

You are not selling training. You are selling *a defensible position*.

How to take the Article 4 instrument to market: what to charge, who to call, what to say on the phone, how to deliver without losing a weekend, and how to turn one INSET day into a recurring relationship.

PART 1 / 13

What you are actually selling

Get this wrong and every conversation is a struggle. Schools do not buy AI training — they have been offered plenty of it and mostly declined. They buy the removal of a specific, dated, named risk that currently sits with one person's job title.

WHAT THEY WILL NOT BUY

"AI training for your staff"

Generic, undated, no consequence for skipping it, competes with forty other CPD offers. Sits in the "nice when we have budget" pile forever.

WHAT THEY WILL BUY

"Evidence you met a legal duty that is now being enforced"

Specific, dated, owned by a named person, and the deliverable is a printed file they can hand to an inspector or a board. Moves from CPD budget to compliance budget, which is a different queue.

The one-sentence pitch

SAY THIS, IN THIS ORDER

"The AI literacy duty in Article 4 of the EU AI Act has applied since February 2025, and national market surveillance authorities started enforcing it in August 2026. I run a one-day programme that gets an international school from nothing to a dated, evidenced position — a system register, a staff training record, a policy set and a board paper. I'm a Digital Technology teacher at an international school in the EU, so it is built for how schools actually run rather than adapted from corporate compliance."

Three moves in that paragraph: **the duty exists and is enforced, the output is a file not a feeling, I am one of you**. Never drop the third — it is the entire reason you beat the consultancies.

Who signs, who champions, who blocks

ROLE	FUNCTION	WHAT MOVES THEM
Head of School / Principal	SIGNS	Institutional risk and reputation. Wants to be able to answer a governor asking "are we covered?" without hedging. Rarely wants detail.
Head of Digital Learning	CHAMPIONS	Usually already knows this is a gap and has been unable to get it prioritised. Your best ally and your best first email. Give them ammunition, not a sales pitch.
Business Manager / Bursar	GATES	Budget line and procurement. Cares that the price is fixed, the scope is bounded, and there is an invoice they can code. Never quote a range.
DP Coordinator / Head of Secondary	CHAMPIONS	Assessment integrity is already eating their term. The permitted-use framework is what they want; the compliance is a bonus.
DPO (often external)	BLOCKS	May claim this is already covered under GDPR work. It is not — different regulation, different duty. Brief them early and make them a collaborator, or they will kill it late.
Board / Governors	RATIFIES	Want the minute. Template T5 in the instrument exists so the Head can put this in front of them in ten minutes.

THE SHORTEST PATH IN A SCHOOL

Head of Digital Learning champions it → Head of School signs it → Business Manager processes it → Board minutes it. Email the champion, not the signer. The champion will walk it up for you, and they will do it better than you can because they know the internal politics.

PART 2 / 13

The offer ladder and what to charge

Four rungs plus a retainer. Fixed prices, published or quoted without hesitation. The moment you say "it depends on scope" you become a consultancy, and a consultancy is what they are trying to avoid.

TIER	OFFER	WHAT THEY GET	PRICE	YOUR TIME
0	Readiness call Lead generation	Twenty minutes, no slides. You walk them through the four questions in Part 6 and tell them honestly where they sit. They leave with a one-paragraph summary by email.	Free	30 min
1	Readiness audit Entry, remote	Completed 24-point instrument, AI system register built with them, Article 5 screening, a written readiness position and a board paper drafted from template T5.	€950	1 day
2	Audit + INSET day The core offer	Tier 1, plus the full six-module staff day delivered on site, all evidence artefacts collected and filed, and the policy set T1–T4 adapted to their context.	€2,400	3 days
3	Full-term programme Highest value	Tier 2, plus the student programme mapped to AILit across year groups, three classroom activities piloted with named teachers, twelve-week check-ins, and the final re-audit printed.	€4,800	7 days

TIER	OFFER	WHAT THEY GET	PRICE	YOUR TIME
R	Annual review retainer Recurring	Yearly re-audit, regulatory update briefing, refreshed policy dates, and new-starter induction materials kept current. Renews automatically.	€1,200/yr	1 day/yr

ADD-ONS, PRICED SO THEY ARE EASY TO SAY YES TO

+ €450 Extra twilight A single module re-run for staff who missed the day, or a department deep-dive.	+ €400 Board presentation You present the readiness position to governors yourself. Heads love not having to.	+ €600 Policy drafting You write T1–T3 fully bespoke rather than adapting templates. Popular with schools that have no capacity.
+ €350 Parent evening Forty-five minutes to parents on how the school approaches AI. Reputational gold for the Head.	+ €900 Second campus Same group, second site. Materials are done; only delivery repeats.	FREE Referral thank-you An extra twilight, given to any school that introduces you to another that books.

