

FREE GUIDE · 2026

The AI Coworker Playbook

Not a tool. A hire. A practical playbook for running your business from Slack — with an AI coworker that actually does the work.

simonhogben.com

This is not another AI hype guide

Most AI guides tell you what is theoretically possible. This one shows you what actually works, right now, for people running real businesses.

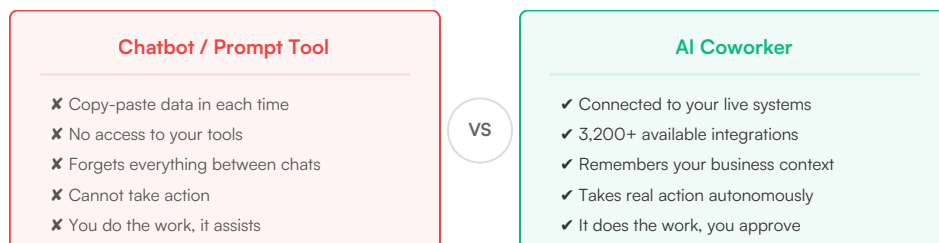
Imagine running a small agency. No big team. No investors. Just you, a handful of part-time staff, and an AI coworker that handles the operational load of three to four extra employees.

That is not an exaggeration. Every workflow in this playbook is something you can use daily. Email triage, client reporting, content across multiple platforms, CRM management, ad campaign analysis, document creation, outbound sales sequences — all handled by an AI that sits inside your Slack workspace like any other team member.

The tool at the centre of this playbook is called [Viktor](#). It is not a chatbot, not a prompt tool, not a glorified autocomplete. Viktor is a managed AI employee — and it lives inside Slack. You message it the way you would message any team member, and it goes away and does the work. It connects to over 3,200 integrations and operates autonomously. You review and approve.

But here is what really sets it apart: **it remembers everything**. Every conversation, every preference, every client detail, every correction you make — it all compounds. After a few weeks, your AI coworker knows your business, your tone of voice, your clients, and your processes. It is not starting from scratch each time. It is getting smarter every day.

What makes an AI coworker different?



The difference is **integration and autonomy**. An AI coworker connects to your real business systems — email, calendar, CRM, analytics, ad accounts, documents — and operates inside them. It reads live data, drafts emails, creates reports, manages contacts, publishes content, and runs scheduled tasks. It does the work. You review and approve.

Like a new hire that already knows your entire stack. Except it costs a fraction of the price, never forgets a task, and gets smarter every week.

SOUND FAMILIAR?

You are probably already using AI — ChatGPT, Claude, Copilot. You are also probably still doing the work. Copying data in, pasting results out, switching tabs, re-explaining context every time. An AI coworker is different: it connects to your live systems and takes action.

Real output, not just text

Viktor does not just give you suggestions. It **ships deliverables**. PDFs your clients can read. Google Sheets with live formulas. Campaign reports with real data. Google Docs formatted and shared to the right folder. WordPress articles published to the live site. It produces the actual work product — not a draft you then have to rebuild somewhere else.

THE REAL DIFFERENCE

Other AI tools	AI coworker
Tells you how to audit your ad spend	Audits it. Hands you the PDF.
Summarises your meetings	Creates the tasks, sends the follow-ups, updates the CRM
Writes the code. You figure out the rest.	Builds it, ships it, sends you the link
Follows rules you write	Figures out what needs automating and does it

Slack, Notion, and Google Drive: the foundation

Before we get into specific workflows, it is worth understanding the structure that makes everything work. An AI coworker is only as powerful as the knowledge layer it connects to.

Slack as your command centre

Your AI coworker lives in Slack. The way you structure your workspace determines how effectively it can operate. Here is the channel architecture that makes everything click:

