

AI Training for Your Members

A real automation, built from your members' own answers, demonstrated live at your event.

A workflow automation program for trade associations · clearoakandco.com

ABOUT CLEAROAK

We build automations, then teach the people who own them

ClearOak & Co. is an AI training and implementation firm for commercial contractors, run by operators and entrepreneurs, not career technologists. We do not give AI keynotes. We build working automations inside real contracting businesses, on their data and their tools, then train the people who own the workflow to run and extend them. Every engagement is delivered by the trainer and technologist best matched to the trade and the workflow at hand.

Learn more at clearoakandco.com.

THE PROOF

Documented results from member-sized companies

PAINTING · SCHEDULING

\$96,540

net annual gain, with 1,296 hours per year recovered

AWNING · QUOTE FOLLOW-UP

~\$375K

added annually, close rate lifted from 30% to 33%

SIGN & AWNING · QUOTING

1,000+ hrs

recovered per year with an AI-assisted quoting tool

"We are already seeing the \$ benefit from what you've done."

CLEAROAK CLIENT

OUR APPROACH

Start with a real problem

We believe the best way to learn AI is not theory first. It is a real problem first. People learn fastest when they see feasible results on their own problem, and we have learned that over time inside real companies. It is why our approach looks the way it does: they see it work, they build with it, they run it with us beside them, and then they run it without us. That arc is deliberate, and it is the strategic backbone of everything we deliver.

AI is nuanced, and so is every company. The tool that transforms one shop's quoting process can be useless for the shop next door. So we never teach one-tool-fits-all. We teach the fundamentals of automating and operating more efficiently: how to spot the workflow worth automating, how to direct AI with a company's real context, how to judge output quality, and how to build the ecosystem around an automation so it keeps running. Your members leave with tools they can use immediately and principles that hold for any AI, no matter how the technology changes.

THE PROGRAM

From member survey to live demo at your event

STEP 1 Survey: find the pain	A short, high-level survey asks which departments and areas members are struggling in most. You distribute it through your channels.
STEP 2 Survey: get the detail	We take the most common department and gather detail on the workflow itself and the tools members are using day to day.
STEP 3 We build the automation	We assign the trainer and technologist best matched to that department and workflow, then build a working automation modeled on how your members actually run it. It shows exactly what we can do and how we do it.
STEP 4 The session at your event	90 to 120 minutes, fully interactive. A general overview of how effective automations get made, the live demonstration of the build, and the fundamentals taught off that workflow. The focus is getting members automated, not the technical internals of AI; a first-level AI foundations block can be folded in if your members want it. A pre-session checklist tells everyone what to download beforehand, so the session is about learning, not setup.

THE PARTNERSHIP

What each side brings

For the association, this is programming members remember and talk about: education anchored in your members' own survey answers, not a vendor pitch, in a format you can run again at future events.

WHAT MEMBERS WALK AWAY WITH

- ✓ Frameworks they can use moving forward, built off the workflow taught in the session.
- ✓ The full recording of everything covered.
- ✓ Access to us for questions after the event.
- ✓ A discounted go-forward path to custom workflows built for their own businesses.

WHAT WE NEED FROM YOU

- ✓ Two short survey rounds distributed to members through your existing channels.
- ✓ A 90 to 120 minute interactive session slot with a screen and screen share.
- ✓ One point of contact for coordination.

Next step: a 30-minute call

We will walk through our past builds so you can see exactly what your members would get, talk through which trainer and technologist we would assign to your trades, and discuss pricing based on the program you are looking for.

Book a call

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Results shown are from documented ClearOak client engagements. Value estimates for member builds are preliminary and based on discovery data, not guarantees.