

10 AI tools for consultants to get everyday tasks done faster and better

Written May 28, 2024, by Stefan Debois

Have you ever been to a museum, hoping to become more well-versed with a specific field that interests you? But then, one-third through the tour, you see other visitors using an audio-guide, while all you have is a glorified leaflet... That feeling.

In a way, it's similar to what professional service providers may feel when they hear about **all the things AI can now automate** for their reluctant prospects and lazy competitors. If you can't beat them, join them. Cherry-pick the solutions that are useful to *you* and create *your* competitive advantage. Here are 6 different AI tools to inspire your consultancy:

- [Neurons](#)
- [ValidatorAI](#)
- [Gong](#)
- [Henchman](#)
- [ChatGPT](#) (of course)
- [RingSenseTM](#)

Update: AI growth agency [Brandsome AI](#), recently picked up on this article. They equip customers with custom sets of AI tools to meet their needs. They were so nice to suggest **4 more AI tools** for me to add in this article:

- [Taplio](#)
- [Perplexity](#)
- [Chatbase](#)
- [Notion AI](#)



Preface: Various AI tools for consultants of different types

Before I move on, let me shortly clarify what different types of consulting, and types of AI I'll be discussing. I'll focus on **consulting services that don't inherently involve the use of (high-end) technology**. As for AI, the examples I'll bring up will mostly fit into one or both of the following two key AI categories: machine learning and natural language processing (NLP).

“Rating” the different AI tools

For each tool, I will also give you an indication of the quality. Bear in mind that this is my personal point of view and that these tools evolve super fast nowadays. So, definitely don't just take my word for it, and also experiment with it yourself.

It's also useful to note that **AI is supposed to facilitate** our work. Even if that means **getting 80% or maybe just 50% of the job done**, that's quite good. Your own common sense, plus a bit of AI, can already imply a big step forward, so I suggest starting with that before trying to *run* with it. Don't take these ratings *all* too seriously. **The key is to find the right way to apply the tool to your particular situation.**

For each tool, I'll rate the following 3 categories:

- **Ingenuity:** How creative or well-thought-of is the application in solving a particular problem or challenge?
- **AI quality:** How ample or relevant is the data the artificial intelligence is trained on to identify patterns?
- **User experience:** How easy or comfortable is it to use the tool? Note: I will not provide this category rating for tools I haven't been able to play around with sufficiently in order to give a relevant judgment.

1. AI tool for marketing consultants: Predicting customer behavior with Neurons

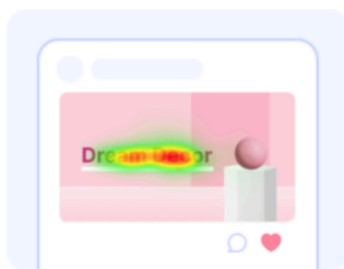
In this digital age, if you're a **marketing consultant** or advertising agency, impressing clients with creative prowess alone doesn't cut it. Clients' decision-makers want to see results. A/B testing is a common way to navigate toward the best possible results, but it often still leaves stakeholders somewhat frustrated.



behavior. When a convincing path forward is finally agreed on, a significant part of the project budget is already spent. Hard work for you, moderate satisfaction for the client.

Predict by Neurons is an AI-powered tool to take much of that anxiety out of the equation. Its artificial intelligence model is built on a broad neuroscience database of eye-tracking based on studies conducted with organizations worldwide. The result? **Accurate prediction of customer behavior** in seconds. That means better and more consistent creative delivery before projects go live, to build trust with clients.

Maximize creative performance with AI predictions



Boost brand awareness

Draw attention to your ads and drive brand awareness and activation with high ROAS.



Drive in-store & online sales

Improve sales & increase brand strength with enticing packaging & in-store designs.



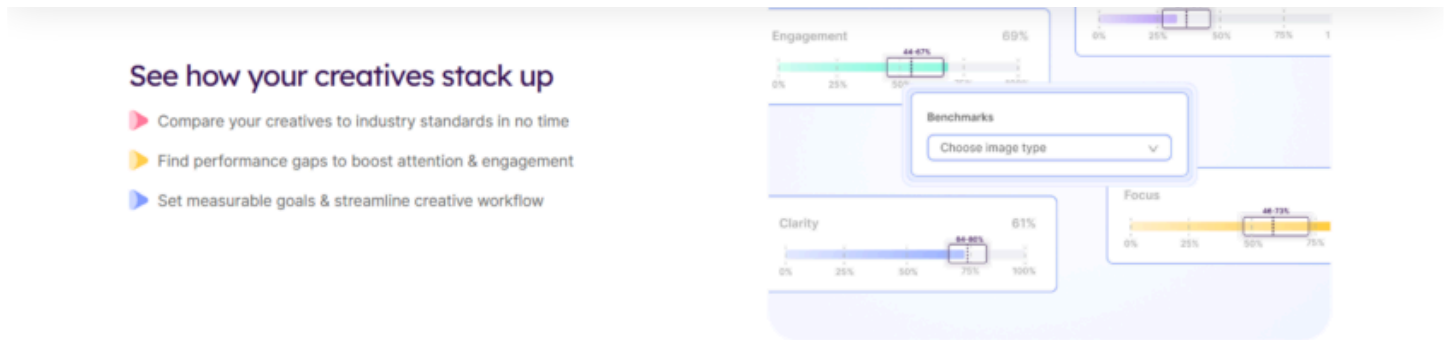
Improve user engagement

Optimize your website & online store for more conversions and lower cart abandonment.

Source

A bullet-proof way to develop your creative assets.

For an agency, client satisfaction and trust are essential – just like they are for all other types of consulting. But in my view, **the best solutions for consulting firms** don't entail benefits for clients alone. **They contribute to the development of your firm's own assets as well.** Obviously, a tool like Predict – which also allows you to benchmark creative work with industry standards – is perfect to build best practices, even when not working on a client project.



Source

A firm's assets also include human capital. For an advertising agency, having and keeping talented creatives on board is absolutely crucial. In that sense, Predict provides you with an objective and accurate way to test, evaluate and develop the effectiveness of the creative work your people are delivering. The learning context is safe-but-real because, again, there's no risk of jeopardizing client satisfaction, **because the results come in, pre-launch.**

Rating

Ingenuity: ★★ ★

I was already a fan of eye-tracking tools in general because it's a very raw measurement of human behavior. The predictive aspect of Neurons makes it really valuable for marketing purposes.

AI quality: ★★

It seems like the AI is not training itself on an unlimited database, but rather on Neurons' own database. That still means more than 120,000 consumers worldwide right now, based on what Neurons communicates. Given the interesting variety of customers that will only keep growing, I give it two stars.

2. AI tool for strategic consultants: Validating ideas with ValidatorAI

A typical ideation process in strategic consulting starts with the definition of a problem or opportunity for the client. Next, useful data are gathered and analyzed to develop a more profound understanding of the

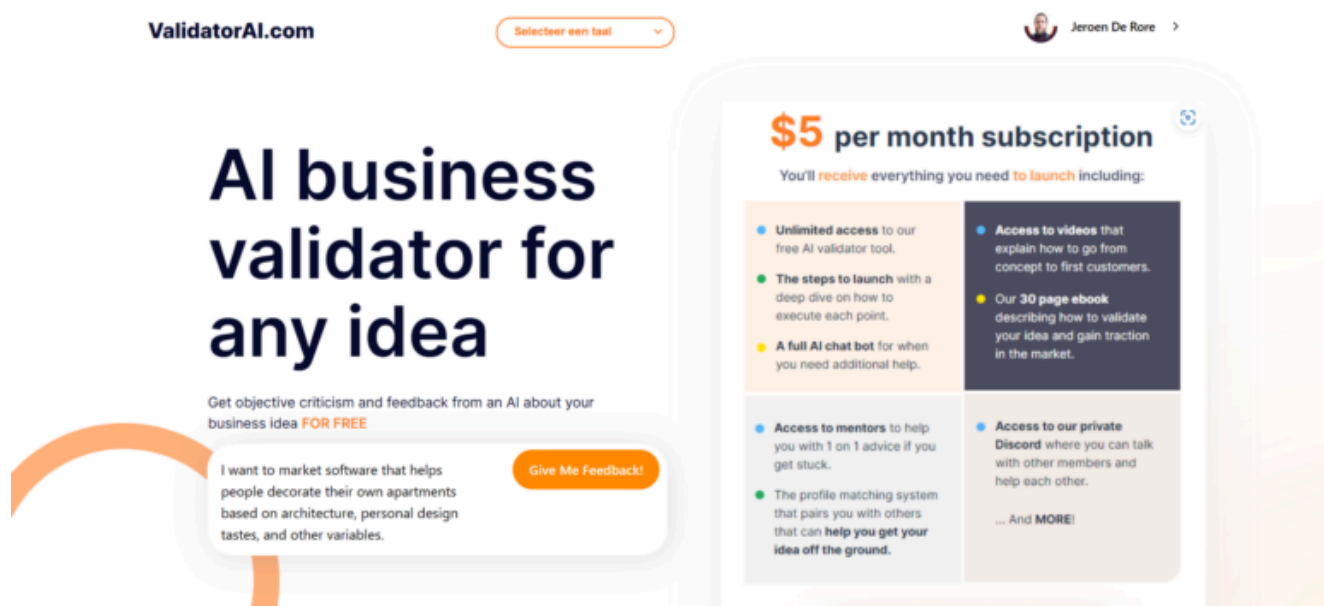


Similar to all creative endeavors, this initial ideation step is often **based on the consultants' inherent talent and experience**: the unique instinct, so to speak. However, wherever human instinct is involved, flaw lurks around the corner. That's why potential solutions need to be evaluated against available data. It comes as no surprise that as the CEO of Pointerpro I am a big proponent of **developing quality maturity assessments**. I'm also an advocate for innovation and digital creativity. In that sense, **ValidatorAI** attracted my attention the other day.

This tool's target audience mainly consists of entrepreneurial spirits that want some **guidance in their start-up phase**. But I suppose it could just as well be adopted for intrapreneurship in a larger corporation, and **maybe benefit strategic consultants in the very early stage** of certain projects. After all, the tool is designed to evaluate the strength and validity of strategic decisions using advanced analytics and machine learning (**ML techniques**). It can help to identify areas where the proposed strategy may fall short, and suggest alternative approaches based on data-driven insights.

