



FREE RESOURCE — ENCODING LOOP STARTER KIT

The 90-Day First Loop Roadmap

Three phases. Weekly checkpoints. Explicit kill criteria.

From the Encoding Loop Starter Kit — theaiaccountant.ai/encoding-loop-starter-kit

The point of the first ninety days isn't to encode the whole firm. It's to prove the loop runs on one vertical, accumulate enough corrections to encode the highest-frequency missing rules, and finish the quarter with a Champion who defends the role with numbers.

Three thirty-day phases. Weekly checkpoints. Explicit kill criteria so a vertical that isn't producing encodable signal doesn't quietly absorb a year.

Phase 1 — Days 1–30: Pick the vertical, set up capture

The work of this phase is structural, not analytical. By the end of week one the Champion is logging corrections every time the AI gets something wrong on the chosen vertical. By the end of week four they're seeing the first patterns.

Week 1 — Open the loop.

- **Day 1.** Owner and Champion sit together for 30 minutes. Run the Vertical Narrowing Worksheet against three to five candidate workflows. Pick the highest scorer. Write it at the top of the worksheet. No second loop until this one produces.
- **Day 2.** Open the Correction Capture Log in a shared location every reviewer can reach in two clicks. Pin it. Friction kills the loop in week one.
- **Day 3.** Champion drafts the first cut of the firm's vertical Claude project / system prompt. Doesn't have to be good. Has to exist. The first 30 corrections tell you what's missing.
- **Day 4.** Senior on the vertical does one job end-to-end with the AI tool, narrating what they're correcting and why. Champion logs every correction. Target: 8–12 rows on the first job.
- **Day 5.** Review the rows together. Confirm the "Why the AI was wrong," "Firm-specific rule it missed," and "Pattern key" fields are specific, not generic. Adjust the capture process if they aren't.

Weeks 2–4 — Capture, don't encode.

- Every job in the chosen vertical gets corrections logged in real time. Resist encoding yet. The Champion is gathering data, not fixing things. Premature encoding locks in noise as signal.
- Tag every row with a short Pattern key (e.g., `operating-line-draw`, `1099K-platform-fees`). The Times seen column shows you when a pattern crosses the encoding threshold.
- The Champion runs a 30-minute weekly check-in with the senior. Three questions only: Which corrections felt repetitive? Which ones surprised you? Which ones would you have caught regardless of AI?

Phase 1 numeric exit criteria (Day 30):

- ≥ 40 rows in the Correction Capture Log
- ≥ 3 distinct Pattern keys with Times seen ≥ 2

- 1 named vertical written into the worksheet decision box
- 0 rules encoded yet (this is deliberate — encode in Phase 2, not Phase 1)

Phase 2 — Days 31–60: Run the loop, accumulate corrections

The work of this phase is selection. You have data; not all of it is encodable. The Champion's job is to separate the patterns that pay off when encoded from the noise that doesn't.

Week 5 — Promote by Pattern key.

- Filter the Correction Capture Log by `Times seen ≥ 2`. Those are your encoding candidates. One-offs stay in the log as evidence but don't promote to the Backlog.
- Promote the top three Pattern keys to the Encoding Backlog. Don't promote more than three this week — encoding work is real work and you'll choke the loop if you queue too much.

Weeks 6–7 — Encode the first three.

- The Champion writes each encoded rule to its target: a Claude skill file, a prompt template, a client context file, or a referenced SOP. Each rule is one file or block — small, citeable, replaceable.
- The senior reviews each encoded rule before it goes live. Encoded methodology the senior wouldn't sign off on isn't methodology — it's guessing.
- Mark `Encoded? = Yes` in the Correction Log and `Status = Live` in the Encoding Backlog as each rule ships.

Week 8 — Watch the same workflow run again.

- The Champion logs corrections through week 8 normally. Sort the new rows by Pattern key: are the encoded rules sticking? If `operating-line-draw` was encoded in week 6 and shows up again as a correction in week 8, the encoding was wrong (or in the wrong place). Re-encode. This is the loop closing.

