

COMPANY OVERVIEW

ClearOak.

We help operators put the latest technology to work, the way their business actually runs.

FOR

Management & key operators

APPROACH

Apprenticeship, hands on

OUTCOME

Adoption. Always adoption.

• WHY WE BUILT CLEAROAK

We built ClearOak because owners shouldn't have to become technologists to put AI to work in their business.

THE PROBLEM WE KEPT SEEING

Generic AI courses teach the tool, not the work.

Teams sit through a course on someone else's data, doing someone else's work. They take notes, they nod, and the next Monday morning they go back to the old way. The information was real. The application never happened. Without application, AI doesn't stick.

Meanwhile, the businesses that are actually using AI are quietly resetting what fast, lean, and accurate look like. The longer that gap stays open, the more it costs in time, margin, and the senior people who carry the work in their heads.

WHY WE BUILT CLEAROAK

We get AI working in your business before training even starts.

We come in, identify the workflow eating your team's Fridays, and build the asset on your real data first. The first time an operator sits down with us, the work they've been doing manually is already running in front of them. The aha lands on day one, on real work, not a demo.

Then we apprentice them through it until they own it. You stay in your lane. They stay in theirs. The business moves forward.

WHAT YOU WALK AWAY WITH

An asset.

Running on your data, used every week.

A method.

To find and automate the next workflow without us.

Speed back.

In the parts of the business that need it most.

We're your tech-enablement partner. Not a vendor. Not a course.

We've operated inside companies like yours. We know how they move, where the friction lives, and what an "aha" moment actually looks like on a Tuesday morning. That's the job. Find the workflow that's costing you the most. Build the fix on your real data. Stay until it sticks.

01

WE TRAIN

Management & key employees.

Not the whole org. Not an IT rollout. The operators who already own outcomes, who can take an asset, make it their own, and pass it to the next person without us in the room.

02

WE BUILD

The asset, on your data, before we walk in.

We identify the workflow costing you the most, then build the asset on your actual data before Session 01 begins. The first time you sit down with us, the work you've been doing manually is running in front of you. The "aha" moment lands on day one, on real work, not a demo.

03

WE APPRENTICE

Until you can build the next one yourself.

We teach you how the asset was built, how to operate it every week, and the methodology underneath. You leave with three things. The asset on your machine. The muscle memory to run it weekly. The framework to find and automate the next workflow on your own.

WHAT IT DOES FOR YOU

Reduce mental load.

Stop carrying it in your head.

Free your time.

For the work only you can do.

Set up for growth.

Autonomous management, leveraged tools.

Three steps. One muscle.

Watch → Build with → Own is how apprentices have learned trades for centuries. It's how we deliver every engagement, in order, on purpose.

STEP 01 · FOUNDATIONS

Watch.

We run the asset end-to-end, narrated step by step, on this week's actual work. The "aha" moment hits here. The job you've been doing manually for years, done, before you've touched a key.

Why first: you can't build muscle memory for a pattern you haven't seen, and you can't trust a tool you haven't watched do your job.

STEP 02 · HANDS ON

Build with.

You drive. We sit next to you. You run it yourself on this week's data, edit the rules when something needs to change, and stay in the seat until it feels like yours.

Why second: mistakes here are the lesson. Doing the work with help is how the muscle forms.

STEP 03 · OWNERSHIP

Own it.

You run the asset solo. Then we hand over the methodology. The same lens we used to find and build this workflow, you can use on any other workflow worth automating.

Why last: autonomy is the whole point. The asset is the win. The methodology is the compounding return.

WHY THIS WORKS

Practice problems don't transfer. Adult-learning research is consistent: skills only encode when the task is real, the stakes are yours, and the context is your own. We start with the problem you already hate, not a sandbox.

Tools change. Models change. These two frameworks don't.

Every engagement leaves your team with two mental models for working with AI on any task, on any tool, for years to come.