How to validate a new business idea?

For the sake of this article, I took ValidatorAI for a little test drive. Let's have a look – and don't you dare to steal any of my ideas. 😊



Source

I asked for feedback on the following: **"I want to market software that helps people decorate their own apartments based on architecture, personal design tastes, and other variables."** Now, unlike myself and some friends during a cozy dinner the other night – accompanied by a few glasses of red wine, I should

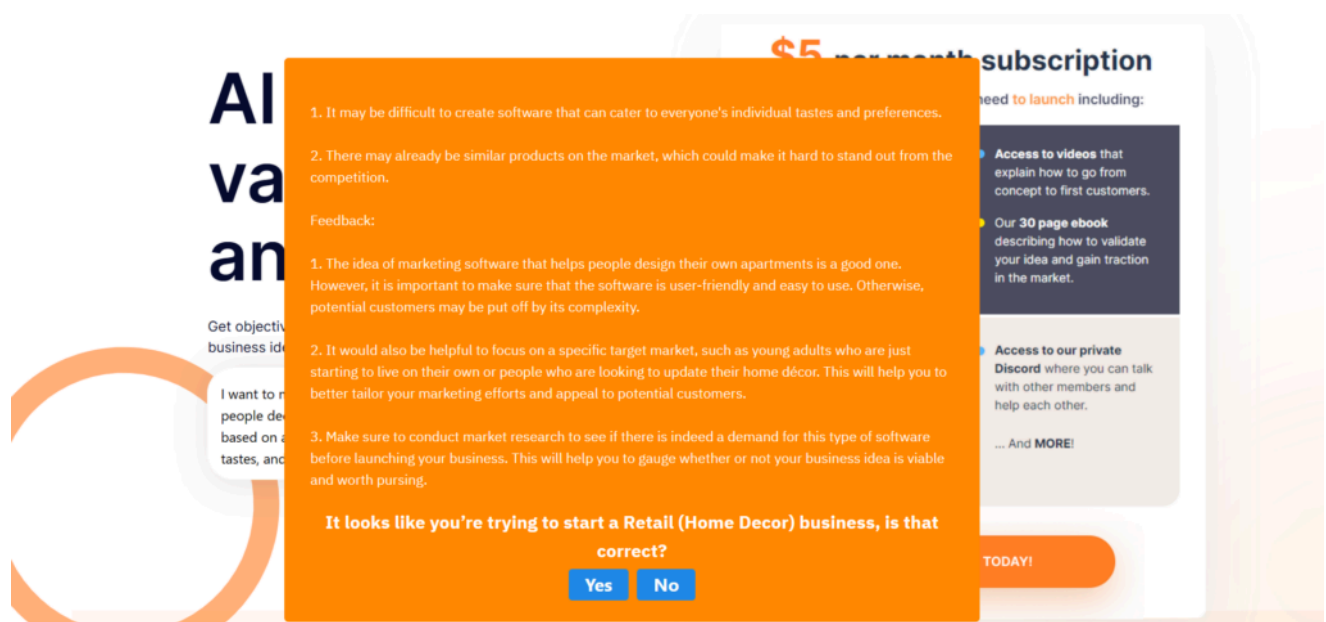


1. It may be difficult to create software that can cater to everyone's individual tastes and preferences.
2. There may already be similar products on the market, which could make it hard to stand out from the competition.

Nonetheless, the feedback also proves that the AI tool truly understood what I was trying to go for – with some good general advice.

1. The idea of marketing software that helps people design their own apartments is a good one. However, it is important to make sure that the software is user-friendly and easy to use. Otherwise, potential customers may be put off by its complexity.
2. It would also be helpful to focus on a specific target market, such as young adults who are just starting to live on their own or people who are looking to update their home décor. This will help you to better tailor your marketing efforts and appeal to potential customers.
3. Make sure to conduct market research to see if there is indeed a demand for this type of software before launching your business. This will help you to gauge whether or not your business idea is viable and worth pursuing.

In fact, ValidatorAI seemed to already have a label to attach to my business idea. Hence, the question redirected to me: "It looks like you're trying to start a Home Decor Software Business. Is that correct?"



Source

Well, it sure seemed like my answer would have to be "Yes."

Here are the concrete next steps, ValidatorAI generated for me.

1. Develop a Plan: The first step to starting a retail business is to have an **effective business plan** in place. This plan should include objectives, strategies, and tactics for achieving your desired results. It should also include a budget, timeline, and marketing and operational plans.



3. *Register Your Business:* Once you've chosen a business structure, it's time to register your business with the appropriate government agency. Depending on the type of business you are starting, you may need to register with the state, county, or federal government.
4. *Obtain Necessary Licenses and Permits:* Depending on the type of business you are starting, you may need to obtain specific licenses or permits. These may include a business license, a zoning permit, and other permits related to the type of products you will be selling.
5. *Find a Location:* Choosing the right location can be one of the most important factors in the success of your retail business. Consider factors such as (1) foot traffic and visibility, (2) the local market, and (3) costs associated with the location.
6. *Buy Equipment and Furnishings:* Once you have a space, you'll need to purchase equipment, furniture, and any other items necessary to run your business. Consider the features and functionality of items before purchasing to ensure that they fit your business's needs.
7. *Market Your Business:* Once your business is up and running, you'll need to create a marketing strategy to attract customers. Consider both traditional and digital marketing approaches to increase the visibility of your business.

Here are the steps to take to launch your Retail (Home Decor) business.

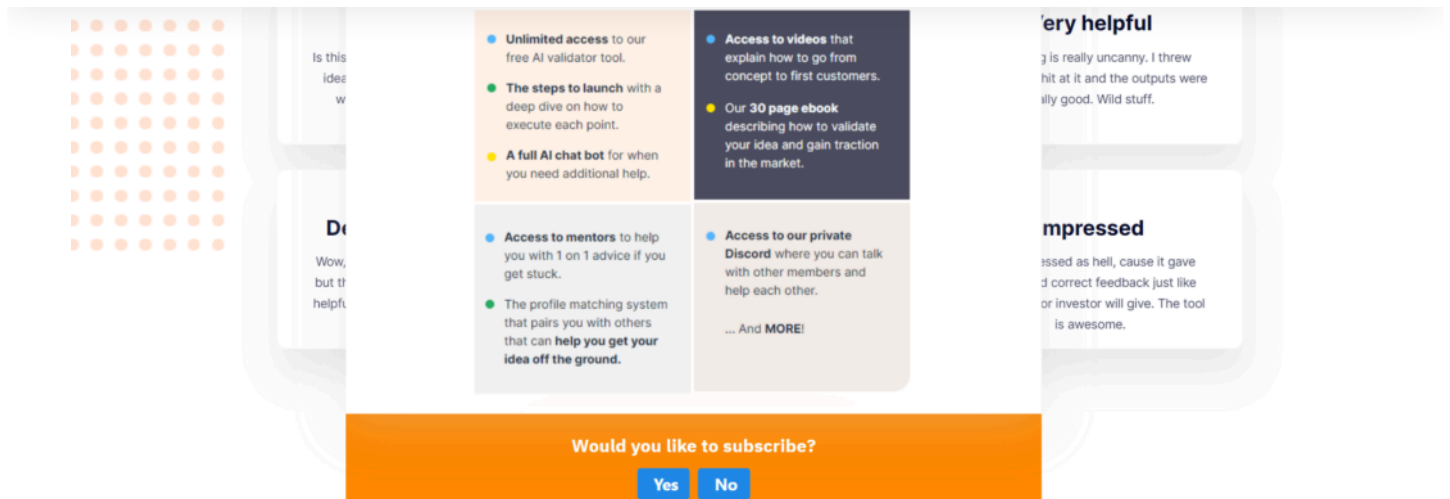
1. **Develop a Plan:** The first step to starting a retail business is to have an effective business plan in place. This plan should include objectives, strategies, and tactics for achieving your desired results. It should also include a budget, timeline, and marketing and operational plans.
2. **Choose a Business Structure:** Once you've identified your goal, it's important to determine what type of business structure you'll need to move forward. Choosing the right entity is critical to the success of your business.
3. **Register Your Business:** Once you've chosen a business structure, it's time to register your business with the appropriate government agency. Depending on the type of business you are starting, you may need to register with the state, county, or federal government.
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Join the 124415 people that are using our tools for their startup!

If you want to pursue this, let's get started below.

Source

I then got the option to subscribe for further guidance on my journey. One thing I definitely like about what's proposed is the access to more guidance from mentors – I suppose strategic consultants themselves. AI offers great guidance based on generalized knowledge, but I also strongly believe there's an everlasting need for personalization.



Source

Rating

Ingenuity: ★ ★ ★

As an entrepreneur myself, I can't help but have sensitivity for a solution like this one. When you have entrepreneurial ideas, feedback is so crucial. **Pointerpro** started out as a survey tool, for instance, and it's thanks to thorough searches for feedback that we evolved into **a tool that delivers personalized advice on autopilot**. Giving entrepreneurial spirits access to AI to investigate and validate their ideas seems highly valuable to me.

AI quality: ★

I wasn't able to figure out much about the database Validator.AI trains itself on, so I suspect it may not be the tool's strong suit at this moment in time. That said, I found the answers and suggestions I received relevant. So it's definitely promising.

User experience: ★ ★

The tool is simple but intuitive and actually, between the time I first discovered ValidatorAI and the time I wrote this article, it got one big very nice design update and a smaller one right afterward. That shows the user is being considered actively and continually.



Get your efficiency to pay off.

Evolve from hourly-based to fixed pricing.

This mini-guide will get you started.