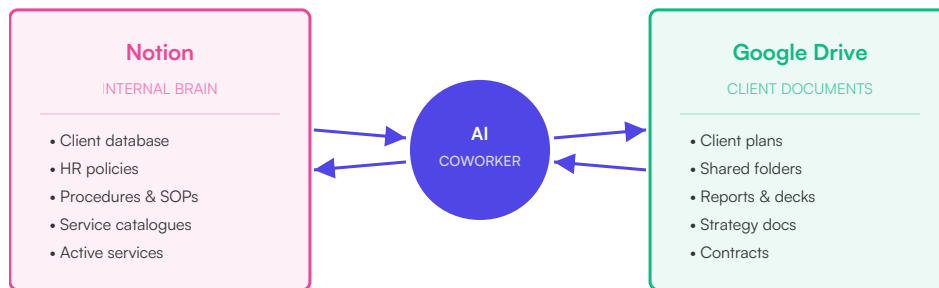
CHANNEL TYPE	EXAMPLES	WHAT HAPPENS HERE
Client channels	#client-jones, #client-smith	One channel per client. All updates, tasks, and discussions in one place. The AI has full context per client.
Service channels	#seo, #ads, #websites	Cross-client work by service type. SEO updates, ad campaign alerts, website changes across all clients.
Monitoring	#cloudways, #service	Server alerts, support tickets, and system notifications flow here. The AI filters and escalates.
Operations	#general, #tasks, #finance	Team updates, task management, and internal coordination. The AI posts daily summaries here.

When your AI coworker sits in every channel, it builds a complete picture of your business. Ask about a client and it pulls context from their channel, their Drive folder, their CRM record, and their analytics — all because the information is organised.

PRO TIP

Create a dedicated **#tasks** channel with a pinned task list. Message the AI in plain English — "add a task for Ed to update the Smith proposal by Friday" — and it creates, assigns, and tracks it. No project management tool needed for day-to-day coordination.

Notion as your internal brain



NOTION IS YOUR INTERNAL BRAIN. GOOGLE DRIVE IS YOUR CLIENT-FACING DOCUMENT LAYER. THE AI COWORKER CONNECTS THEM.

Notion becomes your single source of truth. Your AI coworker reads and writes to it constantly:

Client database

Every client, their active services, linked systems, contact details, and status — all in one structured database the AI can query instantly.

Operational knowledge

HR policies, SOPs, internal procedures — stored once, referenced automatically whenever the AI needs context for a task.

Living memory

Unlike a chatbot that forgets everything between sessions, your AI coworker saves learnings, preferences, and best practices that make it smarter over time. Viktor calls these "skills" — persistent knowledge it builds about your business.

Google Drive as your document layer

Every client gets a shared folder. The AI coworker creates, organises, and maintains documents inside it:

- **Client plans** — native Google Docs with business overview, active services, current strategy, and key preferences
- **Reports and audits** — performance reports, SEO audits, campaign reviews — all created as shareable Google Docs
- **Contracts and proposals** — professional documents formatted with native Google Docs styling, ready to share via link
- **Automatic organisation** — files go in the right folder, named consistently, linked back to the Notion client record

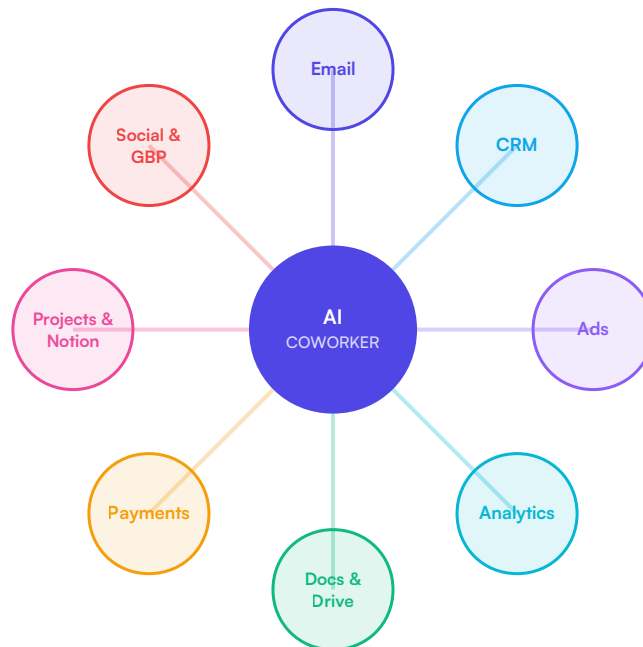
THE DIFFERENTIATOR

When you ask your AI coworker to write a client plan, it pulls the client's details from Notion, checks their analytics in GA4, reviews their ad performance in Google Ads, and produces a formatted Google Doc in their shared Drive folder — all in one step. No copy-pasting between tabs. No re-explaining context. It already knows your business.

