

PRODUCT OVERVIEW

Chief Agent Officer.

One conversation. A coordinated team of agents behind it, working inside the tools your business already runs on.

WHAT THIS IS

Your point of command

You send the objective. Your Chief Agent Officer plans the work, delegates it to specialist agents, checks the result and brings it back for your approval.

PREPARED FOR

Founders and operators evaluating the Chief Agent Officer

PREPARED BY

Zero To Agent

DATE

September 2026

THE SHORT VERSION

Text your business. Get the morning back.

A Chief Agent Officer (CAO) is the coordination layer for the AI in your company. You talk to it the way you would text a chief of staff. It reads your inbox, your calendar, your CRM and your project tools, works out what needs doing, and hands each piece to the right specialist agent.

The specialists do the work: research, drafting, updating records, chasing follow-ups, checking a drawing against an email. The CAO sequences them, holds the context between them, and stops at the points you have marked for a human decision. You see the finished result and the decision waiting on you, not the forty steps in between.

Not a chatbot

A chat assistant stops at the draft. A CAO carries the work into your tools, records what it did, and comes back with the next thing. The conversation is the control surface; the system behind it does the job.

What you do

- Send the objective in plain language.
- Approve, redirect or decline what comes back.
- Set the boundaries: what runs on its own, what stays a draft, what waits for you.

You direct. The system coordinates.
Nothing sensitive goes out without you.

THE OPERATING RULE

1 thread

One conversation is the whole interface. Slack, email, WhatsApp or a message thread.

13 workflows

Pre-built agents ready to configure, from lead response to weekly reporting.

3 layers

CAO, specialist lanes and worker agents, all under your direction.

What it does

- Reads the connected systems and builds the brief.
- Breaks work into steps and routes each to a specialist.
- Executes inside your tools, logs the result, and reports back.

Why the coordination layer matters

Access to AI is easy. Putting it to work is the hard part: choosing where to start, connecting the tools and making it stick. The CAO turns individual AI capabilities into a system your team can direct day to day.

WHERE IT LIVES · 01

In the thread

Slack, email, WhatsApp or a message thread. You send a line; the answer comes back in the same place.

WHERE IT LIVES · 02

In your tools

The work happens inside Gmail, the CRM, the project record and the calendar. Nothing is copied by hand.

WHERE IT LIVES · 03

In your brief

A morning brief, an end-of-day summary or a weekly operator report, at the cadence you choose at intake.

ONE MORNING

8:00 AM. Three texts. Three things handled.

An example morning at a construction firm, shown as it would play out in the thread. The client changed a kitchen drawing overnight. The electrician arrives tomorrow. The owner sends three short texts and makes one decision.

CHIEF AGENT OFFICER · MESSAGES

Good morning. What needs my attention today?

Three things.

A client reply is waiting in Gmail. The electrician is booked for tomorrow. And the client moved the kitchen island in revision 02.

That last one needs your approval.

Show me the island.

Kitchen plan · Revision 02

Island relocated. Checked against the client's email of 7:48 AM.

The revised location matches the client's email. Tomorrow's electrician visit needs the approved plan.

Approved. Send it to the team.

Done. Posted to #site-visit in Slack and updated the Procore record with revision 02.

Next: the client reply is drafted for your review.

Systems touched

Gmail for the client's request. Google Calendar for the site visit. Procore for the drawing and the record. Slack for the team. Four tools, one thread, no copying between them.

8:00:00**Your morning, in focus.**

The first text. The CAO reads the inbox, the calendar and the project record, then names the one decision holding up the team.

8:01:04**The client moved the island.**

The request came in by email at 7:48. The drawing lives in Procore. The CAO puts them side by side.

8:01:31**The CAO checks the drawing.**

It compares revision 02 against the client's words, confirms the match, and drafts the team update before you have read the email.

8:02:02**Review it. Approve the plan.**

One line back in the thread is the approval, and the record of it.

8:02:40**Back to your morning.**

The team has the approved plan in Slack. Procore holds the decision. The brief moves to the next thing.

