



# ICBC

INSTITUTE OF CERTIFIED  
BUSINESS CONSULTANTS, NIGERIA.®

## AI Tools for Business Consultants & Their Use Cases

AI Tool	Category	Key Tasks You Can Complete	Best Use Case in Consulting
ChatGPT	General AI / Strategy	Proposal writing, business plans, SOP creation, client reports, brainstorming, and training materials	Strategy development, documentation, ideation
Microsoft Copilot	Productivity AI	Excel analysis, PowerPoint generation, meeting summaries, document drafting	Corporate consulting, reporting, presentations
Notion AI	Knowledge Management	Meeting notes, project tracking, internal wikis, task planning	Process documentation, team collaboration
Jasper AI	Marketing AI	Ad copy, email campaigns, landing pages, brand messaging	Marketing consulting, campaign strategy
Copy.ai	Marketing AI	Sales copy, product descriptions, outreach messages	Sales funnel optimization
Grammarly	Writing Enhancement	Editing, tone improvement, and professional communication	Client communication, report polishing

Canva	Design AI	Presentations, social media graphics, proposals, brand kits	Visual communication, client presentations
Midjourney	Creative AI	Concept visuals, branding ideas, marketing creatives	Brand consulting, campaign visuals
DALL·E	Creative AI	Custom illustrations, product mockups, and visual storytelling	Proposal enhancement, storytelling
Tableau	Data Analytics	Dashboards, KPI tracking, business insights	Data-driven consulting, reporting
Power BI	Data Analytics	Data modelling, interactive reports, forecasting	Performance tracking, financial analysis
Google Analytics	Analytics	Website traffic analysis, customer behaviour insights	Digital strategy consulting
HubSpot	CRM / Sales	Lead tracking, automation, email marketing, and pipeline management	Sales process consulting
Salesforce	CRM / Enterprise	Customer lifecycle management, forecasting, and reporting	Enterprise consulting, CRM implementation
Zapier	Automation	Workflow automation, tool integration, task automation	Process optimization
Make (formerly Integromat)	Automation	Advanced integrations, workflow automation	System design, automation consulting
Trello	Project Management	Task tracking, workflow organization	Project execution, team coordination
Asana	Project Management	Project planning, team collaboration, deadlines	Implementation consulting
ClickUp	Project Management	Task management, dashboards, documentation	End-to-end project tracking

Otter.ai	Meeting AI	Transcription, summaries, action items	Client meetings, documentation
Fireflies.ai	Meeting AI	Call recording, insights extraction, and notes	Stakeholder meetings
Surfer SEO	SEO AI	Keyword research, content optimisation	Digital marketing consulting
SEMrush	SEO / Analytics	Competitor analysis, keyword tracking, and audits	Market research
QuickBooks	Finance AI	Financial tracking, reporting, and invoicing	Financial consulting
Xero	Finance AI	Bookkeeping, reporting, reconciliation	SME financial advisory

## How to Use This as a Consultant

Instead of trying to use everything, focus on **task-based stacking**:

- **Strategy & Reports:** ChatGPT + Power BI
- **Marketing Consulting:** Jasper + Canva + SEMrush
- **Operations Optimisation:** Notion AI + Zapier
- **Client Delivery:** Copilot + Tableau + Grammarly

# AI-Powered Consultant Workflow (Step-by-Step)

## PHASE 1: CLIENT DISCOVERY & PROBLEM DEFINITION

**Goal:** Understand the client's business, challenges, and objectives.

**Steps:**

1. Conduct client interviews and discovery sessions
  - Use Otter.ai or Fireflies.ai to record and transcribe discussions
2. Summarise insights and extract key issues
  - Use ChatGPT to turn raw notes into:
    - Problem statements
    - Business objectives
    - Key pain points
3. Organize findings
  - Store insights in Notion AI for structured documentation

## PHASE 2: RESEARCH & ANALYSIS

**Goal:** Back your recommendations with data and insights.

**Steps:**

1. Conduct market and competitor research
  - Use SEMrush for competitor and keyword insights
  - Use Google Analytics (if available) for client data

2. Analyse business performance
  - Use Power BI or Tableau to build dashboards
3. Generate insights and hypotheses
  - Use ChatGPT to:
    - Identify trends
    - Highlight opportunities
    - Suggest strategic directions

## PHASE 3: STRATEGY DEVELOPMENT

**Goal:** Create actionable solutions.

**Steps:**

1. Develop strategic options
  - Use ChatGPT for:
    - Business models
    - Go-to-market strategies
    - Growth plans
2. Build implementation frameworks
  - Document processes in Notion AI
3. Create financial and operational projections
  - Use Microsoft Copilot in Excel

## PHASE 4: SOLUTION DESIGN & PRESENTATION

**Goal:** Package your ideas professionally.

**Steps:**

1. Create consulting decks and reports
  - Use Microsoft Copilot (PowerPoint)
  - Design visuals with Canva
2. Refine messaging and clarity
  - Use Grammarly
3. Generate visuals (optional)
  - Use DALL·E or Midjourney

## PHASE 5: CLIENT PRESENTATION & BUY-IN

**Goal:** Get approval and alignment.

**Steps:**

1. Present recommendations clearly
2. Capture feedback and objections
  - Record with Otter.ai
3. Refine strategy
  - Use ChatGPT to adjust based on feedback

## PHASE 6: IMPLEMENTATION & EXECUTION

**Goal:** Turn strategy into results.

**Steps:**

1. Set up project plans
  - Use Asana, Trello, or ClickUp
2. Automate workflows
  - Use Zapier or Make (formerly Integromat)
3. Optimise marketing & sales processes
  - Use HubSpot or Salesforce

## PHASE 7: MONITORING & OPTIMIZATION

**Goal:** Ensure continuous improvement.

**Steps:**

1. Track KPIs and performance
  - Use Power BI or Tableau
2. Generate reports and insights
  - Use ChatGPT for monthly summaries
3. Recommend improvements
  - Continuous analysis + AI-driven insights

## PHASE 8: CLIENT REPORTING & RETENTION

**Goal:** Maintain long-term value.

**Steps:**

1. Create periodic reports
  - Use Microsoft Copilot
2. Communicate results professionally
  - Polish with Grammarly
3. Identify upsell opportunities
  - Use ChatGPT to suggest new services

### Simple Workflow Summary

**Discover → Analyze → Strategize → Present → Implement → Monitor → Improve**

### Pro Tip (What Actually Makes This Work)

The tools don't make you a great consultant—the **workflow does**.

If you:

- Ask better questions
- Structure problems clearly
- Use AI to speed up thinking (not replace it)

...you'll deliver **premium consulting value**.

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