Phase 2 numeric exit criteria (Day 60):

- 80–150 cumulative rows in the Capture Log
- 3–6 encoded rules live in the firm's AI tools
- ≥ 1 case where an encoded rule prevented a recurring correction in week 8 (verifiable in the log)

Phase 3 — Days 61–90: Encode the rest, measure, defend the role

The work of this phase is reporting. The loop runs. The Champion's job is now to make its output legible to the rest of the firm — so the role isn't quietly absorbed back into client work the next

time billable pressure rises.

Weeks 9–10 — Encode the next batch.

- Promote the next four to six Pattern keys from the Capture Log to the Encoding Backlog. Encode them. Same process: senior reviews, Champion ships, status flipped.
- End of week 10 target: 7–12 encoded rules live against the vertical.

Week 11 — Measure.

- Pull two numbers:
 1. Corrections per job in the vertical, week 1 vs. week 11. If your encoded rules do work, this number is meaningfully smaller.
 2. Time on job in the vertical, week 1 vs. week 11. This is the lagging indicator. Expect it to follow the leading indicator by 2–4 weeks.
- If both numbers are flat: kill criteria triggered. The vertical isn't producing encodable signal, or the encoded rules aren't load-bearing. Re-score in the Vertical Narrowing Worksheet.

Week 12 — Defend the role.

- The Champion writes a one-page report: vertical chosen, correction volume, encoded rules with file paths, before/after numbers, what's queued for next quarter.
- Present it to the owner. The point isn't a status update. It's evidence that the role's product is real and accumulating. This is what makes Q2 happen — the firm extends the loop or names a second vertical, instead of quietly absorbing the Champion back into delivery.

Phase 3 numeric exit criteria (Day 90):

- 8–15 encoded rules live
- Corrections-per-job on the vertical down $\geq 25\%$ week 1 vs. week 11
- 1 one-page report delivered to the owner
- 1 named second vertical for Q2

Kill criteria — when to abandon this vertical and re-score

Any of these at any point in the 90 days is a re-score signal, not a sunk-cost reason to keep going:

- **Volume floor.** Fewer than 20 correction rows by end of week 4 — the workflow doesn't have enough volume to surface encodable signal in a quarter.
- **Pattern floor.** Fewer than three Pattern keys with Times seen ≥ 2 by end of week 5 — no repeatable signal even if volume is high.
- **Encoding stickiness.** An encoded rule shows up as a correction again in the same form within two weeks of going live — the encoded rule wasn't load-bearing, or it wasn't placed where the AI actually reads it.
- **Champion-time blowout.** The Champion spends more than 4–6 hours/week and most of it

on capture (not encoding) — the capture loop is broken or the vertical is too unstructured.

- **Senior unwilling.** The senior on the vertical won't review or sign off on encoded rules — the loop has no source of truth and will encode the Champion's guesses.

Killing a vertical isn't failure. It's the discipline that lets the next vertical get the attention this one wasn't going to repay.

What you finish the quarter with

Not a 97% tax agent. Something different and harder to copy.

A documented Correction Capture Log against one vertical. Eight to fifteen encoded rules — Claude skills, prompts, SOPs, client context files — that competitors can't replicate by buying the same AI tool. A measurable drop in corrections per job on the chosen workflow. A Champion who defends the role with numbers rather than enthusiasm. And one named second vertical to open in Q2.

A firm running its own encoding loop builds a moat that thickens every month. A firm waiting for the vendor-built agent generates the training data the vendor will eventually sell back to it. The difference in eighteen months isn't a benchmark point on a model release page — it's whether the work your team does still belongs to your firm.

You don't get there by shipping faster. You get there by encoding first.

Pairs with the QC Starter Kit (theaiaccountant.ai/qc-starter-kit). QC Kit catches the errors. The Encoding Loop turns the catches into firm methodology. Same loop, different surface.