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AI for consultants: 12 prompts for client work

For independent consultants and people inside big firms. Twelve prompts for discovery, synthesis, proposals and slides, written so you never need to paste a client's secrets.

Before you paste anything

Client work comes with rules. Most firms approve specific AI tools and ban the rest, and most contracts limit where client information can go. So this guide works a different way: you describe the situation in general terms, and add the confidential details yourself afterwards.

- Use the tool your firm has approved. If you don't know which, ask before you start.
- Describe, don't paste: "a UK retailer with 200 shops", not the client's name.
- Never paste client documents, data extracts or people's names unless your firm says that tool is cleared for it.
- Treat every output as a first draft from a bright junior. You check it and you own it.

Discovery

PROMPT 1

Get up to speed on an industry in 20 minutes

You start with a new client on Monday and don't know the sector.

> I'm a consultant starting work with a client in **[industry, e.g. UK social housing]**. Give me a briefing: how organisations in this sector make and spend money, the five biggest pressures on them right now, the jargon I'll hear with plain-English meanings, and the questions a smart outsider should ask in week one. Tell me which points I should verify, because your information may be out of date.

Tip: Ask it "what would an insider roll their eyes at in that summary?" to find the gaps.

PROMPT 2

Write a stakeholder interview guide

Before discovery interviews.

Write an interview guide for a 45-minute discovery interview with a **[role, e.g. head of customer service]** at **[type of organisation]**. We're looking at **[the problem area, described generally]**. Include an opening that puts them at ease, ten open questions that move from their day-to-day to the root causes, follow-up probes for each, and a closing question that surfaces what I didn't think to ask.

PROMPT 3

Map a process from a description

Someone has explained how a job gets done, and you need it on one page.

Here's a general description of how a process works at a client: **[describe the steps in your own words, with no names or confidential figures]**. Turn it into a numbered process map as a table: step, who does it, tool used, rough time, and what can go wrong. Then mark the steps where delays, rework or handovers are most likely.

Tip: This is the heart of discovery. Each step, who does it, which tool, how long.

PROMPT 4

Spot where AI or automation could help

You have the process map and the client asks "where could AI help?"

Here is a process as a list of steps: **[paste your anonymised steps]**. For each step, say whether it's a good fit for AI help, simple automation, or should stay with a person, and why. Be cautious: flag any step where errors would be costly or where personal data is involved. Finish with the two changes likely to give the most benefit for the least risk.

Synthesis

PROMPT 5

Turn interview themes into findings

After interviews, with a page of your own notes.

I've finished discovery interviews. These are the themes I heard, in my own words: **[list them, anonymised]**. Group them into four or five findings. For each, write a one-line headline that states the "so what", the evidence I should cite, and the question a sceptical executive would ask.

Tip: Write the themes in your own words first. Don't paste raw transcripts with names in.

PROMPT 6

Pressure-test your recommendation

Before you show the client.

My recommendation to a client is: **[describe it generally]**. Act as a sceptical finance director. Give me the eight hardest questions you'd ask, the weakest point in my logic, and what evidence would change your mind.

PROMPT 7

Build an options table

The client needs to choose and you want to be even-handed.

A client needs to choose between these options: **[list them]**. Their priorities are **[e.g. cost, speed, risk, staff impact]**. Build a comparison table scoring each option against each priority, with a one-line reason for each score. Then state what would have to be true for each option to be the right choice.

Proposals and slides

PROMPT 8

Draft a proposal structure

You've had a good first call and need to send something by Friday.

Draft a proposal outline for a consulting project. The client is **[type of organisation]**. Their problem: **[in a sentence]**. What I'd do: **[approach, in a few lines]**. Timescale: **[weeks]**. Write: a summary of their situation in their words, objectives, approach in phases with what they get at the end of each, what I need from them, and assumptions. Leave fees as a placeholder.

PROMPT 9

Outline a deck with a storyline

You have findings and a blank slide.

Outline a **[10]**-slide deck for **[audience, e.g. an executive team]**. The one thing I need them to decide is: **[decision]**. My main findings are: **[list]**. Give each slide a headline that is a full sentence making a point, the one chart or evidence it needs, and a note on what to say. Put the recommendation on slide 2.

Tip: Read the headlines alone, top to bottom. If they tell the story, the deck works.

PROMPT 10

Write the executive summary

The last thing you write, and the only page some people read.

Write a one-page executive summary. Situation: **[two lines]**. What we found: **[three points]**. What we recommend: **[the recommendation]**. What it costs and returns: **[in general terms]**. What we need decided: **[the ask]**. Plain English, no jargon, under 250 words.

Running the engagement

PROMPT 11

Turn meeting notes into actions

Straight after a client meeting.

> Here are my notes from a client meeting, with names replaced by roles: **[paste]**. List the decisions made, the actions with an owner and a date for each, the open questions, and anything that sounded like a risk. Then draft a short follow-up email to the client confirming them.

PROMPT 12

Write the weekly status update

Friday afternoon.

> Write a weekly status update for a client project. Done this week: **[list]**. Planned next week: **[list]**. Risks or blockers: **[list]**. Decisions needed from the client: **[list]**. Keep it under 150 words, lead with anything they need to act on, and use a calm, factual tone.

Map a discovery piece, step by step

Tell doingit.today how one piece of client work really goes, from first call to final deck. We'll map it in plain steps and mark where AI, or a tool your firm already approves, could help.

Free to start. No tech background needed.

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Keep going

- ✓ Share what never to paste into AI with your team.
- ✓ The email and meetings prompts cover the admin around the work.

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