intake quality, cycle time
- Escalation: [Name]

5) Permission Matrix (Simple)

- ****Executive Admin:**** R/W all boxes + settings
- ****Box Owner:**** R/W own box only

- **Contributor:** Edit assigned tasks/docs only
- **Read-Only:** View assigned box only
- **Agent:** Read assigned box data + write summary output only

Policy: deny-by-default outside assigned scope.

6) Daily Box Summary Template (Required)

Each box submits by end-of-day:

1. **Completed Today**

- Task/Deliverable
- Status

2. **KPI Snapshot**

- KPI 1: value vs target
- KPI 2: value vs target

3. **Risks / Blockers**

- Issue
- Impact
- Needed decision/support

4. **Next 24-Hour Plan**

- Top 3 priorities

5. **Escalations (if any)**

- Severity
- Owner
- ETA to resolution

7) Consolidated Executive Digest (Auto-Generated)

Delivery Time

- Daily at fixed time (e.g., 6:00 PM local)

Digest Sections

1. Box-by-box progress highlights
2. KPI exceptions (red/amber)
3. Open escalations requiring executive action
4. Priority actions for next day

Delivery Recipients

- Russ
- Dedicated recipients per box (configurable)

8) Routing Rules

- Box-level summary goes to:
 - Box Owner
 - Backup Owner
 - Assigned Executive Recipient(s)
- Consolidated digest goes to:
 - Russ
 - Leadership distribution list

9) Cadence and Governance

- Daily: Box summary submission and digest distribution
- Weekly: Cross-box leadership review
- Monthly: Access audit + KPI threshold review

10) Implementation Steps (Fast Start)

1. Map all 11 boxes to owners
2. Create separate folder/workspace for each box
3. Apply role-based permissions (deny by default)
4. Configure per-box agent automation
5. Deploy daily summary template

6. Configure recipient routing list

7. Launch 7-day pilot and tune

11) Success Criteria

- 100% daily summary compliance
- Zero unauthorized cross-box access
- <24h response to high-severity escalations
- Executive digest delivered on time daily

12) Homebase Rule

Use the BOS 11-box centered flowchart as structural anchor.

Do not alter homebase source unless explicitly approved.

Create all operational updates as controlled add-on documents.