

How a CBDO stopped being the department bottleneck — and set a target of **13 new locations** without growing the team.

5 departments. Scouts across Thailand. 7 disconnected tools. 1 head holding all statuses, standards, and risks in his head. A case study on how our client — CBDO (Location Development / BD) responsible for managing five departments including scouts and managers — replaced manual oversight with WORKERON.ai and got back to strategy.

13	2–3×	5
New locations targeted · zero new headcount	Meeting time reduction · 90 → 30 min	Departments managed · 1 operations layer

The before-state

"Strategic initiatives keep sinking under daily operational noise. I spend the whole day on reminders and status checks — and by the time I surface, the meeting has gone 90 minutes and nothing concrete came out of it."

What CBDO was managing manually before WORKERON.ai:

- Tasks scattered across ClickUp, the internal Portal, Telegram, and personal Obsidian notes — no single view
- Deadlines missed or pushed back without accountability, tracked manually by a human assistant
- Meetings running 90 minutes because managers arrived unprepared — no standard pre-call format
- Firefly and ChatGPT tried for meeting summaries — described as "non-informative," no decisions or risks captured
- Google Calendar, Google Drive, and Slack running in parallel with no integration into the task layer
- Employee failures and standards violations logged ad hoc — no factual evidence base for management decisions

Why being the bottleneck doesn't scale

"I'm the only one who knows where everything stands. Standards are in my head. Risks are in my head. The moment I'm in a meeting or traveling, the department loses visibility. That's not a system — that's a dependency."

The target — 13 new locations, same team size — isn't achievable if CBDO stays in every status loop manually. The challenge isn't effort. It's that the department has no operational layer that runs without him. Every missed deadline, every unprepared manager, every lost task in Telegram requires him to intervene. WORKERON.ai was brought in to be that layer.

Day-to-day · 4 WORKERON use cases

01 Task Hub — single window for the whole department

"I need to open one thing and see, in 2–3 minutes, where the fires are and who is responsible. Not five tools. One view."

Replaced: manually checking ClickUp, the internal Portal, and Telegram threads to piece together department status. Now: all tasks are ingested into a unified model — owner, status, deadline, source link — with two-way sync back to the original system. Filters for Fires/Overdue, Strategic Initiatives, and By Owner are pre-built.

02 Meeting Intelligence — Management Summaries, not transcripts

"I don't need a transcript. I need to know: what was decided, who owns what, and what's going to block us next week. The tools I tried before couldn't do that."

Replaced: Firefly/ChatGPT summaries that captured dialogue but missed decisions and risks. Now: each meeting produces a structured Management Summary — decisions made, action items with owners and deadlines, Red Book risks — and proposed tasks are pushed directly into the Task Hub after CBDO confirms.

03 Red & Black Books — evidence-based accountability

"Right now a human assistant tracks who missed what. It's manual and subjective. When I need to make a management decision about someone, I want facts — not impressions."

Replaced: a human assistant logging failures ad hoc with no structured format. Now: the Red Book surfaces high-priority burning projects requiring immediate attention; the Black Book automatically records missed deadlines and standards violations — building a factual evidence base over time, not a running impression.

04 Morning & Evening Briefings — the daily operational rhythm

"I want to start the day knowing exactly what needs my attention and why — and end it knowing what moved, what's stuck, and what I need to flag tomorrow."

Replaced: CBDO manually scanning tools each morning to build a mental picture of the day. Now: a Morning Plan brief explains why specific tasks are prioritized today; an Evening Recap surfaces what closed, what is stuck, and new risks — without CBDO having to ask.

From bottleneck to operational layer

Need	Manual stack	WORKERON.ai
Department visibility	7 tools, mental model only	Single Task Hub, pre-filtered views
Meeting output	Non-informative transcripts	Decisions, owners, risks — structured
Accountability tracking	Manual assistant, no pattern data	Black Book — factual, automatic, timestamped

Need	Manual stack	WORKERON.ai
Follow-up on stale tasks	CBDO sends reminders manually	Agent messages owner, escalates to CBDO if needed
Standards compliance	Stored in CBDO's head	Standards Keeper — documented, monitored
Strategic focus	Sinks under daily operations	Strategic Initiatives surfaced separately

The vision - A department that runs on standards, not on CBDO

"The goal is for the entire department to operate according to established standards — not because I'm enforcing them personally, but because the system makes compliance visible and deviation impossible to hide."

The roadmap runs in phases. Phase 1 establishes the Task Hub and Follow-Up Engine — 90%+ of department tasks visible in one place, stale tasks auto-chased before CBDO has to intervene. Phase 2 deploys Meeting Intelligence and the mandatory Manager Report Template: four sections, filled before every call, or the agent flags missing data and suggests rescheduling. The Standards Keeper captures CBDO's criteria in free form, updates the Google Docs standard library, and monitors manager compliance over time. The end state: CBDO opens a dashboard, identifies fires in 2–3 minutes, and spends the rest of his day on the 13-location target — not on coordination.

Deployment status: P1 Complete, P2 in progress.

Honest gaps

90% task capture requires manager behavior change first.

The Task Hub only works if tasks actually live in the connected systems. Right now, some scouts and managers keep work in personal messages or Obsidian notes that the agent can't reach. Until input discipline is established across the team, the Hub will have blind spots — and the Follow-Up Engine will miss tasks it doesn't know exist.

Pre-call report compliance is a culture problem, not a system problem.

The Manager Report Template works when it's filled. The agent will flag missing data 30 minutes before a meeting and suggest rescheduling — but whether managers actually adopt the format depends on CBDO enforcing the standard, not on the technology. The system provides the signal. The management decision is still his.

100% approval required during pilot — slows autonomous execution.

Every risky action requires CBDO's manual confirmation during this stage. That's the right call for a pilot, but it means the time savings from automation are partially offset by the approval queue. As trust is established action by action, the guardrails will be calibrated to allow more autonomous execution.

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