FRAMEWORK 01 · THE FOUNDATION

AI predicts. Tools act. You decide.

The three ingredients underneath every workflow we build. Take any one out and the workflow doesn't exist. That's not a limitation. It's the design.

Predicts.

THE MODEL

It reads your instruction and produces the most useful response it can. Fast, fluent, never tired.

Acts.

THE TOOLS

Equipped with a browser, your files, and your business rules, it moves, not just answers. This is what makes background workflows possible.

Decides.

YOU

Your knowledge of the business, the customer, and the standard turns AI output into something worth shipping.

FRAMEWORK 02 · THE 4DS

A timeless way to work with any AI, on any task.

Developed by Profs. Dakan & Feller with Anthropic. Run every AI interaction through them, in order, and the work stays yours.

01

DELEGATION

When to use AI.

Decide what to hand over and what to keep. Not every task belongs to AI.

02

DESCRIPTION

How to ask.

Frame the task with enough context, constraints, and format so the model can answer well.

03

DISCERNMENT

How to evaluate.

Check before you trust. AI is built to sound right, not to be right. Verify against source.

04

DILIGENCE

How to take responsibility.

You sign the work. There is no AI on the signature line. Only you.

If something feels off, the answer is always: which framework did we skip?

You're never operating without a net.

Every training engagement spans five phases. You're never handed something and left to figure it out. Every phase has a back-and-forth built in.

<p>PRE-BUILD</p> <p>01</p> <p>Before Session 01</p> <p>We identify the highest-pain workflow, build it on your historical data, and validate it end-to-end before you ever see a slide.</p> <p><i>Workflow tested and ready</i></p>	<p>SESSION 01</p> <p>02</p> <p>See it work</p> <p>Foundations, the 4Ds, and a narrated demo of the workflow running on your data. You watch. No driving yet.</p> <p><i>You understand the why and the what</i></p>	<p>SESSION 02</p> <p>03</p> <p>Run it yourself</p> <p>You take the keyboard. We coach. You resolve flags, edit rules, and run the workflow yourself with us in the room.</p> <p><i>You can run it alone next Friday</i></p>	<p>SESSION 03</p> <p>04</p> <p>Take it over</p> <p>We polish rough edges live on your files and hand over the framework for finding the next workflow worth automating.</p> <p><i>You own the workflow and the method</i></p>	<p>30-DAY SUPPORT</p> <p>05</p> <p>After the room</p> <p>Available for questions, edits, and additions. A written recommendation for what to take on next, when you're ready.</p> <p><i>The next module scoped and waiting</i></p>
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Every session ends with something to do. Every "between" brings real questions back. That's how it sticks.

● WHAT THIS LOOKS LIKE IN PRACTICE

The investment pays for itself. Then it keeps paying.

A representative sample of recent engagements. Identities have been anonymized; the numbers are real and verified against client operations.