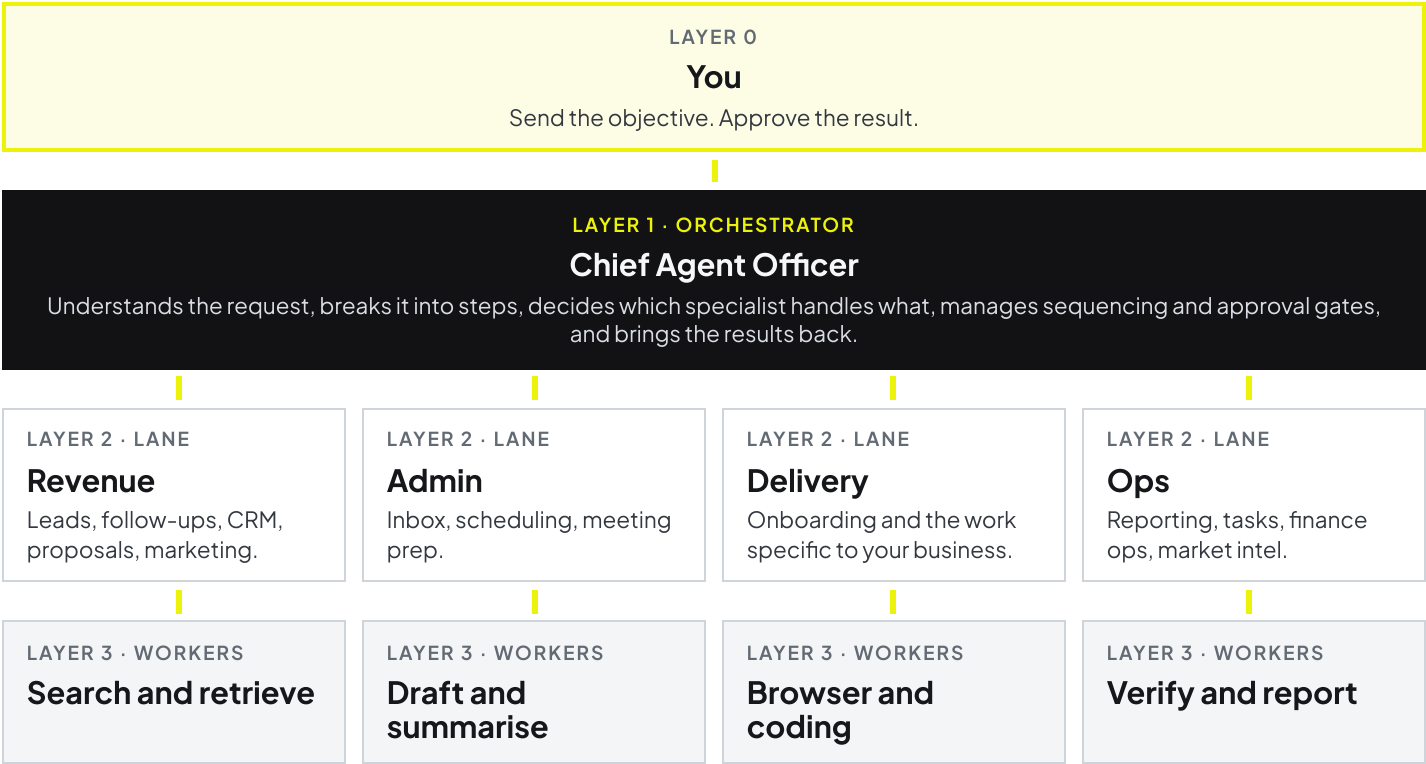
Where the human sits

The approval. The CAO could read, compare and draft on its own. Sending an approved plan to the crew waited for the owner, because that is where the build plan put the gate.

HOW IT IS STRUCTURED

A company of agents, with one point of direction.

Businesses run on specialist roles with shared context. The CAO is organised the same way: you at the top, one coordinator under you, the four lanes your workflows are grouped into, and worker agents that do the task-level work.



LAYER	WHAT IT DOES	IN THE MORNING ABOVE
Front desk	Receives your messages and inputs. Understands context and intent before anything else happens.	Reads "What needs my attention today?" and knows which systems to check.
Orchestrator	Breaks work into steps, assigns specialists, manages sequencing and the approval gates you set.	Finds three items, ranks the island as the decision, and holds the Slack post until you approve.
Specialist lanes	Four lanes, Revenue, Admin, Delivery and Ops, the same ones the workflow library on page 6 is sorted by.	Delivery checks revision 02 in Procore against the email. Admin drafts the client reply.
Worker agents	Task-level agents that search, draft, summarise, verify and report back up the chain.	One worker compares the drawing to the email. Another posts to #site-visit.

