

CASE STUDY · JUNE 2026 · GROWTH-STAGE TEAM × AI CHIEF OF STAFF

How a Chief of Staff stopped being the manual sync layer — and gave the founder *real-time visibility* across 30+ people.

30+ people. 5 communication channels. 1 Chief of Staff holding it all together manually. A case study on how our customer replaced fragmented coordination tools with WORKERON.ai — and shifted from administrative overhead to strategic operations.

30+

TEAM MEMBERS · 1 COS

5 → 1

CHANNELS → UNIFIED INBOX

150+LINKEDIN COMMENTS
AUTOMATED

The before-state

Our knowledge base is basically a table of links. Important context is buried in personal accounts, random Drive folders, and chat threads. By the time I find what I need, I've already lost 20 minutes.

What the client as Chief of Staff was managing manually before WORKERON.ai:

- Slack, Telegram, and email running in parallel — important founder mentions lost in threads
- Task tracking split across Google Sheets, ClickUp, and Miro — no single source of truth
- Meeting notes taken manually — summaries and action items written by hand and re-distributed
- Knowledge stored in personal accounts and disorganized Drive folders ("a table of links")
- HR tracking — vacations, sick leave, birthdays — in manual spreadsheets, often forgotten
- Candidate sourcing by hand — reviewing 150+ LinkedIn comments per open role

Why manual coordination broke at 30 people

I'm spending most of my time syncing people with information and information with tools — not on actual strategic work. As the team grows, the coordination overhead just scales with it.

The problem isn't that any single tool is broken. It's that there are too many of them. The Chief of Staff had become the human glue between Slack, Telegram, ClickUp, Sheets, and Miro — manually pulling context from each to keep the founder informed. At 10 people this is manageable. At 30, it becomes the job.

Day-to-day - 4 WORKERON use cases

01

Unified Inbox Orchestrator

"I need one place where I can see everything the founder needs to know — urgent mentions, follow-ups, unresolved tasks — without opening five apps to piece it together."

All incoming messages are classified (urgent / task / FYI), surfaced in a single inbox, with draft responses ready for approval.

02

Automated Meeting Intelligence

"After every meeting I'm rewriting notes, pulling out action items, and figuring out who owns what. It's 30–45 minutes per meeting that could be used for something else."

Self-hosted transcription → automatic summary → action items extracted and assigned → CoS reviews and confirms before anything is sent.

03

Knowledge Retriever

"Someone asks me a question about a decision made three months ago. I know the answer is in Drive somewhere — but finding it takes longer than just answering from memory."

A RAG-based retrieval layer answers specific questions from structured company documents — with source citations, not summaries from memory.

04

HR & Recruiting Operator

"Sourcing candidates means scrolling through 150+ comments on a LinkedIn post, one by one. And then I still have vacation tracking in a spreadsheet that nobody updates consistently."

Automated candidate discovery with relevance scores, centralized employee records, and automated HR ritual reminders — with human approval before outreach sends.

From manual synchronization to operational layer

Need	Manual stack (Slack + Sheets + ClickUp + Miro)	WORKERON.ai
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Communication visibility	5 apps, no prioritization	Unified inbox, classified by urgency
Meeting output	Manual notes, manual routing	Auto-transcript → action items assigned
Knowledge retrieval	"Table of links" in Drive	Source-based Q&A with citations
Founder reporting	Manual status updates	Live Gantt view, change tracking
HR & recruiting	Manual spreadsheets, LinkedIn scrolling	Centralized records, scored candidate lists
Sensitive data	Flows through generic SaaS	Self-hosted, confidentiality-flagged

The vision - A full HR and operational layer

The goal isn't to automate me out of the job — it's to get me out of the administrative routine so I can actually focus on what the founder needs strategically. The system should handle the coordination. I handle the judgment.

Phase 2 extends the operational layer into HR. Each employee gets a centralized record — roles, contacts, key dates, personal details — that persists and grows over time. Recruiting shifts from manual scanning to a prioritized candidate list with relevance scoring and outreach drafts ready to review. A Phase 3 onboarding bot replaces the static "table of links" with an interactive guided experience for new hires. All of it runs inside the client's own infrastructure.

Deployment status: Phase 1 live — Phase 2 in progress.

Honest gaps

!	<p>Document access gaps surface during rollout.</p> <p>Some employee files and sensitive documents have access restrictions that the agent can't get around. The system flags these — generating a report of what it can't reach — but some knowledge retrieval queries come back incomplete.</p>
!	<p>Human-in-the-loop boundary still being defined.</p> <p>The rule is clear — no external message sends without CoS approval. But calibrating which internal actions require explicit sign-off versus silent execution is still being worked out.</p>

**Context quality depends on how Drive is structured.**

The Knowledge Retriever is only as good as the documents it can index. Until the underlying structure is cleaned up, some answers will be incomplete.

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