THE CONNECTED ECOSYSTEM

3,200+ integrations, one coworker

This is what separates an AI coworker from every other AI tool. It does not just connect to one thing — it connects to everything, and cross-references data across your entire stack.



YOUR AI COWORKER SITS AT THE CENTRE OF YOUR ENTIRE BUSINESS STACK

CATEGORY	TOOLS	WHAT THE AI CAN DO
Email	Gmail, Outlook	Triage, draft replies, send (with approval), archive, label
CRM	Zoho, HubSpot, Salesforce	Create/update contacts, manage pipeline, generate reports
Advertising	Google Ads, Meta Ads	Performance analysis, search term mining, budget optimisation
Analytics	GA4, Search Console	Traffic analysis, ranking reports, content gap identification
Documents	Google Docs, Sheets, Drive	Create, edit, format, share documents and spreadsheets
Knowledge	Notion	Client database, internal wiki, operational procedures, living memory
Payments	Stripe, PayPal	Transaction lookups, revenue reports, failed payment alerts
Projects	Asana, Notion, Trello	Create tasks, track progress, generate status updates
Social	Google Business Profile	Publish posts, respond to reviews, manage locations
Outreach	Smartlead, Mailchimp	Campaign setup, sequence writing, response classification

The power integrations

Viktor has over 3,200 available integrations. These are the ones that deliver the most immediate value:

Google Workspace (Gmail, Docs, Sheets, Drive, Calendar)

The single most impactful connection. Email triage, document creation, spreadsheet generation, calendar management, and file organisation — all from one integration. If you only connect one thing, make it this.

Google Ads + GA4 + Search Console

The analytics trio. Your AI coworker cross-references ad spend with traffic data and search rankings to produce reports that would take hours to build manually. Campaign reviews, search term mining, and SEO audits — all from live data.

Notion

Your AI coworker's memory. Client databases, SOPs, internal processes — Notion becomes the knowledge layer that makes every other integration smarter. The AI reads from it, writes to it, and learns from it.

CRM (Zoho, HubSpot, Salesforce)

Data hygiene on autopilot. Enrichment, deduplication, pipeline management, and cross-system contact matching. Turns a messy CRM into a reliable source of truth.

Stripe + PayPal

Revenue visibility without logging in. Transaction lookups, failed payment alerts, and revenue reports pulled directly into your morning briefing or on demand.

Connect your entire stack in minutes

Each integration connects with a few clicks via OAuth. No developer needed. No API keys.

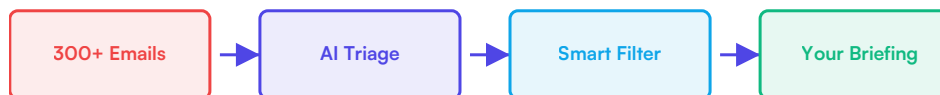
[Get started → ref.viktor.com/simon-hogben](https://ref.viktor.com/simon-hogben)

WORKFLOW 01

The daily morning briefing

Every morning at 7:30am, before you open your laptop, you receive a complete business briefing in Slack. Your AI coworker has already triaged hundreds of emails, flagged what matters, and summarised everything.

How it works



THE BRIEFING PIPELINE RUNS EVERY MORNING ON AUTOPILOT

1. **Scans your entire inbox** — categorises emails by priority and type (client requests, invoices, support tickets, newsletters, system alerts)
2. **Archives the noise** — marketing emails, system notifications, and anything that does not need your attention gets filed automatically
3. **Flags what matters** — security alerts, expiring domains, client questions that need a response
4. **Writes a summary** — sends you a clean, structured briefing with action items highlighted

IN PRACTICE

A typical Monday morning briefing surfaces an unrecognised login attempt on a payment processor, a domain renewal due this week, and two client emails that need a response — all pulled from 300+ emails before you have even opened your laptop.

Time saved

45 min

DAILY INBOX TIME SAVED

300+

EMAILS TRIAGED
AUTOMATICALLY

7:30am

READY BEFORE YOU START

WORKFLOW 02

Client management at scale

Whether you manage ten clients or fifty, across hosting, SEO, ads, and marketing automation — your AI coworker keeps the CRM clean, manages online profiles, and ensures nothing falls through the cracks.