PRICING LOGIC, SO YOU CAN DEFEND IT WITHOUT FLINCHING

Tier 2 at €2,400 is roughly what a school pays for one external INSET speaker for a day — except they also get a compliance file. Against a corporate consultancy quoting five figures for AI governance, you are an obvious yes. Against doing nothing, you are the price of removing a named risk from the Head's desk.

Do not discount. If a school genuinely cannot afford Tier 2, sell them Tier 1 and let the audit result make the case for the day. That converts better than a discount anyway, because the gap is now documented in their own file.

GROUP AND NETWORK PRICING

Where the real money is

International school groups run five to forty campuses. Sell the group, not the school. Price at Tier 3 for the first campus and €1,800 per additional campus. One relationship, one invoice, one set of materials, and a case study that unlocks the rest of the sector.

ASSOCIATION ROUTE

Speak once, sell many

School associations and regional heads' networks run termly meetings and are permanently short of relevant speakers. Offer a free 45-minute session. You are not selling from the stage — you are being seen by thirty Heads at once as the person who knows this.

PART 3 / 13

Phase one — build the proof

You cannot sell this cold with no delivery behind you, and you do not need to. Run it once at your own school. Two weeks of work buys you the only asset that matters.

1.1 Pitch it internally as an offer, not a favour

Go to your Head with the instrument printed. Say: the duty is being enforced, we have a gap, I have built the whole thing, and I would like to run it here first. Ask for the INSET slot and permission to use the outcome as a case study, anonymised or named as they prefer.

Most Heads say yes immediately, because you have just removed a problem they knew about and had no plan for.

OUTPUT • AN INSET DATE IN THE CALENDAR

1.2 Run the audit before the day and record the number

Complete the 24-point instrument honestly. Whatever the score is, write it down with the date. This is the "before" half of your case study and it is worth more if it is low.

OUTPUT • A DATED BASELINE SCORE

1.3 Deliver the day exactly as written

Do not improvise the first run. Use the run sheet, use the cards, collect every commitment card at the door. You are testing the product and you need to know which parts drag.

- Time every module against the run sheet and note the drift
- Write down every question you could not answer — these become your FAQ and your Vol. 02 content plan
- Note which of the three contested cards split the room hardest

OUTPUT · A TESTED DELIVERY AND A LIST OF REAL QUESTIONS

1.4 Re-audit and capture the delta

Run the instrument again after the day. The jump from baseline to post-delivery is your headline number. "From 14/48 to 39/48 in one term" is the sentence that sells the next four schools.

OUTPUT · THE NUMBER YOU WILL USE IN EVERY EMAIL

1.5 Get three sentences in writing from someone senior

Ask your Head or Deputy for a short quote while the day is still fresh. Give them a draft to edit — nobody writes a testimonial from scratch. Ask specifically for something that names the outcome, not your personality.

Good: "We went from having nothing documented to a complete evidence file in one term, and the staff engagement was the highest I've seen for a compliance topic." Weak: "Jelena was excellent."

OUTPUT · AN ATTRIBUTABLE QUOTE WITH A JOB TITLE

THE ONE-PAGE CASE STUDY

Before, after, quote, and what was delivered. One side of A4, exported as a PDF and also published as a web page — the web version matters for Vol. 02, because answer engines cannot cite a PDF attachment sitting in your outbox. Anonymise the school name if you must ("a 900-pupil international school in Lisbon") but never anonymise the numbers.

Phase two — build the list

Sixty schools is enough. This is a small, knowable market where personal relevance beats volume, and a list of sixty researched schools will outperform two thousand scraped addresses by a distance.