Memory and reusable skills

The next task starts with what the system already knows about your clients, your tools and your preferences. Each agent is a skill with its own setup inside it, so adding a general agent is a configuration step, not a project.

WHERE IT SITS

From better answers to a company of agents.

AI capability has moved through seven layers. Each one is still useful for the job it does best. The CAO is the top layer: it coordinates the others, so you choose the right level for the work without managing each tool yourself.

LAYER	EXAMPLES	WHAT IT DOES	USE IT WHEN
01 Foundation models	ChatGPT, Claude, Gemini	Think. Draft, summarise, brainstorm, explain.	You need help thinking.
02 Workflows	Zapier, Make, n8n	Repeat. A fixed trigger, defined steps, a handoff.	You repeat a known process.
03 Single agents	Bounded tasks with tools	Execute. Plan the steps, use tools, return the work.	You need a task completed.
04 Browser agents	Web retrieval and operation	Operate. Find information, move through sites, complete online tasks.	The work lives on the web.
05 Coding agents	Software projects	Build. Write, debug, test and ship changes.	The work is inside software.
06 Multi-agent systems	Coordinated specialist teams	Collaborate. Parallel specialists on cross-functional work.	Several roles must work together.
07 Chief Agent Officer	Your AI company	Orchestrate. One point of direction over all of the above.	You want to direct the system, not operate it.

The execution gap

Ask a chat assistant to "write a follow-up email" and the draft is done. The follow-up is not. Still on your plate: copy it into Gmail, format it, review and send, update the customer record, remember to follow up. A better answer leaves the same five handoffs. Connected agents move the work into your tools.

When a workflow meets an exception

Fixed workflows are strong when the path is defined. An unexpected input needs a decision: a rule, a person, or an agent that can work out the next step. The CAO handles the exception, and escalates to you when the build plan says it should.

Two paths open now

AI-assisted: more tools, more noise, the same bottlenecks, still human-intensive. AI-augmented: better decisions, faster execution, more output per person, human-commanded. The difference is whether the AI is connected and directed.

A map, not a ladder

Foundation models still think. Workflows still repeat. Single agents still execute. The CAO does not replace them. It gives them one direction, shared context and a place to report.

THE GENERAL AGENT LIBRARY

Thirteen workflows, ready to configure.

General agents are pre-built. During intake you rank a shortlist of workflows by impact on your week, and we configure the top three from this library for your tools and your team. Custom workflows are Premium builds.

LANE	WORKFLOW	WHAT THE AGENT DOES
REVENUE	Lead response and qualification	Capture, qualify and route inbound interest before it goes stale.
REVENUE	Follow-ups and pipeline management	Keep next steps, reminders and deal movement from slipping.
REVENUE	CRM updates and data hygiene	Clean records, update stages and keep notes current.
REVENUE	Proposal and document generation	Draft, package and track client-facing documents.
REVENUE	Marketing execution	Plan, draft, post, repurpose and report on marketing work.
ADMIN	Inbox and communication handling	Triage, summarise, draft and surface high-impact messages.
ADMIN	Scheduling and calendar coordination	Coordinate bookings, conflicts, reminders and reschedules.
ADMIN	Meeting prep and research	Prepare context, questions and follow-up materials.
OPS	Reporting and weekly summaries	Turn scattered activity into a clean operator brief.
OPS	Task tracking and internal coordination	Route work, chase blockers and keep owners aligned.
OPS	Finance ops and reminders	Track invoices, reminders, collections and payment follow-up.
OPS	Research and market intel	Monitor competitors, prospects, sources and opportunities.
DELIVERY	Customer onboarding and success	Move customers through onboarding, checkpoints and renewals.

Included in every build

Memory across workflows. QA and verification of the work before it reaches you. Approval controls for sensitive actions.

Something specific to your business

A workflow that does not fit the menu becomes a custom agent: a bespoke skill built for that one process, with the same controls, memory and reporting as the general library. Custom builds are scoped per engagement.