Download for free



*No contact information required

3. AI tool for different types of consulting firms: Understanding clients more effectively with Gong

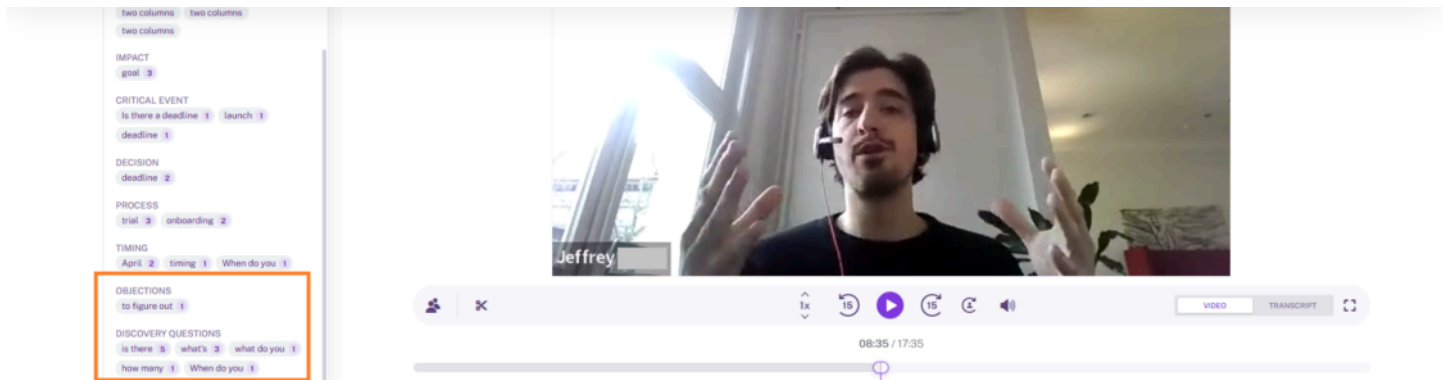
Listening to prospects and clients is important in any consulting business, to **identify needs and opportunities**. It's no secret that client interviews are time-consuming, however. In a firm where different consultants have numerous sales calls per week, there's an opportunity to learn from each other's insights. However, due to lack of time, that opportunity is seldom seized.

At Pointerpro we have a sales team ourselves. And for us too, input from prospects and clients is highly valuable to improve our software platform. One AI tool we benefit from in that regard is **Gong**.

Sales call analyses

Gong is a conversation intelligence platform that uses **natural language processing** (NLP) and machine learning algorithms to analyze sales calls and provide insights to sales teams.

The machine learning algorithms analyze the content of the conversations. As a result, a user can revisit and learn from useful parts of conversations, like **objections or discovery questions** from potential customers



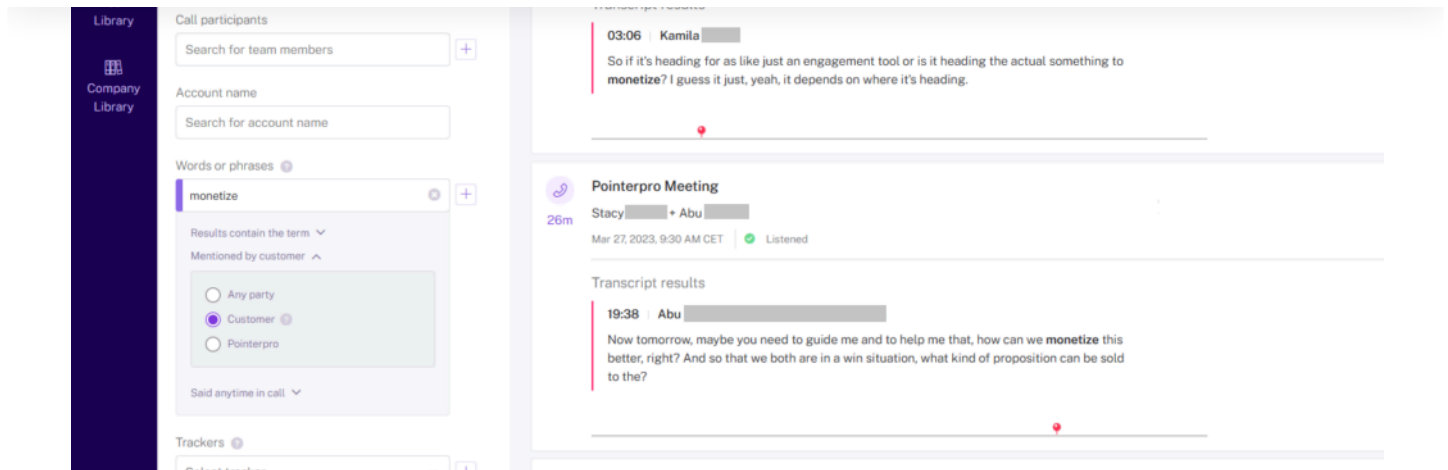
Based on this, Gong can help you develop sales strategies for higher success rates.

Of course, these analytical features aren't exclusively useful to sales reps. For instance, our marketing and product development teams at Pointerpro can search for – or subscribe to – keywords.

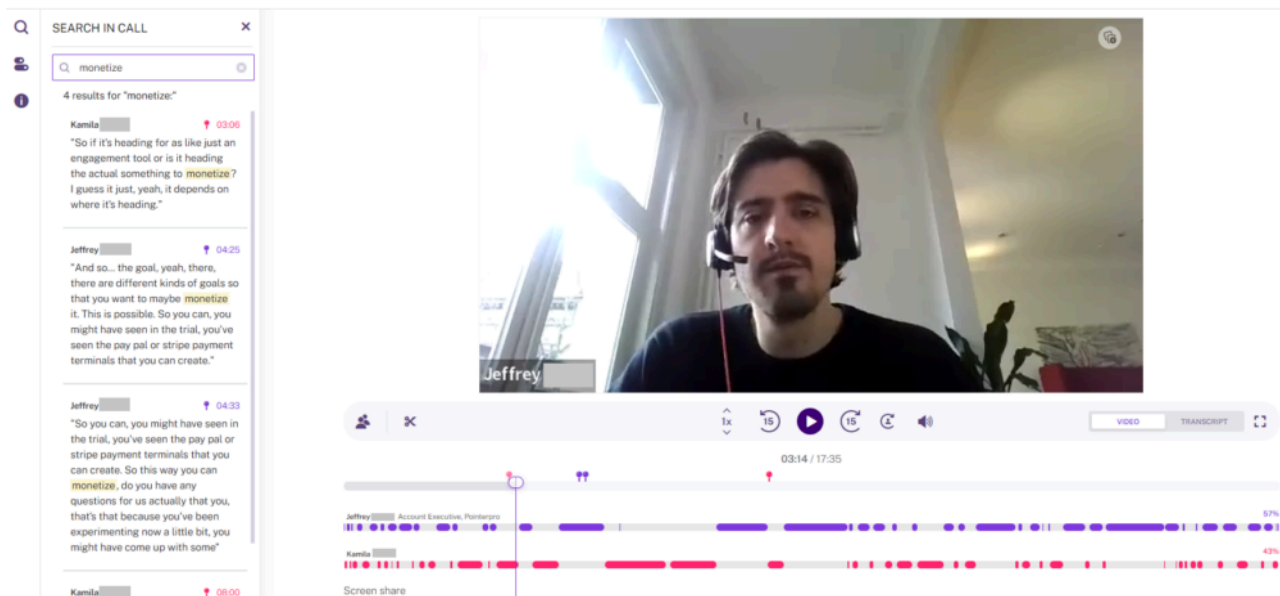
Here's a concrete example:

So, the product of my company commercializes a software platform, used by a wide variety of consulting professionals. They use it to advise more of their clients, more efficiently. With our platform, they **build digital questionnaires and associated report templates that auto-generate personalized advice to respondents: smart assessments**, if you will. Recently we added a new solution to the platform that, among other things, allows our users to **monetize** these smart assessments through their network. This solution is called: **Distribution Portal**.

Any member of our marketing or product development team can keep their finger on the pulse. In Gong, they search for the keyword "monetize" for example. Gong then provides an overview of the exact moments in different sales calls in which the word "monetize" was mentioned. The same can be done for "Distribution Portal" or any other term.



The team member can then open this instance and revisit the conversation around the topic of monetization.



This allows him or her to literally read into what the potential customer had to say about the topic. Our SEO marketing specialist, for instance, can get inspired about how to have our platform show up in online search queries by companies with the intention to monetize their consulting and advice services.

We haven't been using Gong for very long – although everyone's very enthusiastic about it already – so hopefully we can share more best practices soon.

Rating



similar tools out there. What sets Gong apart is it has thought through **a lot of aspects for sales teams**, beyond what I discussed above. So definitely worth two stars.

AI quality: ★ ★

Gong is very good at recognizing and identifying useful keywords and patterns. I think its AI is almost inherently of good quality because so many sales calls simply take place every day and Gong has a broad user base, worldwide. The AI clearly benefits from that machine learning.

User experience: ★ ★ ★

The tool has a lot to offer. It's really worth diving into because I couldn't possibly cover everything in this article. Gong also facilitates interaction between co-workers, within teams, but also across teams. At Pointerpro we've linked up Gong with Slack so that marketing team members get notified there whenever relevant things come up. Conclusion: very useful and very smooth.



Questions or remarks?