<p>COMMERCIAL PAINTING · FULL ENGAGEMENT</p> <p>One superintendent routing 35 painters by email, whiteboard, and spreadsheet.</p> <p>We moved the routing logic into a centralized system and gave estimators a live dashboard. Critical-person risk gone, estimator follow-ups gone, schedule chaos gone.</p> <hr/> <p>\$96,540 NET ANNUAL GAIN</p> <p>1,296 HOURS RECOVERED</p> <p>643% FIRST-YEAR ROI</p> <p>5 roles TIME SAVED ACROSS</p>	<p>AWNING MANUFACTURER · TARGETED ENGAGEMENT *</p> <p>Sales reps drowning. Older quotes from quieter prospects falling through the cracks.</p> <p>A semi-automated follow-up system that drafts emails directly in each rep's inbox, and gives managers visibility into quote status across the team.</p> <hr/> <p>+3 pts CLOSE RATE LIFT</p> <p>29 ADDITIONAL DEALS / YR</p> <p>\$375K ADDED REVENUE / YR</p> <p>80 quotes/mo VOLUME COVERED</p> <p><small>* Recently launched engagement. Annualized projections based on current trajectory; full results will firm up as the program matures.</small></p>	<p>SIGN & AWNING · TARGETED ENGAGEMENT</p> <p>The GM spending 25 hours a week reviewing every semi-complex estimate. All judgment in his head.</p> <p>An intelligent quoting tool that captures the GM's pricing logic, flags issues, and guides the review. Updated quarterly so it stays current.</p> <hr/> <p>20-25 HRS/WEEK RECOVERED</p> <p>\$78-97K ANNUAL CAPACITY</p> <p>1,000+ HOURS / YEAR</p> <p>GM time FREED FOR STRATEGY</p>
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<p>RECENTLY COMPLETED ENGAGEMENT</p> <p>13-week cashflow, end-to-end by hand. Every week. By the controller.</p> <hr/> <p>-\$8,125 annual labor recovered</p> <p>AT \$125/HR ALL-IN RATE</p>	<p>BEFORE</p> <p>1h 45m/wk</p> <p>≈ \$11,375 / year</p> <p>Pulling the data, reconciling gaps, and producing the weekly analysis. All by hand, every week.</p>	<p>AFTER</p> <p>30 min/wk</p> <p>≈ \$3,250 / year</p> <p>Same end-to-end cycle, pull through analysis. AI handles the assembly; she reviews and ships.</p>
<p>65 hrs redirected to higher-value work < 12 mo engagement payback</p>		

THE MATH BEHIND THE YES

You don't leave with information. You leave with a working asset, already running on your business.

A training engagement that ends with a binder is a cost. One that ends with an asset already running on your data is an investment. Our smallest engagements pay for themselves within the first year on labor savings alone. After that, every hour the asset saves is pure return.

All figures from actual ClearOak engagements. Client identities anonymized. References available on request.

• WHAT MAKES US DIFFERENT

Three things separate us from every other AI training engagement you've considered.

01

We build before we walk in.

Most engagements start with discovery and end six months later still in discovery. We arrive with a working version of your hardest workflow already running on your data. The first session is a demo, not a kickoff.

02

We train operators, not the org.

Not an IT rollout. Not a town hall. A small group of management and key operators who already own outcomes, who can take the tool, make it theirs, and teach the next person without us in the room.

03

Adoption is the only outcome that matters.

We don't measure success by hours delivered or slides shown. We measure it by whether the workflow is still running, by your team, the week after we leave. Everything we do is built around that one number.

Three ways in. We'll help you pick the right one.

Every engagement starts with a discovery call. We listen, identify candidate workflows, and only recommend a track that we're confident will pay for itself.

TRACK 01 · ONE OPERATOR

The Apprenticeship

One manager. One workflow. Three sessions. We find the job eating their week, build the asset on their real data, and apprentice them through Watch, Build-with, Own. They leave running it solo every Friday.

Best when: a single key operator owns a critical workflow that's becoming a bottleneck, or one you want unstuck before it costs you a hire.

TRACK 02 · MOST COMMON

The Workshop

Up to three operators doing the same work three different ways. We build one shared asset and apprentice all three through it together. One source of truth, three trained owners, consistent output across the team.

Best when: you have a team doing the same task differently and you want consistency, speed, and one place where the business rules actually live.

TRACK 03 · EMBEDDED

The Tech Enablement Partnership

We come on board as your tech enablement partner. Full audit of how your operation actually runs, a prioritized roadmap of every workflow worth automating, multiple builds delivered in sequence, and an ongoing seat at the table as new opportunities surface.

Best when: you sense AI should be changing how you operate at every level, and you want a long-term partner finding and building, not a one-and-done.

Let's just have a conversation.

Thirty minutes on a video call. No deck. No pitch. Tell us what's broken. We'll tell you whether we can help and which track fits. Usually before the call ends.

[Book a 30-minute discovery call →](#)

OR REACH OUT DIRECT

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