

The ClearOak Training Engagement

It starts with your problem. It ends with you owning the solution.

An overview for owners and operators · clearoakandco.com

WHERE WE START

We start with the problem

Every ClearOak engagement starts in the same place: not an AI overview, not a software pitch, but the problem itself. In discovery, we map where time is actually leaking out of your operation, and we clarify together which problem makes the most sense to solve first. That is always the one costing the most time, and ultimately the most revenue and profitability.

The drag is bigger than most owners realize. Research shows **only about 30% of a sales rep's time is spent actually selling**; the rest is administrative work (Salesforce, State of Sales). The same pattern holds for your controller, your estimator, and your operations manager. That is the problem we go after first.

THE DIFFERENCE

Why this training is like no other

◆ Your problem is solved before training begins

Most training starts with theory and hopes you find an application. We invert it. Before Session 1, we build a working automation around the problem we selected together, using your real data and your real tools. Day one, you watch it run.

◆ Timeless principles, not tool trivia

You need durable principles for working with any AI: how to give it context, how to direct it, how to judge its output, and how to stay responsible for the result. We teach primarily in the Anthropic ecosystem (Claude, Claude Projects, Claude Cowork), the most well-structured for business. Tools will change. These skills will not.

◆ Built on your workflow, not a demo dataset

Every session, every exercise, every question happens inside the process your team runs every week. Nothing you learn needs translating before it becomes useful.

◆ It ends with ownership

The goal is not dependence on ClearOak. By the final session, you run the workflow, you can explain how it works, and you can extend it yourself.

THE CURRICULUM

What you will learn

- ✓ AI foundations: what the AI is actually doing in your workflow, in plain language
- ✓ How to write effective prompts: context, examples, and output constraints
- ✓ How to evaluate AI output: is this right, and how do I know?
- ✓ The Anthropic ecosystem: Claude, Claude Projects, and Claude Cowork
- ✓ Techniques for context and memory, so the AI knows your business without re-explaining it every time
- ✓ How to update and extend the workflow yourself when your business changes

THE PROCESS

Four to six weeks, three sessions, one owned workflow

The spacing between sessions is deliberate. The in-between weeks are where you see the workflow in your real day-to-day, and where the adjustments and aha moments happen.

WEEK 0 Before we start	Discovery call. We map the problems, clarify which one to solve first, then build and test the automation against your real data.
SESSION 1 See it work	AI foundations, then a live demo of your problem being solved end to end. We walk through the methodology behind the automation.
IN BETWEEN Iteration week	You watch the workflow in your day-to-day and note what is missing or worth adding. We make the adjustments.
SESSION 2 Run it with us	You take the keyboard and run the workflow yourself, with us right next to you. The natural questions from real daily work get answered live.
IN BETWEEN Iteration week	You run it independently. Real snags surface and we fix them together.
SESSION 3 Own it	You take the workflow over entirely and teach it back to us. We reintroduce the methodology so you understand what is under the hood, and we surface the next best workflow candidate together.
WITHIN 5 DAYS Asset delivery	The complete package below lands in your hands, with a written summary of what to do first.
DAYS 1 TO 30 On call	We stay available for questions and the aha moments that come with daily use, plus a scheduled check-in call to keep the workflow on track.

THE DELIVERABLES

What you walk away with

Most training ends with a certificate. This one ends with a working asset and the skills to extend it. At the close of the engagement, you receive:

THE CENTERPIECE

The workflow asset itself

The working automation, built on your data and tested in your business, transferred to you entirely. You own it, you run it, you extend it.

✓ **The foundational skillset**

Everything we covered and spoke through across the sessions, yours to apply to any future workflow.

✓ **The complete reference package**

The full slide deck plus a step-by-step guide with your exact run steps and troubleshooting scenarios.

✓ **30 days of on-call support**

Questions answered as they come up in daily use, plus a scheduled check-in call.

✓ **Every session recording**

Labeled and organized by session, so you and your team can revisit any moment of the training.

✓ **A written next-workflow recommendation**

The next highest-value problem to solve, so the momentum does not stop at one workflow.

THE PROOF

Real results from real contractors

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

THE DECISION

What you are saying yes to

This engagement is bought by an owner or manager and delivered to the person who owns the workflow. Sometimes that is the same person; often it is not. It works one-to-one, and it works for a team that runs a workflow together. Either way, the commitment is clear on both sides.

YOUR COMMITMENT

- ✓ **The investment:** starting at \$3,000, priced to the value of the workflow being recovered. 50% at signing, 50% at completion. Payback on most workflows inside 12 months.
- ✓ **One participant:** the person who actually runs this workflow every week.
- ✓ **Their time:** three working sessions of 60 to 90 minutes across the four to six weeks, plus running the workflow as part of their normal work between sessions.
- ✓ **Access:** the relevant data and systems, and a Claude Pro account (about \$20 per month).

WHAT CLEAROAK CARRIES

- ✓ **The right expert:** the trainer and technologist best matched to your trade and your workflow, equipped with current, field-specific knowledge.
- ✓ Discovery, scoping, and the preliminary ROI math before you spend a dollar.
- ✓ The complete build and testing before Session 1.
- ✓ Session prep, agendas, and every between-session adjustment.
- ✓ The full asset package within 5 business days of the final session.
- ✓ 30 days of on-call support plus a scheduled check-in call.

How you will know it worked: the workflow runs without us, the time recovered is measurable against the estimate from discovery, and your participant can teach it to someone else on your team.

Next step: a 30-minute discovery call

We will map where time is leaking, clarify which problem is worth solving first, put a preliminary number on what it is costing you annually, and tell you honestly whether it is a fit.

[Book your discovery call](#)

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