PICKING THE THREE · 01

Highest impact on the week

The task that eats the most hours, or the handoff that gets missed most often. Intake asks how often it happens and where it gets stuck, not for a wish list.

PICKING THE THREE · 02

A checkable result

A clear input and an output someone can look at and approve: a brief, a drafted reply, an updated record, a booked slot.

PICKING THE THREE · 03

A connected system

The tool the workflow lives in is on page 7 and the team is willing to connect it. That is what lets the first build go live in weeks.

CONNECTED TOOLS AND CONTROLS

Works with the tools you already use.

Google Workspace, Monday and, where you use it, GoHighLevel connect today. Other systems are scoped integration work, confirmed at intake before anything is built.

CONNECTED TODAY Google Workspace Gmail, Calendar, Drive, Docs, Sheets	CONNECTED TODAY Monday Push and pull workstream updates on your boards	CONNECTED · OPT-IN GoHighLevel CRM, conversations, calendars, pipelines	SCOPED INTEGRATION Microsoft 365 Outlook mail and calendar
SCOPED INTEGRATION Slack Channels, DMs, approvals, internal updates	SCOPED INTEGRATION CRM HubSpot, Salesforce, Pipedrive	SCOPED INTEGRATION Procore · Buildertrend Construction project records and drawings	SCOPED INTEGRATION Notion · Airtable Docs, databases, SOPs, operational tables
SCOPED INTEGRATION Project management Asana, ClickUp, Linear, Trello	SCOPED INTEGRATION Meeting recorders Fireflies transcripts, summaries, action items	SCOPED INTEGRATION Finance Stripe, QuickBooks, Xero	SCOPED INTEGRATION Web and commerce Webflow, WordPress, Shopify
AUTONOMY · OPTION 1 Draft everything first The CAO prepares the work, then waits for explicit approval before anything leaves the thread.	AUTONOMY · OPTION 2 Act on low-risk tasks Routine work runs on its own. Anything sensitive comes back as a draft for you to approve.	AUTONOMY · OPTION 3 Autonomous with guardrails The CAO acts wherever the build plan allows and escalates the exceptions.	

CONTROL	YOUR CHOICES	SET DURING
When it is unsure	Ask first. Pause. Proceed and send a summary.	Intake
Approval gates	Which actions always wait for a person: sending to clients, posting to the team, changing a record of truth, spending money.	First build plan
Where it talks to you	Slack, email, both, WhatsApp, or a dedicated message thread.	Intake
Its own inbox or yours	A separate identity that reports to you, or connected access to your accounts with the permissions you grant.	Onboarding
Reporting style	Morning brief, end-of-day summary, weekly operator report, or only when something needs you.	Onboarding

Who decides what it can do

You do. The build plan defines what can run automatically, what stays a draft and what needs a human approval. Every action the CAO takes is logged against the workflow it belongs to, so you can see what ran, what it touched and what it waited on.

WHAT YOU ARE GETTING

Two ways to start. One system underneath.

Both packages run the same Chief Agent Officer, the same controls and the same onboarding. The difference is whether the build goes beyond the general library into custom agents and hardware, both scoped per engagement.

PACKAGE

Essentials

Three general agents, picked from the library on page 6 and configured for your tools, your team and your approval rules.

- Chief Agent Officer coordination layer
- Three general agents from the library
- Connected tools scoped at intake
- Approval gates and autonomy level set with you
- Onboarding and a first live workflow
- Runs on hardware you already own

PACKAGE

Premium

Everything in Essentials, plus custom agents for the workflows the library does not cover and hardware setup where you need it. Both are scoped per engagement.

- Chief Agent Officer coordination layer
- Three general agents from the library
- Custom agents, scoped per engagement
- Hardware setup, scoped per engagement
- Approval gates and autonomy level set with you
- Onboarding and a first live workflow

SCOPE	WHAT IS INCLUDED	WHAT IT MEANS FOR YOU
IF SELECTED	Inbox and communication handling	Triage, summaries, drafts and the messages that need you, when it is one of the three agents you pick.
IF SELECTED	Scheduling and calendar coordination	Bookings, conflicts, reminders and reschedules, when it is one of the three agents you pick.
IF SELECTED	Meeting prep and research	Context, questions and follow-up materials for each meeting, when it is one of the three agents you pick.
IF SELECTED	Proposal and document generation	Client-facing documents drafted, packaged and tracked, when it is one of the three agents you pick.
PLATFORM	Memory across workflows	The system keeps what it learns about clients, tools and preferences.
PLATFORM	QA and verification	Work is checked before it reaches you or your team.
PLATFORM	Approval controls	Sensitive actions wait for a person, every time.