CRM data management

Your AI coworker connects to your CRM (Zoho, HubSpot, Salesforce, Pipedrive, or others) and:

- **Cleans and enriches data** — fills in missing details, standardises formats, merges duplicates, tags contacts by service type
- **Cross-references systems** — matches CRM contacts against billing, project management, and communication channels to spot gaps
- **Generates client overviews** — pulls everything you know about a client from multiple systems into one clean document

IN PRACTICE

Ask your AI coworker to run a CRM health check. Within an hour it will enrich records with missing details, standardise tags and service categories, flag duplicate entries, and give you a clean summary of what it fixed. A full-day data cleanup project, done before lunch.

Online profile management

If you or your clients have online profiles (Google Business Profile, social channels, directory listings), your AI coworker can manage them on a schedule:

- **Scheduled content** — publish to multiple platforms automatically, rotating through different content types and maintaining a consistent brand presence
- **Review and reputation management** — scan for new reviews and draft personalised, on-brand responses
- **Multi-location management** — handle 10, 20, or 50 locations from one place

IN PRACTICE

Every week, your AI coworker scans all client profiles and drafts personalised responses to new reviews — matching each client's brand voice and referencing what the reviewer actually said. Across 10 or 20 locations, that is hours of reputation management handled automatically.

WORKFLOW 03

Reporting and analytics

Your AI coworker connects to Google Analytics, Google Ads, Search Console, and other platforms to pull live data, analyse it, and produce reports — without you touching a spreadsheet.

Google Ads analysis

- Campaign performance reviews with period comparisons
- Search term mining and negative keyword suggestions
- Budget allocation recommendations
- Bidding strategy audits
- Performance Max channel breakdowns

SEO and web analytics

- Cross-reference top GA4 pages with Search Console data
- Identify pages with impressions but low clicks
- Spot ranking opportunities on page 2
- Track keyword position changes
- Content gap analysis

The before and after

TASK	BEFORE AI COWORKER	AFTER AI COWORKER
Weekly ad review	2 hours pulling data, building spreadsheets, writing commentary	Full report with recommendations in 5 minutes
SEO audit	Half a day crawling tools, exporting CSVs, cross-referencing	Connected to GSC and GA4 — produces the audit live
Client reporting	1-2 hours per client, manually formatting numbers	Automated dashboards generated on demand
Search term review	Export, filter in Excel, manually categorise 500+ terms	AI classifies every term, suggests negatives and expansions

WORKFLOW 04

Content creation across platforms

From long-form articles to social captions to press releases, your AI coworker writes content that sounds like you — because it learns your voice and preferences over time.

01 Brief and research

Give it a topic. It researches current rankings, checks what competitors cover, and identifies content gaps your piece should fill.

02 Draft with brand voice

It writes in your brand's voice, not generic AI-speak. Brand guidelines, banned phrases, tone — all loaded and applied automatically.

03 SEO optimisation

Internal linking, keyword placement, meta descriptions, heading structure — handled as part of the writing process, not bolted on after.

04 Review and publish

You review the final draft. It publishes directly to WordPress via REST API, shares as a Google Doc, or posts to social channels — your choice.

KEY POINT

Your AI coworker remembers each client's brand voice across every interaction. It knows which phrases to avoid, which tone to use, and what style each brand prefers. No more re-briefing every time.

Multi-platform content at scale

Set up scheduled content across multiple platforms — social channels, business profiles, websites, newsletters. The AI coworker adapts format and tone per platform, rotates through content types, and publishes on autopilot while maintaining a consistent brand voice. Viktor drafts. You approve. It ships.

WORKFLOW 05

Documents, outreach, and team coordination

Three more workflows that round out the AI coworker's daily role: professional document creation, outbound sales campaigns, and team task management.

Document creation

Written documents

- Google Docs with native headings, tables, formatting
- Client plans and strategy documents
- PDF reports and branded decks
- Excel spreadsheets with formulas

Operational documents

- HR policies and employment contracts
- Client onboarding checklists
- Standard operating procedures
- Meeting notes and action summaries

IN PRACTICE

Need employment contracts or HR policies? Your AI coworker drafts them in native Google Docs format — properly structured with headings, tables, and appropriate legal language. A set of 12 policy documents that would cost hundreds in legal fees, done in an afternoon.