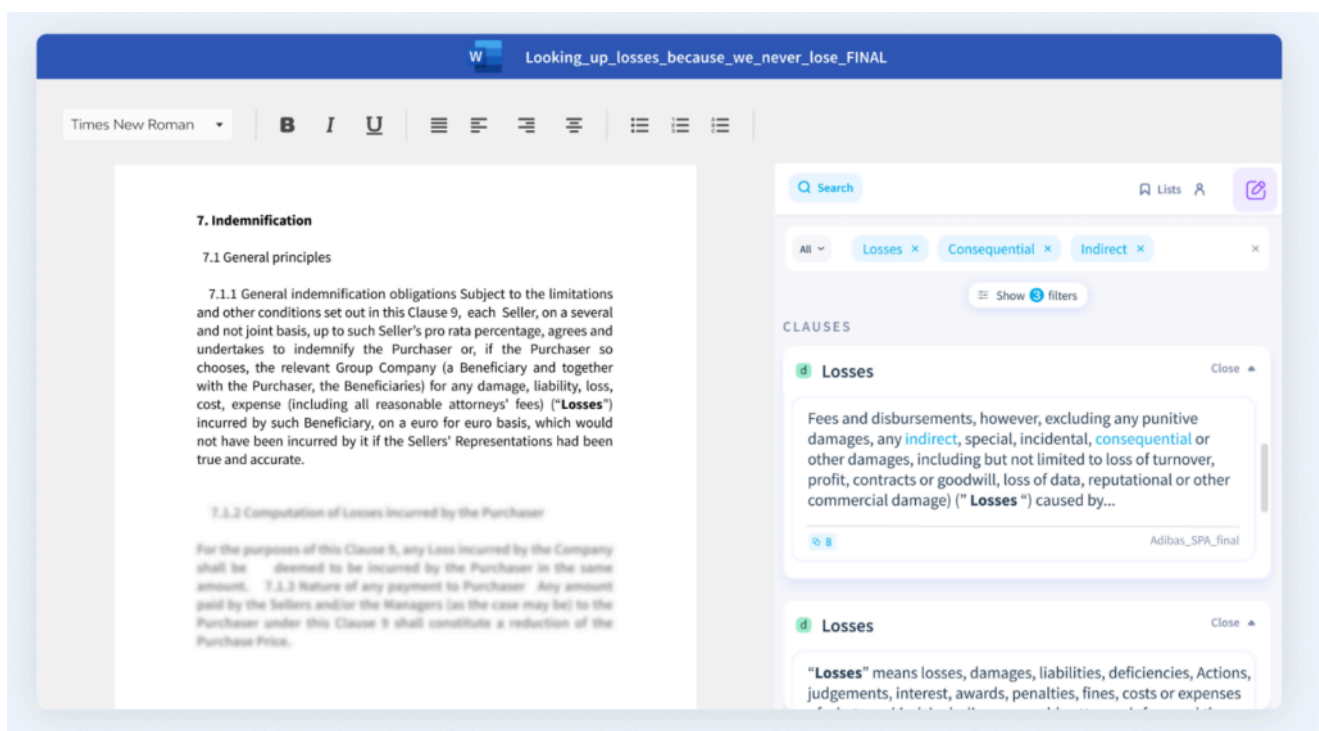
We try to keep our blog articles up-to-date, but technology evolves very quickly of course. If you notice anything inaccurate in my discussions of the AI tools for consultants here, don't hesitate to get in touch. If you just want to connect and exchange ideas or know more about the Pointerpro platform, I'm more than happy to answer all your questions too.

Contact me

4. AI tool for legal consultants: streamlining your contract review with Henschman

Few industries scream administration and bureaucracy louder than the law firm sector. The **collective knowledge of a consultancy team should be the leverage to produce better legal documents** for clients. But in reality, when consultants in firms are creating contracts, for instance, they struggle to remain consistent with precedents or find clauses and other pieces of information.

Henschman is a legal tech tool that uses artificial intelligence to analyze contracts and extract key terms, clauses, and data points automatically. It's designed to help law firms and legal departments streamline their contract review and management processes. The software can also identify potential risks and inconsistencies in contracts, allowing lawyers to focus on high-priority issues.



Source

This plug-and-play tool also offers advanced search and reporting features, making it easy to find and analyze specific contract data. AI-based recommendations help legal consultants enrich contracts with thoughtful information. Basically, by **automating manual contract review processes**, Henschman helps legal teams save a whole lot of time, as this video illustrates – with a sense of humor that makes it more than worth the share:

Searching for a specific clause - With or Without Henchman



AI applied safely and soundly to your own database

I love technology, and I'm really excited about AI emerging more than ever. Again, what I believe in the most, is when tech tools allow users to apply the tools to their specific situations and **leverage their own knowledge**. In my book, that's another thing Henchman has going for it.

The tool integrates with the legal consulting firms' existing contract management systems and extracts data from their contracts automatically. The software does not access or analyze data from any other sources, **safeguarding the privacy and maintaining identity security of all customers' information**. Henchman uses advanced encryption and security measures to protect data from unauthorized access or breaches. This ensures that the customer's data is kept confidential and secure at all times, while still providing the benefits of AI-powered contract review and analysis.

Rating

Ingenuity: ★ ★

Legal tech is a common term for a reason. Big wordy databases, which legal firms have, seem to scream out for AI-based help to increase efficiency and accuracy. The existence of tools like Henchman is logical, but Henchman does a good job of being more than just a contract drafting tool. It becomes an integral part of knowledge management.

AI quality: ★ ★



for the firms. It allows them to leverage their own knowledge to gain an advantage over competitors.

5. AI tool for different types of consulting firms: writing social media posts with ChatGPT

I'll continue this little tour with the one tool that has sparked the current global excitement around AI. I'm of course talking about ChatGPT. Compared to DeepSeek R1, which is a more budget-friendly solution, ChatGPT has no problems with security flow and might be a much better choice for content creation and nuanced analysis. Following up on your clients' and prospects' needs, no doubt, takes up most of your time and energy.

After all, they're your bread and butter. But as any good housekeeper knows, those groceries need to keep coming in if you want to keep everyone fed. That means you need to be **showing up regularly** in the supermarket. As a consultant, your go-to 'supermarket' is **LinkedIn**. And when you're there, you need to occupy some space before other hungry firms completely empty the aisles before you.

So, you need to let people know you're there. There's no lack of **LinkedIn growth strategies** and specialists, but in the end, it comes down to publishing content. That means writing. ChatGPT can help you with that, as you've undoubtedly heard already. Let's look into some tips to make it happen.

How to prompt ChatGPT into writing good LinkedIn copy

ChatGPT is a powerful language tool and has the World Wide Web's data at its disposal to base output on. However, what really makes the difference with anyone else trying to achieve the same thing as you, is the **quality of your input**. Here is the minimum you should be sure to take care of so that ChatGPT can craft something targeted, engaging, and in line with your vision and goals:

- **Establish your tone of voice:** For instance, are you looking for a professional, authoritative tone, or a more casual and conversational tone?
- **Define the target audience:** What are their demographics (age, gender, location, interests, etc.)? What kind of content do they engage with on social media? What are the challenges that they would like to solve?
- **Content themes and topics:** What are the specific themes or topics that you want to focus on? Are there any current events or trends that you want to incorporate into your content?



Example: writing a month's worth of content for thought leadership

As a consultant, gaining the trust of your audience is essential. As clients, they will be paying for what's in your head: your expertise, experience, and ingenuity. On LinkedIn, you can give them a little taste of it.

But... you have a busy month ahead. So, let's ask ChatGPT to prepare 8 posts. **Let's imagine you're a leadership coach**, for this example, and you basically want to position yourself as someone inspiring, without trying to sell yourself too directly. Here's what you might tell ChatGPT:



I would like to write 8 social media posts on my personal LinkedIn for the month of June.

Here is some information to help you write it:

- Tone of voice: I want to sound professional but accessible and even slightly funny.
- Target audience: female professionals in leadership positions, age 30 - 55, working in the United States, interested in public speaking, human values, and the topic of everyday productivity.
- Focus topics for my posts: inspiring female speakers, effective altruism, productivity hacks and other related topics
- Objective: establish thought leadership

Source

Here's the first input from ChatGPT. A decent start. But it's worth challenging the tool to make it better, still.



1. Productivity hack: Start your day by setting three goals, big or small, and commit to achieving them. You'll feel more accomplished and focused throughout the day. #productivity #hacks #leadership
2. Effective altruism: As leaders, we have a responsibility to use our skills and resources to make a positive impact on the world. Let's prioritize supporting causes that align with our values and have the greatest potential for good. #altruism #leadership #impact
3. Inspiring female speaker alert: Have you heard of Luvvie Ajayi Jones? Her TED Talk on "Getting comfortable with being uncomfortable" is a must-watch for anyone interested in personal growth and leadership development. #femaleleadership #speakers #TEDtalks
4. Prioritizing self-care isn't selfish, it's necessary for productivity and success. Take a break, go for a walk, or do something you enjoy today. Your future self will thank you. #selfcare #productivity #leadership
5. How do you motivate yourself to stay productive during busy periods? Share your tips in the comments below! #productivitytips #leadership #success
6. Effective communication is key to success in leadership positions. Take the time to actively listen and understand others' perspectives, and communicate your own thoughts clearly and respectfully. #communication #leadership #success
7. The power of community: Surround yourself with supportive and like-minded individuals who can offer insights and advice. Collaboration and mutual learning are essential for growth and success. #community #leadership #growth
8. Did you know that studies show taking short breaks throughout the workday can actually improve productivity? Take a few minutes to stretch, meditate, or even chat with a colleague. Your brain will thank you. #productivity #hacks #selfcare

🔄 Regenerate response

Send a message.



Free Research Preview. ChatGPT may produce inaccurate information about people, places, or facts. [ChatGPT Mar 23 Version](#)

Source

I would like to make the answers sound a little more personal, provide some bullet points with more concrete tips and finally, **I would like a suggestion of a visual to go with each post.** So, let's prompt:



Sure! Here are the revised social media posts with more personal touches, concrete tips, and visual suggestions:

1. Productivity hack: Start your day by setting three goals, big or small, and commit to achieving them. You'll feel more accomplished and focused throughout the day. My go-to goals are:
 - One task that will move a big project forward
 - One task that requires creativity
 - One task that I've been putting off

What are your go-to goals? #productivity #hacks #leadership

Visual suggestion: A photo of a daily planner with three highlighted tasks.

Source

As you can see, what I'm getting is already quite substantial. I might still tweak some text here and there, I still need to find some visuals based on the suggestions, and I still need to publish. But either way, I'd say about 70% to 80% of the work is done. And this literally took five minutes of my time.

Rating

Ingenuity: ★

It's probably unfair to give ChatGPT "only" one star on any point. Why then? Simply because it's generic and very broadly applicable. That's a positive point, of course. But it also means that the creativity needs to come from the user. There's an enormous amount of ways to make use of ChatGPT, but everything happens in the chat format itself.

AI quality: ★ ★ ★

Not much to say here. Feeding itself on the World Wide Web, obviously, ChatGPT's AI is among the strongest AI out there. The quality of feedback on the diversity of subjects speaks for itself.

User experience: ★ ★ ★

Using ChatGPT really is like having a productive conversation with the colleague of your dreams: one that's extremely knowledgeable and skillful, and at the same time grants you to take credit for the work.

😊 In the end, it's a simple chat format, but everything works so accurately that the user experience is phenomenal. With ChatGPT, less truly means more.

6. AI tool for sales consultants, managers, and teams: RingCentral RingSense™ for Sales

For everybody in the world of sales, the art of the conversation is paramount. Every interaction with a prospect is an opportunity to build rapport, understand needs, and ultimately close deals. But with busy schedules and complex sales cycles, there's only so much you can do, right? I know it can be challenging to remember every important detail and make every conversation personal.

