
AI for Professional-Services Firms

A practical, repeatable program for firms whose product is their judgement — AI in client work with confidentiality and quality as the constraint.

WHO IT'S FOR

Consulting, advisory and accounting firms — partners and client-facing teams.

FORMAT

In-house workshop

LENGTH

Half-day

What your team walks away with

Put AI into client work where it sharpens the work, while protecting client confidentiality and the quality your reputation rests on.

Curriculum

- 01 Where AI helps engagement work — research, drafting, analysis, review
- 02 Client confidentiality: what never enters an AI tool
- 03 Accuracy and quality: checking AI work you put your name to
- 04 Disclosure: when and how to tell clients you used AI
- 05 Building repeatable, safe AI workflows across the firm
- 06 A firm-wide AI usage policy and confidentiality guardrails

You keep

An AI usage policy and client-confidentiality guardrails for engagement work.