WHERE THE SCHOOLS ARE

TIER A · START HERE

International schools in Portugal

Roughly forty to sixty, concentrated in Lisbon, Cascais, Porto and the Algarve. Same jurisdiction, same regulator, and you can drive there. Your own network already overlaps with several of them.

TIER B · MONTH TWO

International schools in Spain and Italy

Large markets, same EU duty, English-language leadership. Remote Tier 1 audits travel perfectly; only Tier 2 needs a flight, which you price in.

TIER C · THE MULTIPLIER

School groups and associations

Groups operating multiple EU campuses, plus regional and national associations of international schools. One conversation reaches many.

TIER D · ADJACENT

Bilingual and private national schools

Same duty, less English-language competition for the work, often less served. Slower sales cycle, lower price tolerance. Come back to these once Tiers A–C are working.

WHAT GOES IN THE ROW

FIELD	WHY IT IS THERE
School, city, country	Jurisdiction drives which ePrivacy rules apply to your outreach. See Vol. 03.
Approximate roll and staff count	Sizes the INSET and tells you which tier to lead with.
Curriculum	IB, IGCSE, national. Changes which assessment-integrity examples you use.
Head of Digital Learning — name and role title	Your champion. Named person, not info@.
Head of School — name	Your signer, for the escalation touch.
Public AI signal	Do they have an AI policy page, a blog post, a job ad mentioning AI? This is your opening line and it changes the email from cold to observed.
Source and date	Where you found the contact and when. Vol. 03 explains why this column is not optional.

FIELD	WHY IT IS THERE
Status and next action date	Anything without a next action date is not a lead, it is a bookmark.

DO NOT BUY A LIST

Beyond the compliance exposure covered in Vol. 03, bought lists destroy the thing that makes your outreach work. Your emails land because they demonstrably reference that specific school. Sixty rows you researched yourself, at about four minutes each, is four hours of work and it is the highest-return four hours in this entire playbook.

PART 5 / 13

Phase three — first contact

Full templates and the legal position are in Vol. 03. What matters here is the sequencing decision: which door you knock on, in what order, and what you are asking for.

3.1 Warm before cold, always

Before you send a single cold email, list everyone you already know across these schools — former colleagues, conference contacts, parents at your own school, people from your teaching networks. Ask each for one introduction. A warm introduction converts at several times the rate of the best cold email you will ever write.

OUTPUT • FIVE TO TEN WARM INTRODUCTIONS REQUESTED

3.2 Publish before you pitch

Get the pillar page and two or three posts live first (Vol. 02). When a Head searches your name after your email lands — and they will — there should be something there that demonstrates competence. An empty search result is a silent no.

OUTPUT • A FINDABLE BODY OF WORK, HOWEVER SMALL

3.3 Ask for the readiness call, not the sale

The first email asks for twenty minutes, free, no slides. That is a small ask with an obvious benefit and no procurement implication, so it can be granted by one person without consulting anyone. Asking for a meeting about a €2,400 purchase cannot.

OUTPUT • CALLS IN THE DIARY

3.4 **Work in batches of fifteen**

Fifteen schools per week, four-touch sequence, tracked. Batching lets you see which opening line works before you have burned the whole list, and keeps the follow-up volume inside what one person can actually sustain alongside a job.

OUTPUT • A RHYTHM YOU CAN KEEP FOR A TERM

PART 6 / 13

The discovery call

Twenty minutes. You are not presenting. You are asking four questions that let the school discover its own gap out loud, which is the only kind of discovery anyone ever acts on.

Call structure — twenty minutes

MINUTE 0–2 – FRAME

"Thanks for the time. I'll keep this to twenty minutes. I'm not going to present anything – I want to ask you four questions, and at the end I'll tell you honestly where I think you sit. If that's useful we can talk about what comes next, and if it isn't, you've lost twenty minutes and gained a summary you can use anyway."

MINUTE 2–14 – THE FOUR QUESTIONS

Ask. Then stop talking. The silence is doing the work.

