CASE STUDY · HERON FINANCE

we are zenith

From AI curiosity to *real results*

How Heron Finance put 11 team members, from case admin to the board, through our hands-on AI training programme.
Practical, safe AI skills that save real time, every week.

11
team members trained, case admin to board

1 day
up to a full working day saved per person, per week

£0
training cost, funded through a levy transfer

11 of 11
learners interviewed would recommend it

The Starting Point

Heron Finance has worked with We Are Zenith for several years. Nobody in their cohort came in as an expert. Plenty had dabbled with AI, mostly as a search engine; far fewer knew how to use it well, safely, and in a way that changes their working week.

"Used ChatGPT for small bits but nothing out of the very minimal use."

Mortgage Operations Manager

"Using AI sparsely but didn't have a great understanding of it."

Internal Operations Co-ordinator

The Results *At Glance*

- Up to a full working day saved per person, per week
- Manual admin replaced with automations
- CRM and case data analysed in minutes, not hours
- Better-prepared client meetings
- Team decisions driven by AI generated task overviews
- Learners building their own apps and tools

I have found the [training] extremely useful, and it has transformed the way I think about tasks, and how they are carried out, making me more efficient and able to focus on higher value work.

Internal Operations Co-ordinator, Heron Finance

What Changed?

AUTOMATED ADMIN
Recurring emails and manual processes reduced.

FASTER DATA ANALYSIS
CRM and case data analysed in minutes rather than hours.

BETTER PREPARATION
AI used to prepare for client meetings and review information.

NEW WAYS OF WORKING
Learners built their own tools and apps.

WHAT CHANGED

Role by role, in their own words

Different roles. Different challenges. The same outcome – practical AI skills that made a real difference.

Mortgage Operations Manager

3–4 hours saved a week

ChatGPT used to be his only tool. Now he picks the right AI for each job and uses AI linked to the CRM to find and calculate data, every day.

"I use it to pull data, analyse it and then review the data after me, to review my opinions on it and give a varying view."

Internal Operations Co-ordinator

Around a full day saved a week

Recurring admin like update emails is now largely automated, something she couldn't build before. AI is now a core part of her role.

"It has transformed the way I think about tasks… making me more efficient and able to focus on higher value work."

Case Progression

5–10 mins saved per email chain

AI summarises long email chains, and each morning builds a task and case-tracking overview the team uses to allocate work.

"I've felt it's made me better at my job in some ways. Parts of my role are more efficient.

Protection Adviser

Around an hour saved

Preps client meetings with Copilot's Cowork feature, and has gone further than anyone expected, building his own apps with ChatGPT and Claude Code.

"I would recommend it, to future-proof their career as much as possible in an uncertain future."

Fitting it around the day job

Balancing coursework with busy roles was the biggest challenge. The programme adapted: workbooks were simplified after feedback, and learners got early support.

Would they recommend it?

All 11 said yes.

"People can learn to use AI themselves, but they need to be taught how to use it safely, especially in a workplace environment."

Could your team do the same?

Heron funded their cohort through a levy transfer, so the training cost them nothing. Let's explore AI training for your team.

HERON