Outbound sales campaigns

- **Sequence writing** — multi-step email sequences with personalisation tokens and A/B test variations
- **Platform setup** — configure sending domains, mailbox warming, and compliance settings
- **Reply classification** — automatically categorise responses and route qualified leads to your calendar

Team management

- **Task lists** — maintain shared task lists with assignees, due dates, and completion tracking. Add tasks by simply messaging the AI.
- **Project coordination** — create project boards with tasks, milestones, and assignments in Asana, Notion, or other tools

- **Status updates** — generate structured daily or weekly updates from across your tools

WORKFLOW 06

Website monitoring and WordPress at scale

If you manage client websites, your AI coworker acts as an intelligent filter between raw server alerts and your attention — and it can take action on WordPress sites directly.

Smart alert monitoring

- **Uptime and alerts** — integrate with monitoring tools and get intelligent, contextualised summaries instead of raw notification spam
- **Security scanning** — flag plugin vulnerabilities, suspicious login attempts, SSL certificate expirations
- **Context-aware escalation** — checks whether the team has already acknowledged an issue before bothering you

IN PRACTICE

Your AI coworker monitors server alerts across all your client sites. When vulnerability alerts fire, it checks context — has someone already acknowledged it? Is it a false positive? — and only escalates genuine issues. Smart filtering instead of notification spam.

WordPress sites via REST API

By connecting each WordPress site via an application password, your AI coworker can operate across your entire portfolio:

- **Publish content directly** — articles, pages, and updates pushed straight to WordPress without logging into each site
- **Bulk image optimisation** — update ALT text across hundreds of images for accessibility and SEO, site by site
- **Plugin and theme management** — check versions, flag outdated plugins, coordinate updates across all sites
- **Site health checks** — pull site status, storage usage, and performance data from every site in your portfolio

HOW IT WORKS

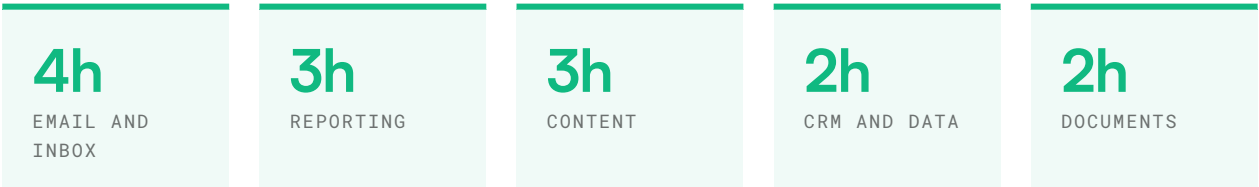
Each WordPress site gets an application password (generated in Users → Application Passwords). Your AI coworker connects securely using the WordPress REST API to read and write data on any connected site. Set up takes two minutes per site — and you never need to share admin logins.

What this costs versus what it replaces

Here is the honest maths. An AI coworker is not free, but the return on investment is hard to argue with.

OPTION	MONTHLY COST	WHAT YOU GET
Part-time VA	\$1,000 — \$2,000	20-30 hours/month, single timezone, needs training, limited to manual tasks
Junior employee	\$2,500 — \$4,000+	Full-time but needs management, onboarding, HR, equipment, benefits
AI coworker	~\$100 — \$300	Always available, 3,200+ integrations, no training, scales instantly

Time reclaimed per week



That is **14 hours per week** — nearly two full working days. For a small business owner, that time goes straight back into revenue-generating work: sales calls, client relationships, strategy, or simply having your evenings back.

THE REAL VALUE

It is not just about saving time. It is about **consistency**. The morning briefing arrives at 7:30am every day. Reviews get replied to every week. Content gets published on schedule. Nothing slips because someone forgot or got busy.

How to talk to it: prompting techniques

You do not need to learn "prompt engineering." But knowing how to communicate clearly makes a huge difference in the quality of work you get back.

The golden rules

Be specific about scope

Instead of "check my ads" say "review the Google Ads performance for Client X this week vs last week and flag anything unusual." The more context you give, the better the output.

Name the client, timeframe, and format

"Write an article about winter photography tips — 1,200 words, include internal links, optimise for their brand voice." Three specifics that transform a vague task into a precise brief.

Tell it your preferences once

Say "I always sign off emails with Regards, [Name]" or "never use the phrase 'I hope this email finds you well'" — and it remembers permanently. You are training a team member, not a chatbot.

Use "do X" not "can you do X?"