What is customisable

Tools and integrations connected. Autonomy level, supervised or hands-off. Approval gates for specific actions. Its own inbox or connected to yours. Communication and reporting style. Which functions are emphasised. Workflow structure per your business.

What stays fixed

Nothing sensitive leaves without a person. Every action is logged to its workflow. The conversation is the interface. The first build is one real workflow, scoped with you, before anything scales.

GETTING STARTED

Build around one real workflow.

We work through the scope with you, connect the right tools and help your team get comfortable directing the system. The first build is deliberately narrow: a recurring task with a clear input and a result someone can check.

01

Tell us where work gets stuck.

Use the intake to share your current tools, recurring tasks and the handoffs that slow your team down. It takes about fifteen minutes and becomes the brief for the build.

02

Define the first build.

Agree on the workflow, the connected systems, the specialist roles and the points where a person reviews the work. This is where the approval gates get written down.

03

Put it to work with your team.

We help with implementation and onboarding, then refine the workflow around what your team learns in the first weeks of running it.

EXAMPLE · INVESTMENT AND RELATIONSHIPS

Speed and follow-through.

Diligence research. Investor reports. Relationship follow-ups that go out on time.

EXAMPLE · SALES AND ACCOUNTS

Structure and consistency.

Organised wholesale accounts. Weekly contact reminders. A clear outreach process.

EXAMPLE · FINANCE AND ADMINISTRATION

More time for the decisions.

Receivables and payables follow-up. Scope-of-work drafting. Proposal and RFP support.

Is this another chatbot?

You interact through a conversation, but the work behind it is coordinated across agents and connected tools. The CAO plans, delegates and brings the results back.

Do we need to replace our existing tools?

The starting point is the software your team already uses. We scope which connections the first workflow needs and confirm what each one supports.

Who decides what it can do?

You do. The build plan defines what can run automatically, what stays a draft and what needs human approval. Those boundaries depend on the workflow.

Where should we start?

Choose a recurring task with a clear input and a result someone can check. A morning brief, a client follow-up or a drawing revision like the one on page 3 are useful examples to bring to intake.

What we need from you

Fifteen minutes on the intake. Access to the tools the first workflow touches, at the permission level you choose.
One person who can approve the work in the first weeks.

What the first weeks look like

We suggest running the first workflow draft-first while your team gets used to directing it. Approvals happen in the thread. Once results are steady, you decide which steps run on their own.

YOUR NEXT STEP

What would you take off **your plate**?

Bring us the workflow. We will help you scope the first build. The intake is the fastest route; a conversation first is fine too.

START WITH ONE OF THESE

01

A task that takes too much time.

The weekly report, the inbox triage, the CRM clean-up that never gets done.

02

A handoff that keeps getting missed.

The follow-up after a call, the record that should have been updated, the reminder no one sent.

03

A decision buried in scattered information.

The client email, the revised drawing and tomorrow's calendar, in three different tools.

FASTEST

Start your CAO intake

Share your tools, recurring tasks and where work gets stuck. It becomes the brief for the first build.

zeroagent.com/cao-intake

SEE IT

Watch the walkthrough

The interactive presentation and the film of the morning on page 3, on the product page.

zeroagent.com/cao

GO WIDER

Map the full business

The Agentic Adoption Plan reviews every function before implementation. The CAO is the foundation; the plan is where we build the full system.

zeroagent.com/audit-demo

What happens after intake

We read your answers, come back with a proposed first workflow, the connections it needs and the approval gates we recommend. You decide the package and the autonomy level. Then we build.

Zero To Agent

We help companies take their business from zero to agentic: turning AI capability into work that moves the business forward, with your people directing it.
zeroagent.com

Prefer to talk it through first?

Book a conversation from zeroagent.com. Bring one real example: the task, the tools it touches and who signs off on it today. Twenty minutes is usually enough to know whether it belongs in the first build.