- Q1 "Can you tell me, roughly, every AI system in use across the school right now – including anything staff use that wasn't formally approved?"
→ Almost nobody can. This establishes the gap without you asserting anything.
- Q2 "Who is the named person accountable for AI at the school? Not a committee – whose job description says it?"
→ Usually nobody, or a vague gesture at the DPO. Note the name if there is one; they must be on the proposal.
- Q3 "If a market surveillance authority asked for evidence that your staff have had AI literacy training proportionate to their roles, what could you hand them today?"
→ This is the question that lands. Let it sit.
- Q4 "Do you use anything that infers student attention, engagement, or mood – engagement analytics, proctoring, wellbeing dashboards?"
→ If yes, you have just found a possible prohibited practice and the conversation changes entirely. Do not oversell it. Say you'd want to check the vendor documentation before concluding anything.

MINUTE 14–18 – REFLECT BACK

"Here's what I heard." Summarise their own answers. Name the two or three gaps in their words, not yours. Then:

"For what it's worth, that's completely normal – most schools I speak to are in the same position, because the headline in 2026 said the rules were delayed and the part that applies to you wasn't."

MINUTE 18–20 – ONE CLEAR NEXT STEP

Offer exactly one thing. Never two.

Gap is large + they seem ready → "I'd suggest the audit and the

	staff day. I'll send a one-page proposal today, €2,400 fixed."
Gap is large + no budget signal	→ "Start with the audit at €950. It'll tell you whether you need the day, in writing."
Possible prohibited practice	→ "Before anything else, let's get that vendor answer. I'll send you the exact wording to use today."
Not ready	→ "Sounds like you're covered for now. Can I send you the readiness instrument so you have it?" → they use it, they score low, they come back.

ALWAYS: send the promised thing within four hours, while the call is warm.

DO

Be honest when they are fine

If a school is genuinely in good shape, tell them so and end the call early. You will get the referral, and word travels fast in a small sector. The reputation you want is "she told us we didn't need it".

DO NOT

Perform urgency you do not feel

The deadline is real, which means you never have to inflate it. Educators detect manufactured pressure instantly and it costs you the sector, not just the sale.

The proposal

One page. Sent within four hours of the call. A long proposal signals that the scope is unclear, and unclear scope is exactly what a Business Manager refuses.

One-page proposal skeleton

AI ACT ARTICLE 4 READINESS – [SCHOOL NAME]

Prepared for [NAME, ROLE] · [DATE] · Valid 30 days

WHERE YOU ARE

Three sentences, in their words, from the call. Name the specific gaps they told you about. No adjectives.

WHAT THIS IS

The AI literacy duty under Article 4 of Regulation (EU) 2024/1689 has applied since 2 February 2025. National market surveillance authorities began supervising and enforcing it on 2 August 2026. Obligations for high-risk education systems were deferred to December 2027; this duty was not.

WHAT I WILL DO

1. Readiness audit – 24 indicators, six domains, completed with you
2. AI system register built and risk-classified
3. Article 5 prohibited-practice screening, including written vendor confirmations
4. Six-module staff INSET delivered on site, differentiated by role
5. Policy set adapted to your context – staff, student, parents
6. Board paper drafted and ready to table

WHAT YOU WILL HAVE AFTERWARDS

A dated evidence file containing twelve items, a signed training record for every member of staff, and a readiness position you can state in one paragraph to a governor or an inspector.

WHEN

Audit week commencing [DATE]. INSET [DATE]. Evidence file closed by [DATE].

INVESTMENT

€[2,400], fixed. Includes all materials and licences for your use.
No further costs. Invoice on completion, 30 days.

WHO I AM

Two sentences. Digital Technology teacher at an international school in the EU. [Case study line with the before/after number.]

NEXT STEP

Reply "yes" to this email and I will send the audit link and hold [DATE] in the calendar.

THREE DETAILS THAT GET PROPOSALS SIGNED

Fixed, not estimated. One number. A Business Manager can code a fixed number without a procurement process; a range triggers one.

A named date already held. "I will hold 14 October for you until Friday" creates a real, honest reason to decide, and it is true.

Reply-with-one-word acceptance. Do not send a contract to sign at this stage. An email reply is a contract. Send terms with the invoice.