"Run a CRM health check and fix any missing tags" gets you further than "could you maybe take a look at the CRM sometime?" Be direct. It is a coworker, not a customer service chat.

Good vs bad prompts

WEAK PROMPT	STRONG PROMPT
"Check my SEO"	"Cross-reference the top 20 GA4 pages with Search Console data for my site. Flag any page with impressions over 500 but CTR below 2%."
"Write something for social media"	"Write 5 LinkedIn posts about AI tools for small business owners. Keep them under 200 words, conversational tone, no hashtag spam."
"Sort out the emails"	"Set up a daily morning briefing at 7:30am. Archive newsletters and marketing. Flag client emails, invoices, and security alerts. Send me the summary in Slack."

THE COMPOUNDING EFFECT

Every preference you share, every correction you make, and every workflow you set up gets saved. After a month, your AI coworker knows your clients, your tone, your tools, and your processes. It is a fundamentally different experience from starting a fresh ChatGPT conversation every time.

DON'T TAKE OUR WORD FOR IT

What real users say

"It's kind of blown my mind seeing what Viktor can actually do. I'm having real conversations with my business partner about investing in an AI tool — something we used to only think about when it came to hiring actual people."

Robert Tyrrell — Owner, TalentBright

"Viktor is our eyes, ears, and hands. It's made us realize that we might really never have to hire someone."

Jordan Dikoum — Co-Founder, UniTru Inc.

"Viktor may feel expensive for a monthly subscription, but is the cheapest employee I've ever hired AND the only one who acts on my midnight instructions."

Jacob Aldridge — Founder, Como Business Coaching

"It's a proactive employee that learns what's important in your company and delivers without hesitation."

Matthias Lis — CEO, CodeYourBrand

TRUSTED & SECURE

SOC 2 compliant. \$100 in free credits to get started. No credit card required. Review-first is non-negotiable — Viktor always asks for your approval before taking action on your live systems.

GETTING STARTED

How to set up your own AI coworker

Getting started is simpler than you might think. Here is the step-by-step process to follow.

01 Sign up and connect your workspace

Create your account at ref.viktor.com/simon-hogben. Connect Viktor to your Slack workspace. This takes about five minutes.

02 Set up your knowledge layer

Connect Notion and Google Drive first. This gives your AI coworker the foundation it needs — your client database, your processes, your document structure.

03 Connect your core integrations

Add email, calendar, and CRM. Each integration connects with a few clicks via OAuth. No developer or API keys needed.

04 Start with one workflow

Pick your biggest time drain. For most people, email triage or client reporting. Set up one scheduled task and let it run for a week.

05 Expand and automate

Add more integrations. Each new connection multiplies what the AI can do because it cross-references data across systems.

Your exclusive offer

New users get **\$50 off their first purchase** plus **\$100 in trial credits** when signing up through the link below. No credit card required. That is enough to set up your first workflows and see real results before committing.

ref.viktor.com/simon-hogben →

The 30-day starter checklist

Week 1 — Foundation

- Sign up and connect Slack
- Connect Notion and Google Drive
- Set up your channel structure
- Set up daily morning briefing

Week 2 — Core workflows

- Connect your CRM
- Request a data health audit
- Connect GA4 and/or Search Console
- Request your first performance report

Week 3 — Expansion

- Connect ad accounts
- Request a campaign performance review
- Connect online profiles and social channels
- Set up scheduled content publishing

Week 4 — Automation

- Connect WordPress sites via REST API
- Set up recurring scheduled tasks
- Start task management via Slack
- Review and refine workflows

Who this works best for

GREAT FIT

- Solo business owners juggling everything
- Small agencies managing multiple clients
- Freelancers wanting to scale without hiring
- Service businesses with repetitive ops

EVEN BETTER FIT

- You already use Google Workspace
- You manage ad campaigns or SEO
- You spend too long on email every day
- You want to look like a bigger operation

Ready to get your own AI coworker?

Every workflow in this playbook is ready to use in your business, from day one. The morning briefing. The client reports. The content. The CRM management. All of it.

If you are running a small business, freelancing, or managing clients solo — this is the closest thing to hiring a team member without actually hiring anyone.

New users get **\$50 off** their first purchase and **\$100 in trial credits** through the link below.

ref.viktor.com/simon-hogben

\$50 OFF + \$100 TRIAL CREDITS · NO CREDIT CARD REQUIRED