Cue RingSense™ for Sales, an AI-powered platform that incorporates conversation intelligence technology into business communications and collaboration. While RingCentral is best known for its cloud-based unified communications solutions, this tool is a nice addition to the company's growing AI portfolio.

How can you leverage AI to boost sales efforts?

"...everyone can stay focused, and AI handles the rest." With a promise like that, I would expect nothing but reliable, innovative solutions from RingCentral. Safe to say after tinkering with the tool, I found several ways to make work easier for sales consultants and teams.

Here's how:

- **Automated reports and scoring** – Instead of wasting time manually jotting down notes during a call, salespeople can get AI-generated summaries, notes, and **transcripts**. This enables teams to focus on active listening and make more effort to get positive results. Additionally, with automated scoring, managers can pinpoint conversations that need the most attention without sifting through thousands of conversations.
- **Keyword tracking** – Analyzing calls and recordings is tedious, but with AI, it doesn't have to be. AI automatically tracks important keywords, phrases, and topics and uses this data to identify your team's effectiveness in handling objections and competitor mentions and how these impact your customer relationships. This gives salespeople more time to focus on coaching and strategy.
- **Sales planning** – Armed with a detailed pipeline overview, you can see exactly where each deal stands, track team progress against historical data, and accurately forecast sales. This empowers sales teams to prioritize high-probability deals, optimize resource allocation, and ensure proper coverage at all times.



Calls

Trackers

Deals

Coaching

Library

Roger Elliot

Senior Sales Manager

Overview

Transcript

Trackers

Q&A

Next steps

Comments

Feedbacks

Scorecards

Highlights

DEAL INFO

Company name
Acme corp.

Deal Stage

Review a deal →

Host conversation metrics

Sentiment
Positive

Energy
96.9

Talk time
8 min

Longest monologue
1 min

Filler words
0.000 Words/min

at Best Credit First

at Colton's Place

Topics

pricing, differentiators, trusted vendor, buying committee, ROI, contracts, product features, support policies, competition, long-term value, initial investment, recurring monthly charge, savings

Summary

Chris at the Acme corp. is interested in purchasing 200 licenses for his customer success team. He was most interested in the conversational AI functionality that would allow his teams to better empathize with clients.

Sara Bennett

Let's figure out how to win over their CISO on our security practices.

Ben Wilson

Andrea Ferrera

Esther Howard

Type your message here...

Source

Available as an add-on to [RingCentral RingCX](#), this AI-infused tool has the potential to become a “must-have” weapon in the sales industry. It has the capability to boost team productivity, deliver actionable insights, and automate repetitive tasks.

Coaching

Feedback

Scorecards

Power Skills

Keep track of coaching time and performance metrics for your team.

Activity

20 calls +20%
You have reviewed less calls than the last month

Scorecards

Overall Scorecard
Account Review

Leaderboard

Agents	Average Score	Score cards	Calls Count
Scott McGee	★★★★★	3	3
Chip Ryan	★★★★★	1	1
Peter West	★★★★★	0	0
Kyle Gardner	★★★★★	0	0

CALLS LISTENED

CALLS SCORED

CALLS WITH FEEDBACK

CALLS WITH COMMENTS

2 0.00 calls	3 + 1.00 calls	2 + 2.00 calls	2 + 2.00 calls
0 0.00 calls	1 0.00 calls	0 0.00 calls	0 0.00 calls
0 0.00 calls	0 0.00 calls	0 0.00 calls	0 0.00 calls
0 0.00 calls	0 0.00 calls	0 0.00 calls	0 0.00 calls

SB

Rob Lodge

Sales Manager, SB

SN

Scott McGee

Account Executive III SB

PR

Chip Ryan

Account Executive III SB

SW

Peter West

Account Executive III SB

KG

Kyle Gardner

Rating

<https://pointerpro.com/blog/ai-tools-for-consultants/>

20/38



solution specifically designed for the sales environment. The tool's ability to provide detailed insights and streamline sales processes is particularly valuable in a field where time is money.

AI quality: ★ ★

RingCentral leverages a vast amount of call data to train its AI. This gives me confidence in the quality of AI-produced historical and real-time reports it generates. If you're a sales consultant, manager, or supervisor, this is helpful in training new team members and maintaining a high standard of sales excellence.

User experience: ★ ★ ★

Similar to other RingCentral offerings, this is user-friendly and intuitive. Plus, the platform seamlessly integrates with other sales and customer relationship management (CRM) systems, making it easy to incorporate into existing workflows. Overall, it's a three-star experience for me.

How to build automated assessment reports with Pointerpro

Here's a quick introduction on how Pointerpro works, brought to you by one of our product Experts, Chris.

How to transform response data into automated, personalized reports ...





THIS IS WHAT CLIENTS SAY ABOUT US.

"I give the new report builder 5 stars for its easy of use. Anyone without coding experience can create personalized reports quickly."



Nicolas Gounin

CFO & COO at Egg Science



[Book a demo](#)

7. AI tool for personal branding of consultants and coaches: Taplio

I've said it before and I'll say it again: As a business leader today you're an asset to your own brand. That's especially true in consultancy, where your expertise and therefore your opinion on relevant subjects matter to people. No better place to engage with people at scale than on LinkedIn, of course.

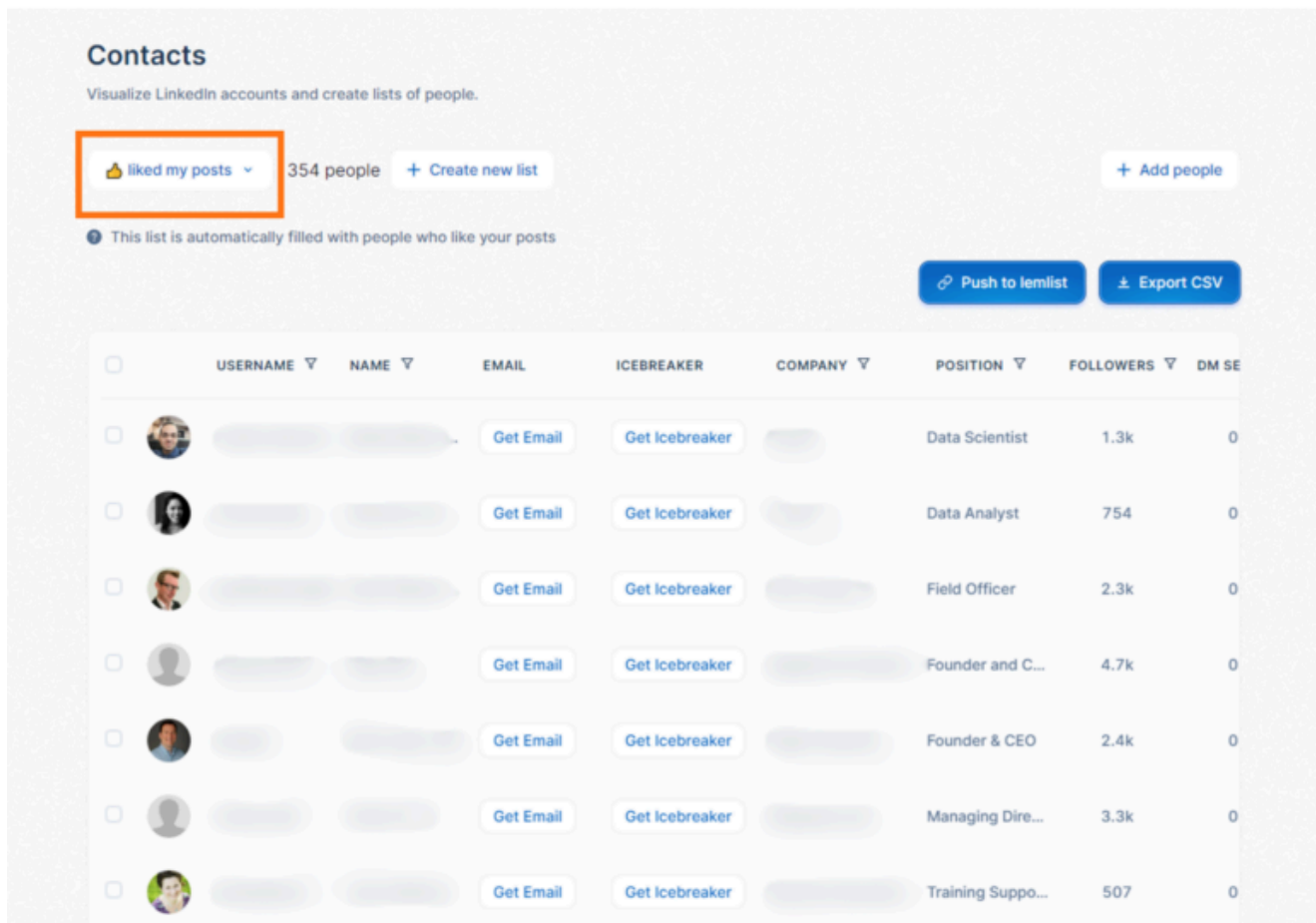
How to maintain your online engagement with potential customers thanks to AI

However, **it takes time not only to start a conversation, but also to keep it going.** In the past I've regretfully followed up too late on messages of interesting people and potential Pointerpro users. I wouldn't have with Taplio is a tool that helps you avoid exactly that. Its LinkedIn engagement Builder identifies unanswered comments and prepares relevant answers.



to really connect with someone.

It also lists the people that engage with you – whether they commented on your posts or just liked them. I haven't tried it yet, but there's also a connection to [Lemlist](#) and by exporting a .CSV or via Zapier you can also feed your CRM. So there's everything you need in place to nurture personal relationships.



Besides nurturing conversations you've started or gotten engaged in, it kind of speaks for itself that Taplio also offers features to create and schedule relevant posts. That includes a carousel generator, which I haven't been able to test yet though.

Rating

Ingenuity: ★

I'm not going to hand out a crazy amount of stars because the application of AI is fairly straightforward here. The tool keeps track of your network and uses a large language model to generate messages. But I do think the tool in general is very useful.