PART 8 / 13

Delivery without drama

The facilitator pack has the run sheet for the day itself. This is the wrapper around it — the fortnight before and the week after, which is where engagements are actually won or lost.

T minus 14 days

Set the conditions

2 hours

- **Confirm the date in writing** with the room, the timings, and the parallel-track split.
- **Send the register questions** to every head of department yourself, via the champion. Three questions, one email. This builds the register before you arrive and makes the audit fast.
- **Confirm the DSL will attend M5.** If they cannot, move the module rather than run it without them.
- **Ask for one real assessment task** from three departments, to use as live examples in M3.
- **Get the school's actual tool list** from IT, separately from what teachers report. The gap between the two lists is your most useful finding.

T minus 7 days

Run the audit

4 hours

Delivery day

Follow the run sheet

6 hours on site

T plus 5 days

Close the file — this is where the value lands

4 hours

PART 9 / 13

Turning one day into a year

A single INSET day is a transaction. The business only works if a meaningful share of schools become annual. Build the second sale into the first delivery, before you leave the building.

BUILT INTO DELIVERY

The annual review is already in the document

Part 11 of the instrument tells them to diarise an annual review. You wrote that. When the date arrives, you are the obvious person to run it. Put the date in their calendar during the handover, with your name on it.

BUILT INTO DELIVERY

The open questions register

Every unanswered question from the day becomes a documented item with an owner and a date. Some of those are jobs. You are already the person who understands them.

NATURAL FOLLOW-ON

The student programme

Tier 2 schools have staff sorted and students unmapped. The AILit progression map is the obvious next term's work, and it is a curriculum job rather than a compliance job, which means a different budget.

NATURAL FOLLOW-ON

New-starter induction

Every September brings staff who were not there. The 90-minute induction version has to run and someone has to keep it current. That is a retainer, not a project.

EVENT-DRIVEN

When the deadlines move

The December 2027 high-risk date is coming and the rules will shift again before then. Every change is a legitimate reason to contact every past client with something useful. Keep a note of what changed and who needs to know.

HIGHEST LEVERAGE

The referral, asked for properly

At handover, when the file is done and the Head is pleased: "Is there another school you'd think of who's in the position you were in six weeks ago?" Specific question, specific moment. Offer the free twilight as thanks.

WHAT A STEADY YEAR LOOKS LIKE

Twelve Tier 2 engagements at €2,400 and eight retainers at €1,200 is around €38,000 for roughly 44 delivery days plus sales time — achievable alongside a teaching post if you cap it. Two group deals at Tier 3 pricing across three campuses each would roughly double that for less selling. The group route is where the leverage is; the single schools are how you build the credibility to get there.

PART 10 / 13

Objections, answered

Six you will hear repeatedly. Learn the shape of the answer, not the words — reciting a script is audible.

"We're waiting — the EU delayed the AI rules."

Most common

"Our DPO already handles this."

Blocker

"We already did AI training."

Common

"There's no budget this year."

Gate

"Can't we just do this ourselves? You've published the framework."

Fair

"We're not in the EU."

Qualifier

Money mechanics

Not tax advice — take the specifics to a contabilista. But the constraints shape the offer, so they belong in the playbook rather than in a footnote.

THE THRESHOLD THAT SHAPES EVERYTHING

€15,000 is a hard line in 2026

Cross the VAT exemption threshold and you lose the exemption immediately, registering and charging VAT from the month after the breach. The old grace period is gone. Six Tier 2 engagements gets you to €14,400 — so the seventh sale is a decision, not an accident.

Decide deliberately. Registering is not a disaster; schools reclaim or absorb VAT routinely. Being surprised by it mid-year is the problem.

WHERE INVOICES ARE EASIEST

Non-Portuguese clients withhold nothing

Portuguese business clients withhold at source; international clients do not. Combined with the fact that international school groups are your best buyer anyway, this points the same direction: sell outside Portugal wherever the offer travels.

SOCIAL SECURITY

21.4% on 70% of quarterly income

With an exemption for new freelancers in the first twelve months. Model this into your pricing from the start rather than discovering it at the first quarterly assessment.

PRACTICAL

Invoice on completion, 30 days

Schools pay reliably and slowly. Bursars work to monthly cycles, so an invoice sent on the 2nd is paid weeks sooner than one sent on the 28th. Never invoice in advance for a first engagement — it creates a procurement conversation you do not need.

