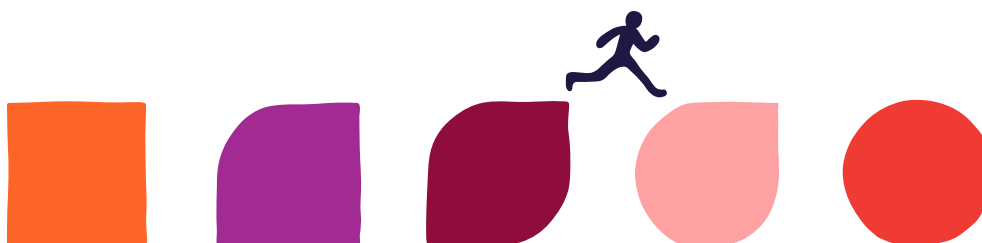


“I’d snap Sarra up while you still can”

How an expert sales consultant turned five years of hard-won tools into three client-ready assets, in a single morning



Client	Sarah Cooper ('Scoop'), Pitchycoo Park — sales and business development consultancy
Engagement	Half-day working session (side-by-side, in person)
Tools	A Claude (Anthropic) 'Project' set up around her brand and voice
Outcome	Three client-ready tools, refined and made consistent in about three hours of working time — work that would traditionally have taken weeks with a designer and developer

June 2026

The headlines say AI’s productivity payoff has been a let-down so far. I spent twenty years delivering change in financial services, so I understand where that comes from; getting a real return out of a change programme is really hard. But most of those studies look at huge organisations and measure a narrow bottom line: the time, and therefore the money, that got saved. We can all guess what happens to time savings in a big company – they are absorbed by other work, usually more meetings, and the financial benefit only shows up when the business eventually holds headcount flat and asks fewer people to do more.

What those studies miss is that for a solopreneur or a small business, with the genAI tools now available at a relatively low price, the payback can be quite remarkable. I had a session with a client recently that brought that home. At one point we were both giggling at how much we’d got done, and the quality of what came out.

The client

Scoop is a superb sales and business development consultant. Her whole job is making sales, and sales data, usable for people who would rather avoid it. She makes it so approachable that she's never short of clients — over five years she's advised or mentored more than fifty of them. Along the way she built a set of tools she uses in her work: tried, tested, and drawn from her own experience.

The catch was that all that value was locked inside plain spreadsheets that carried Scoop's brain. That made them hard to just hand over; a client really needed her in the room to make full sense of them. She had a list of improvements she'd wanted to make for ages, including a simple 'how to use' section so she wasn't explaining the same thing to every client. But that work kept being deprioritised against her client delivery work.

"Sarra has an incredible ability to hold lots of ideas at once, ask the right questions, and distil years of knowledge into something clear, practical and usable. She brings the perfect balance of creative and critical thinking, knowing when to explore and when to gently bring things to completion."

Sarah Cooper, Pitchycoo Park · pitchycoopark.co.uk

The set-up

We blocked out a half day to do it together. I'd done about an hour of prep first. I set up a bespoke Claude project for Scoop with a few context files I'd built for her: one on her business, drawn from her website, and one on her background, drawn from her LinkedIn. I added a tone-of-voice guide derived from her own website copy, and a brand file using her existing colours and fonts, so anything we made would come out aligned to her brand from the start. I'd also had a first go at one of her tools — partly to check the project was set up properly, and partly so she'd see real output the moment she sat down.

The session

We had roughly three hours of proper working time. I drove the AI and shared my screen and Scoop reviewed and steered. Sometimes I typed her feedback, sometimes she recorded a voice note and we dropped it in, sometimes she emailed me the exact wording she wanted.

The technical side was only half of it. I was also bringing decades of experience facilitating and delivering change, which is what kept us moving and stopped us over-perfecting. We could have piled more bells and whistles into each tool, but that would have made them more complicated for her clients, not better. So, I kept steering us back to simple and good enough.

From weeks to ~3 hours

In around 3 hours of time together we produced three client-ready tools — work that would traditionally have taken weeks with a designer and a developer.

What Scoop walked out with

Three client-ready tools she could share straight away:

- **A Sales DNA assessment** that gives a client a baseline on how they sell, and how comfortable they feel doing it.
- **A sales forecast** where you log what you expect to come in against your targets and can see a gap forming months before it lands.
- **A sales pipeline** for tracking every conversation, so leads don't quietly slip away.

All three already worked because Scoop had been using these tools with clients for years. What changed was that we refined and elevated each one: tightening the language, sense-checking the client experience, and creating consistency and cohesion across the whole suite so it read as one set rather than three separate things. Each now opens with a 'start here' page, so a client can pick it up and use it confidently without Scoop talking them through it, and we added copyright marks and 'for your use only' wording, ready for client delivery.

The immediate benefit

Scoop now has three assets she can put straight onto her website and share with a link, instead of a spreadsheet with a covering note explaining what to do. She can use them as lead magnets, or as the seed collateral for the small group coaching she's been wanting to start.

The traditional route would have been weeks of back-and-forth with a designer and a developer — probably two different people, possibly in another time zone — and all of that after a discovery call where she'd have had to picture the finished thing before seeing it. We did it on a sofa in a morning.

"What I valued most is that she didn't stop there. Sarra created the prompts and tools that let me keep building this work myself, alongside the gentle nudges and accountability to keep things on track."

Sarah Cooper, Pitchycoo Park • pitchycoopark.co.uk

The long-term benefit

As we worked, I kept improving the Claude project's instructions, so anything Scoop builds next inherits the same look and feel and matches her style before she has to ask. By the end, the project had become a useful tool in its own right. I've handed the whole thing over to her — context files and instructions included — so she can make the next tools herself in her own Claude account or come back and do them with me. She has plenty more ideas waiting in the same state. Handing a client the means to carry on without me is the real long-term value, and the part that justifies the cost of the workshop.

The upshot

So, when I read that AI doesn't deliver a productivity benefit, I wonder how it's being measured. For an individual or a small business, the benefit is real and immediate. The hard part is finding the time to set the tools up properly and do the work. That's the part I help with. I sit alongside you, in person or online, tune the tools to your situation, and keep us focused on the handful of things that will move your business forward. You come away with the work done, and a way of working you can repeat, without having had to turn yourself into an AI expert.

I'm now taking bookings for Q4 2026. If this is something you'd like to consider for your business, drop me an email: sarra@change-innovation.business

Not quite ready for that?

I've put together a free speedy audit that helps you find the tasks that are consuming your week, and work out which ones are worth fixing first, with AI or otherwise.

Download [Stop Guessing Where AI Fits](#)

About Change Innovation

Change Innovation is a Brighton-based Change & AI adoption consultancy founded by Sarra Lee.

Change Innovation helps firms work out where AI fits and how to adopt it in a way that sticks, in Sussex, London and online.

For solopreneurs and micro businesses: personal 1:1 and small group support, from a discovery call and bespoke AI implementation report to tailored side-by-side working sessions like the one in this case study.

For SMEs and corporates: change expertise and AI adoption support, from 1:1 coaching for leadership teams and AI champions to tailored bootcamps, whole-firm bespoke AI training and hands-on workshops.

Sarra spent twenty years delivering change in financial services, and her MSc research examined how small professional service firms are approaching AI adoption. The advice is grounded in evidence, not enthusiasm.

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