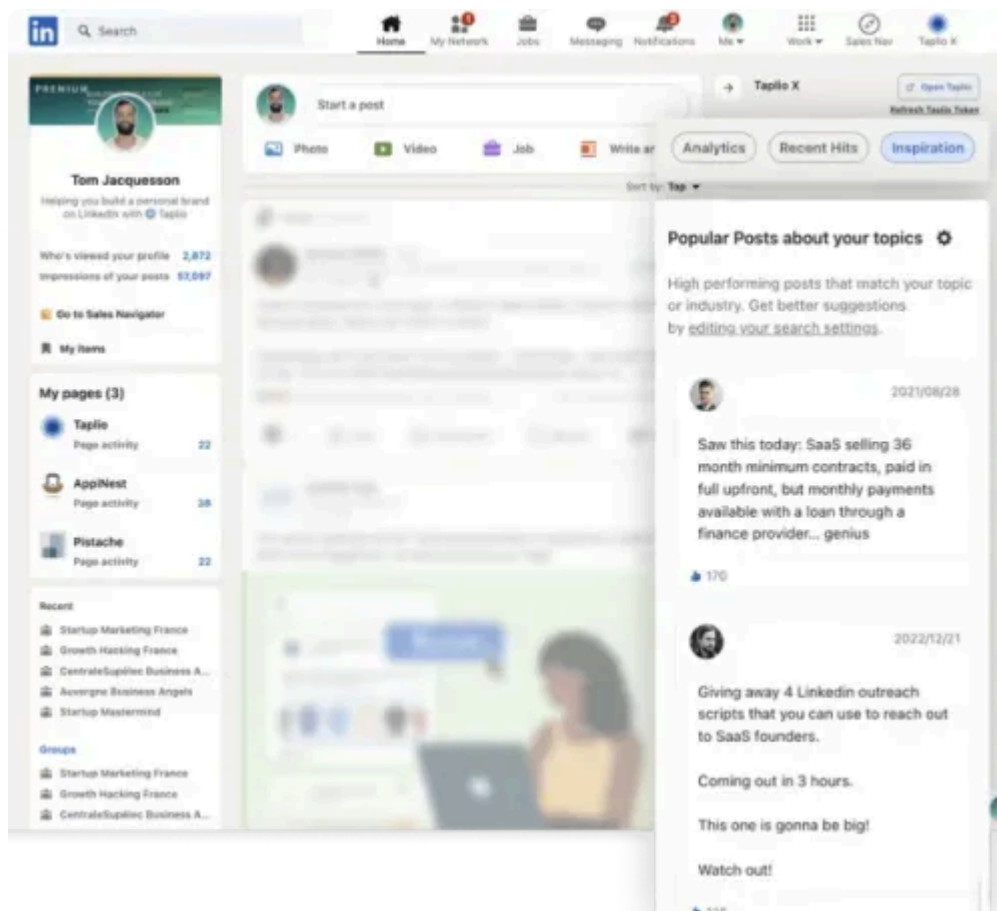
relevant post ideas. So the data it's based on is pretty relevant.

I haven't been exactly overwhelmed by the quality of the content suggestions, but I've definitely come across much worse – and mostly, I think Taplio does a good job of keeping you inspired as a user. That way it helps you overcome social media fatigue when it's so important to keep your engagement consistent. So, I happily rate this with two stars.

User experience: ★★☆☆

The tool is quite user friendly, and I think I like most is the **Chrome extension**. It helps to have reminders in the flow of daily work and LinkedIn usage to engage with people.

For instance, when I stumble on someone's profile, Taplio gives you a summary of that person's best content. This can help you decide whether engaging with them may help you build your own personal brand as a consultant.



Source



8. AI tool for consultants who do a lot of online research: Perplexity

Perplexity is what's called a **conversational search engine**. I have to say that I tend to use ChatGPT more and more as a type of search engine too. But it doesn't give you the exact sources on which it bases the answers it gives you.

Perplexity allows you to do research through Google very quickly. It searches huge numbers of web pages that it then summarizes for you. The nice thing is that **Perplexity does source identification**. That way you get a quick overview of information on a particular topic.

Do you find something interesting? Then you can easily click through to that web page to quickly learn more about that part. Here's an example of what would happen if you looked for the greatest hikes:



21 Best Hikes in the World - Adventures.com

adventures • 1

The 50 Best Hikes in the World - Much Better...

muchbetteradve... • 2

World's Best Hikes: Epic Trails - National...

nationalgeograp... • 3

View 2 more

Answer

Here are some of the world's greatest hikes:

The Tour du Mont Blanc, Europe

A classic 110-mile circuit around Mont Blanc, the highest peak in the Alps. It traverses parts of France, Italy and Switzerland, passing through charming villages and offering stunning views of glaciers and jagged peaks. The full circuit takes about 11 days to complete ¹.

The Appalachian Trail, USA

Extending 2,200 miles from Georgia to Maine, the Appalachian Trail is the longest hiking-only footpath in the world. It passes through 14 states and takes 5-7 months to hike end-to-end. The trail offers a diversity of landscapes, from the southern Appalachian forests to the rocky peaks of New England ² ³ ⁴.

The Laugavegur Trail, Iceland

This 55km trek in the Icelandic highlands showcases the country's volcanic landscapes, with black deserts, colorful rhyolite mountains, hot springs, and glaciers. It typically takes 3-4 days to complete the route from Landmannalaugar to Þórsmörk ¹ ⁵.

The Everest Base Camp Trek, Nepal

One of the most famous treks in the world, this 62-mile route takes you to the base camp of the world's highest mountain at 17,598 ft. Along the way, you'll pass through Sherpa villages, Buddhist monasteries, and have incredible views of the Himalayan giants like Everest, Lhotse and Ama Dablam ².

The Milford Track, New Zealand

Known as the "finest walk in the world", this 33.5-mile trail in Fiordland National Park takes hikers through lush rainforests, past waterfalls and alpine meadows, and along the shores of Lake Te Anau and Milford Sound. The full hike takes 4 days ² ⁵.

These are just a few of the world's most iconic and beautiful long-distance hiking trails. Each offers a unique experience, from challenging high-altitude treks to more leisurely multi-day walks through stunning landscapes. The best hike depends on your fitness level, available time, and sense of adventure.

Share

Rewrite

70+ Routes

View More

Search Videos

+

Generate Image

+

Not only that: It gives you the chance to dig deeper with further questions. In fact it even suggests possibly useful follow-up questions.



what are some hiking trails in the united states suitable for beginners	+
what are some hiking trails in south america suitable for beginners	+
what are some hiking trails in africa suitable for beginners	+
what are some popular hiking trails in europe	+
what are some hiking trails in asia	+

Why a consultant may use Perplexity rather than ChatGPT as an AI research tool

The strength of Perplexity is that it will never make up information as it relies on what can be found online. Bear in mind that any information found online can still be wrong, but at least Perplexity is not just playing a language game to come up with answers.

Many **modern consultants develop benchmark assessments and reports** to advise customers – and **combine it with research data** to inform their feedback. Simply Googling research data would be too slow, whereas ChatGPT doesn't assure accuracy (nor does it cite sources). Perplexity is the right in-between solution.

Rating

Ingenuity: ★ ★

I don't want to be overly enthusiastic, so I'll stick with two stars here. But frankly, I'm impressed with how the makers of this tool have identified and addressed an in-between (but very real) need of combining accuracy with speed-of-delivery.

If you're a consultant, this type of AI tool equips you really quickly with validated knowledge to inform your customers accurately about things they may have heard about but don't grasp entirely. Great added value for any consultant I'd say!

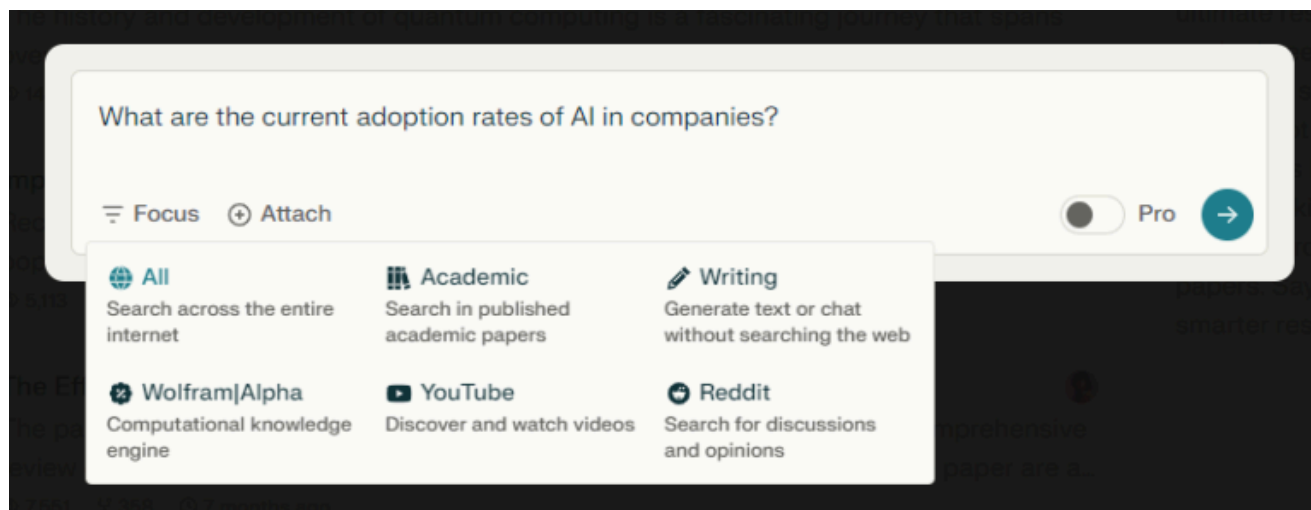
AI quality: ★ ★

Perplexity uses reliable online sources and the information it provides is well up-to-date. It's not as good as ChatGPT at addressing complex questions or providing creative output. But again, that's not what it's designed for. So I'll still give it two stars here.



One strong point of Perplexity is that it does take into account the nuances of your query.

That way you get a human-like conversation that then also gives you the opportunity to ask further questions. I also love that it you can ask it to **only use specific sources** – for instance only published academic papers.