ONE INSURANCE QUESTION WORTH ANSWERING EARLY

You are giving schools guidance that touches regulatory compliance.

Professional indemnity cover is inexpensive for a sole practitioner and several school groups will ask for evidence of it during procurement. Sort it before the first group deal rather than during it, and keep the "this is not legal advice" language in every deliverable — it is in the instrument's footer for a reason.

Capacity, and what to refuse

You have a teaching post, a directorship, a lectureship and a PhD. The binding constraint on this business is not demand — it is you. Design for that now rather than discovering it in November.

CONSTRAINT	THE RULE
Two engagements a month, maximum	Tier 2 is roughly three working days spread across a fortnight. Two concurrent is sustainable alongside a job. Three is not, and the third one is always the one that goes badly.
INSET days cluster	Schools run these in late August, October half-term, January and Easter. Your calendar will be lumpy. Sell Tier 1 audits into the gaps — they are remote and schedule freely.
Never deliver in your own school's term-time crunch	Report weeks, exam weeks, your own INSET days. Block them before you publish availability.
One bespoke request per engagement	Say yes to one adaptation, price the second. Unbounded customisation is how a productised service quietly becomes consultancy at consultancy hours and product prices.

REFUSE THESE

REFUSE

Legal sign-off

"Can you confirm we're compliant?" No. You provide a structured self-assessment and training. Certification of compliance is not yours to give and the liability is real.

REFUSE

Being their DPO

Adjacent, tempting, different job, different liability, and it swallows the time you need for the scalable work.

REFUSE

Tool procurement on their behalf

You screen vendors against nine questions. You do not choose their systems. The moment you recommend a specific product you own its failures.

REFUSE**Free pilots after the first**

One unpaid delivery, at your own school, to build the case study. After that, no. Free work signals the price is negotiable and it always is thereafter.

REFUSE**Undated scope**

"Ongoing support" without a defined boundary is unpaid work with extra steps. Retainer or nothing.

REFUSE**Rescue jobs mid-crisis**

A school that has already had an incident wants indemnity, not training. Refer them to a lawyer and stay out.

The first ninety days

Sequenced so that nothing depends on something that has not happened yet. Roughly six to eight hours a week.

WEEKS	DO	OUTPUT
1–2	Pitch the internal pilot. Book the INSET date. Run the baseline audit at your own school.	A date and a baseline number
2–3	Publish the pillar page and two supporting posts (Vol. 02). Set up the LinkedIn cadence.	A findable body of work
3–4	Build the list of sixty. Four minutes a school, one column at a time.	A researched list with next-action dates
4–5	Deliver the internal pilot. Re-audit. Collect the testimonial and write the one-page case study.	Proof, with numbers
5–6	Request every warm introduction you can. Publish the case study as a web page.	Five to ten warm conversations
6–9	Cold sequence, fifteen schools a week, four touches (Vol. 03). Track opens, replies, calls.	Sixty schools contacted, calls booked

WEEKS	DO	OUTPUT
7–10	Run discovery calls. Send one-page proposals within four hours of each.	Proposals out
9–12	Deliver the first two paid engagements. Close both evidence files properly. Ask for referrals at handover.	Revenue, and two more case studies
12	Review: which opening line worked, which tier sold, what you refused, what you should have refused.	A sharper version of all three volumes

THE SINGLE METRIC FOR THE QUARTER

Not revenue, not followers. **Discovery calls held.** Everything upstream of a call is marketing and everything downstream is delivery — the call is the only place the business actually turns. If you are holding four calls a week by week nine, the rest follows. If you are holding none, the problem is in the list or the first email, and Vol. 03 is where to look.

Scope. Operator document. Not for client distribution. Prices are starting points calibrated to the European international school market in 2026 — test them and raise them once you have three case studies.

Not advice. Nothing here is legal, tax or financial advice. The Portuguese figures in Part 11 change; confirm with a contabilista. The regulatory dates change; confirm before every engagement.

Operator series • Vol. 01 Approach • Vol. 02 Marketing • Vol. 03
Email