9. AI tool for different types of consulting firms: Chatbase

Chatbase is a chatbot that answers questions based on your own data. On a website this makes it a tool that could answer certain questions to visitors based on your FAQ, for instance.

As a consulting firm, you generally won't have this need but you *can* use Chatbase to create a chatbot that's **trained on your own existing data, relevant market data online and the data you collect from respondents** – through meeting minutes, meeting transcripts or assessments for instance.

If you do this well and long enough, whenever you're looking for insights, you **won't have to browse through all your files** individually. All you'll have to do is ask.



The screenshot shows the Pointerpro interface. On the left is a sidebar with icons for 'Files', 'Text', 'Website' (highlighted with an orange box), 'Q&A', and 'Notion'. The main area is titled 'Website' and contains a 'Crawl' section with a text input field containing 'https://www.example.com' and a 'Fetch more links' button. Below this is a progress bar at 100% and a note: 'This will crawl all the links starting with the URL (not including files on the website)'. An 'OR' separator follows. The 'Submit Sitemap' section has a text input field with 'https://www.example.com/sitemap.xml' and a 'Load additional sitemap' button. Below is the 'Included Links' section, which has a 'Delete all' button and a '+' button. It lists several links with their character counts and a red trash icon for each:

Link	Count	Action
https://www.example.com/...	5439	Trash
https://www.example.com/...	1089	Trash
https://www.example.com/...	5975	Trash
https://www.example.com/...	14398	Trash
https://www.example.com/...	1021	Trash
https://www.example.com/...	12506	Trash
https://www.example.com/...	1707	Trash
https://www.example.com/...	6580	Trash
https://www.example.com/...	...	Trash

On the right, the 'Sources' section shows '26 Links (105,084 detected chars)' and 'Total detected characters 105,084 / 400,000 limit'. It includes a 'Create Chatbot' button.

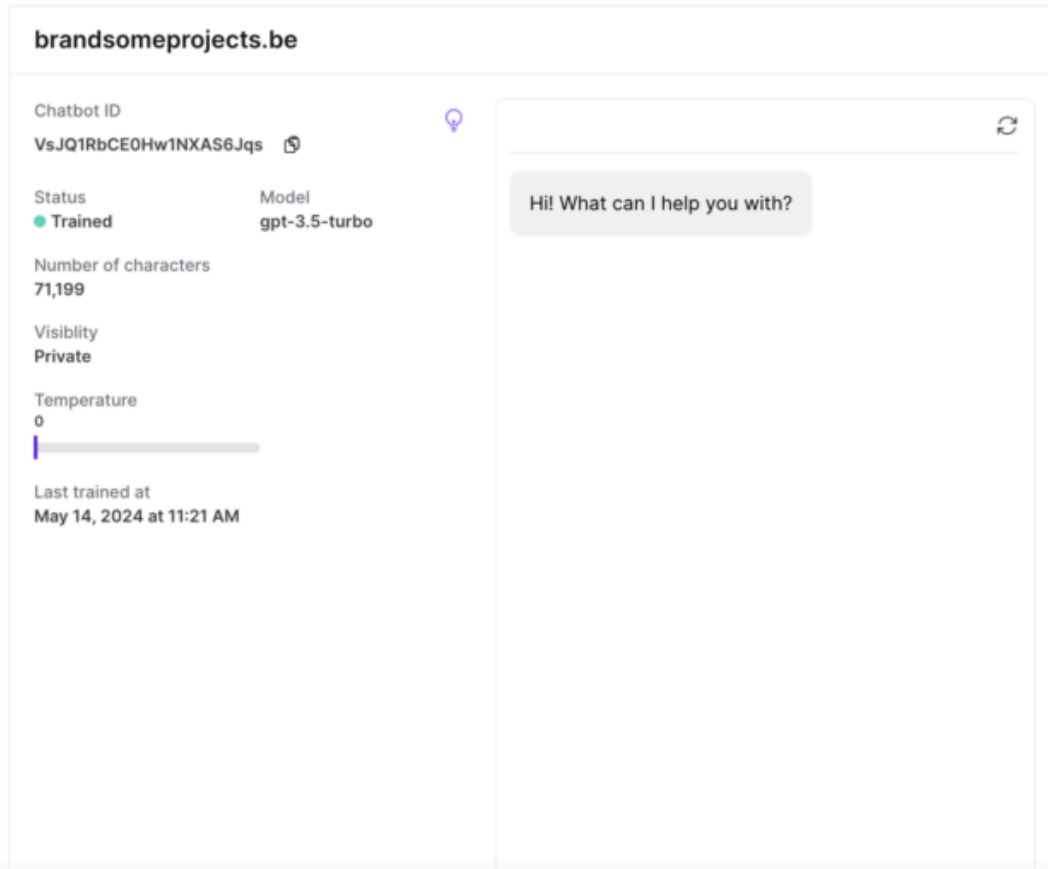
Rating

Ingenuity: ★★

Clearly, the use case I'm focusing on is not the main one for the creators of Chatbase. A chatbot in itself is probably the most obvious application of GenAI, so I can't attribute a super high score here. Nonetheless, Chatbase can be a fantastic tool to create a competitive advantage for yourself as a consultant. So, I'll grant two stars.

AI quality: ★★★

This will mostly depend on the sources you provide it with to train itself. So the sky is the limit. I really like the idea of being able to leverage your own knowledge and data. It's crucial for any consultancy firm to differentiate themselves. Let me be generous and give three stars here.



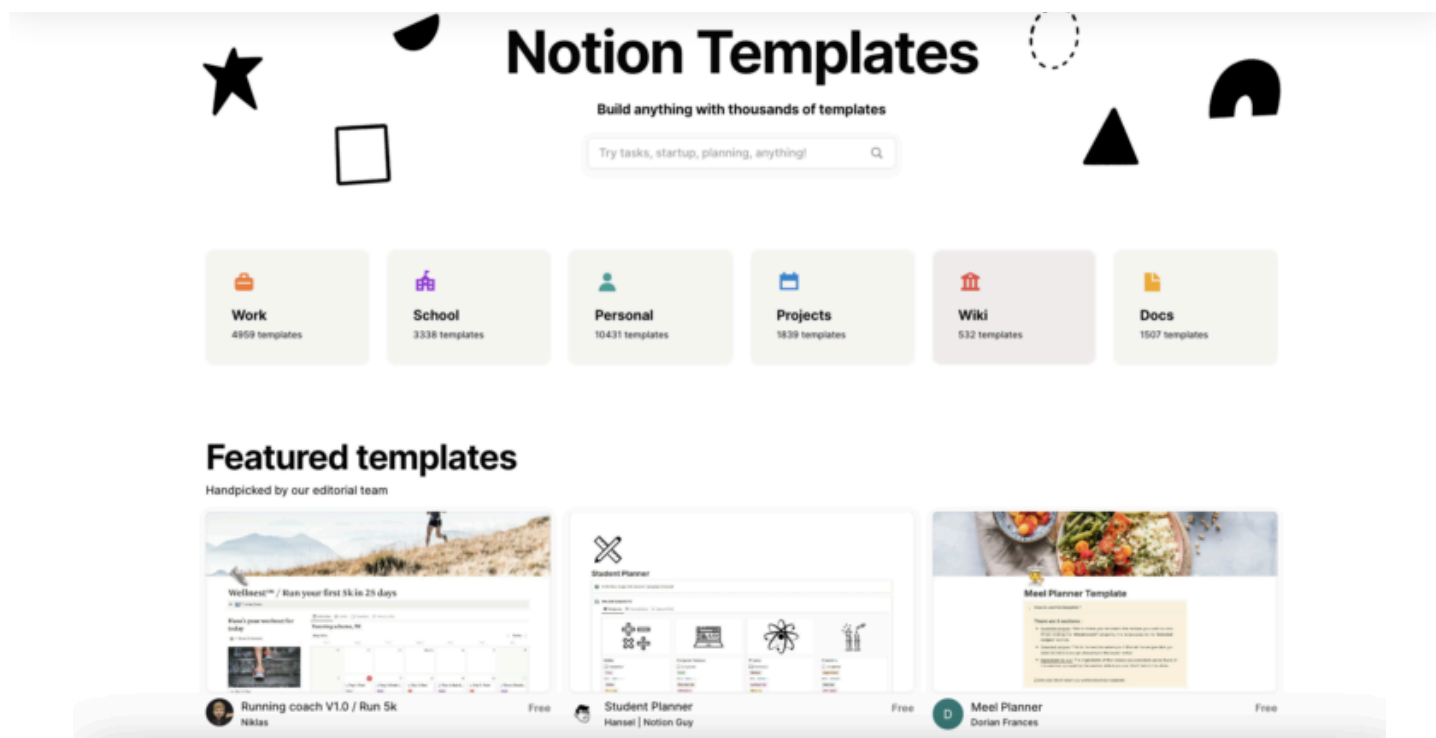
User experience: ★ ★

Brandsome explained to me that training the chatbot certainly does not require you to be digitally proficient. The tool shows very clearly what you need to do.

Businesses that want to integrate the chatbot on their website will undoubtedly have to fiddle with a few other tools, but for the specific **"consultancy knowledge database"-use case** here, it does seem like things are easy to set up.

10. AI tool for consultant productivity: Notion AI

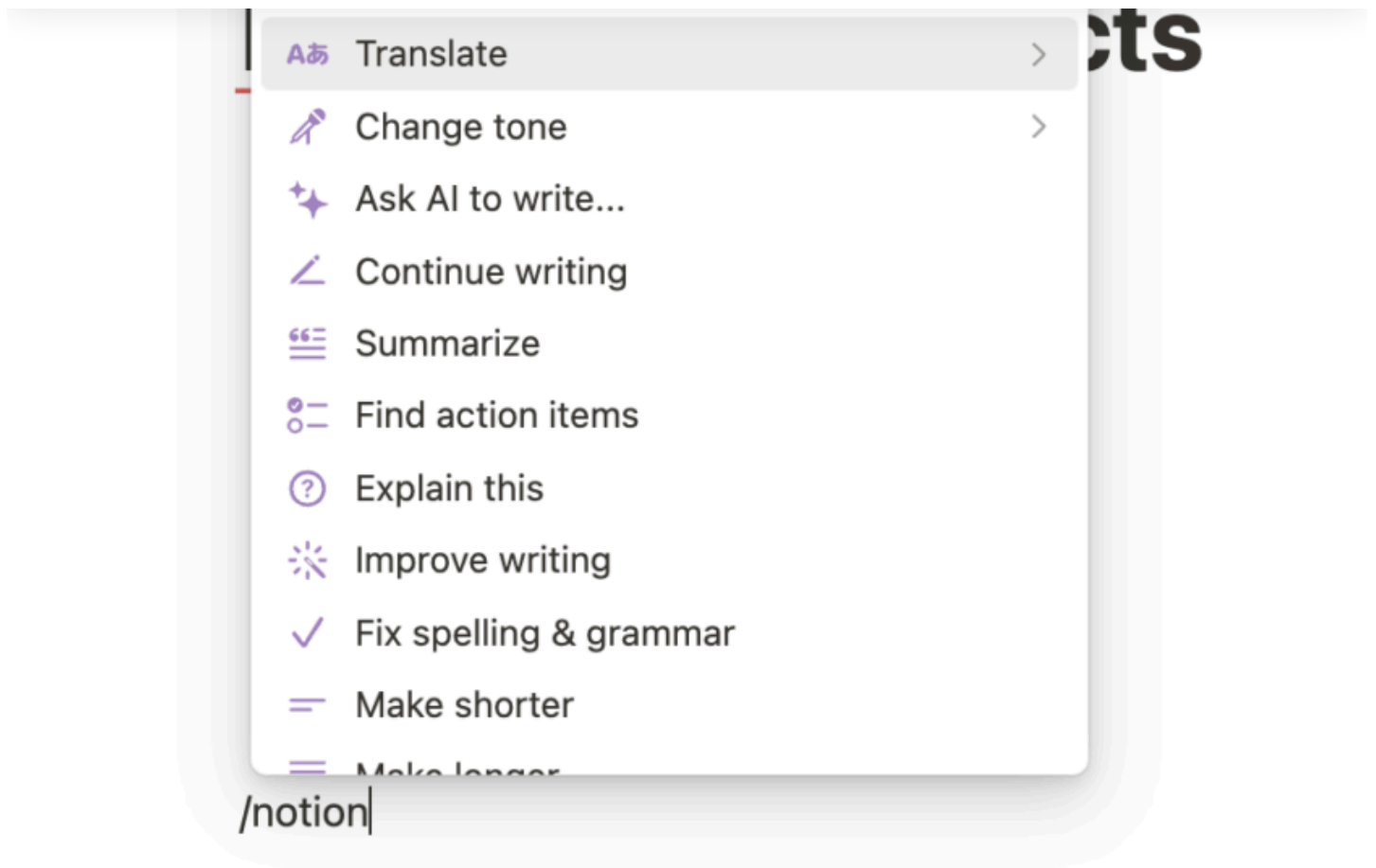
Some of you may already know Notion as the tool in which all of a business' projects are bundled. It helps you plan, write, brainstorm and organize your thoughts and ideas for yourself or for your team – thanks to thousands and thousands of templates. In other words, a great **project management** tool to have in a consultancy.



Notion now also has an AI component. It helps you improve your workflows and save time. A good way to describe it is like a virtual assistant. Here's how it works

A day-to-day AI assistant for consultants

In essence, Notion is one big compilation of template sheets that you elaborate on for your specific project or situation. Now the AI assistant helps you elaborate faster and better. Simply type `/notion` and you'll get a list of ways the AI can assist you.



In the context of a project – based on a bunch of back-to-back meeting minutes (or transcripts), for instance – it can prepare to-do-lists, lay out schedules or prepare the agenda for a follow-meeting. In other words, **it makes sure nothing slips through the cracks.**

Rating

Ingenuity: ★

The AI assistant is an improvement on a tool that's already great. And that's the way forward for all SaaS tools in the next few years, for sure. So well done, Notion. However, I don't want to overstate the ingenuity here. It's no revolution but a logical – well executed – integration of large language model capabilities.

AI quality: ★★

From what I understand, Notion AI is powered by GPT-3.5 and GPT-4. Based on my experience, it definitely seems to generate the same level of quality output, which is really great.

User experience: ★★★



have to do is type the magic word: /notion

The integration of ChatGPT-like capabilities ensures that everyone in your consultancy firm reaches a common baseline in AI adoption.

Conclusion: just try it

We're only at the dawn of accessible AI. I encourage anyone in the professional services business not to shy away from it. See what it could do for you and use the opportunity to (re)discover what skills and know-how make you unique. In a [study](#) that Pointerpro conducted with iVOX, almost 40% of respondents indicated that they see digitalization as a threat to their employment.

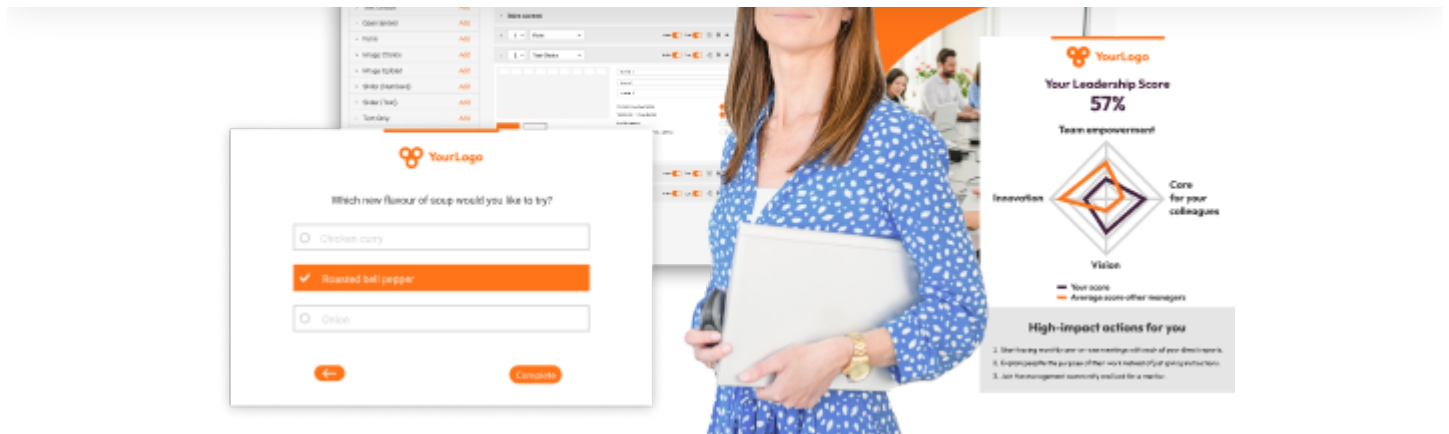
I urge you not to see it that way. To paraphrase a recent Consulting Success [blog article](#): AI or digital technology isn't about to replace consultants. But consultants who learn to leverage it will replace the ones who don't.

Want to leverage your own unique know-how beyond the collective know-how of AI for your consulting business? I can only urge you to [discover our Pointerpro assessment and report software](#).

Thanks for reading!

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for free!

Get started today



About the author:



Stefan Debois

Stefan is an engineer at heart, a consultant in spirit and a CEO in action. After 15 years in Enterprise Software consulting at IBM and CSC, he founded Pointerpro to empower professional service providers with an assessment platform to scale their expertise and business.

Recommended Reading



How to be a consultant today: Surf on the digital evolution of consultancy in 5 phases

How to be a consultant today? There's really one key guideline: Use digitalization...

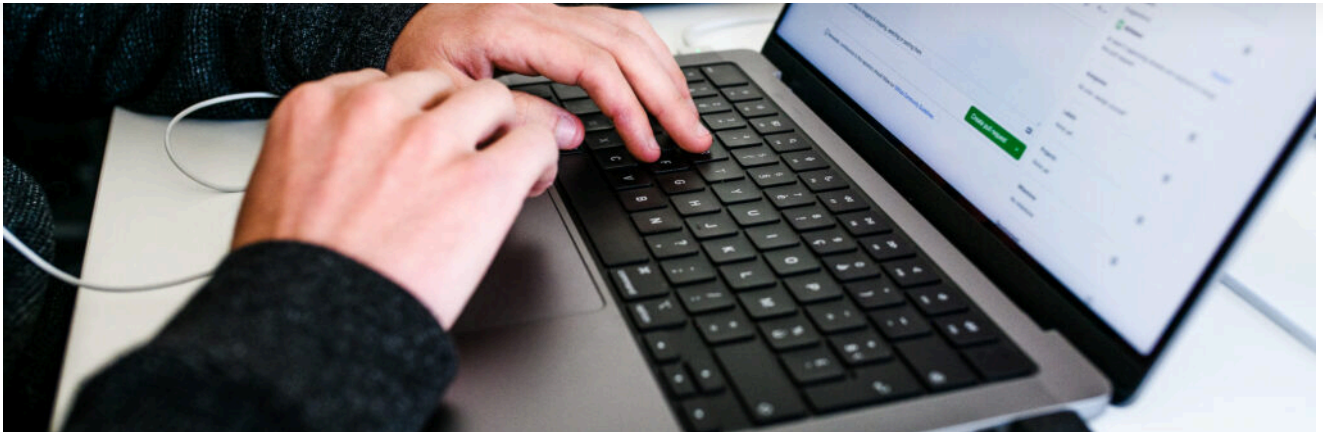
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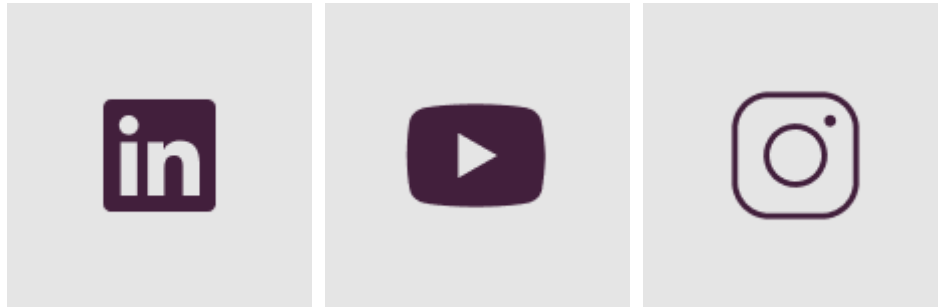
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