



AI for professional and PRO services

Turning specialist knowledge into faster, more
consistent client delivery.

WORKS WITH THE ASSISTANTS TEAMS ALREADY USE



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AT A GLANCE

Turning specialist knowledge into faster, more consistent client delivery.

Professional services firms sell judgment, and judgment depends on knowledge that is usually trapped in people's heads, old matters and scattered folders. AI can speed up case intake, knowledge retrieval, document preparation and client communication, but the firm's reputation rests on the accuracy and confidentiality of what it delivers. This playbook explains where AI fits in advisory, accounting, legal-adjacent, consulting, engineering and similar practices, how to protect client confidentiality and quality, how to measure leverage and realization, and how to move from experiments to a repeatable way of working.

WHO IT IS FOR

Managing partners, practice leaders, operations and knowledge managers, and senior practitioners at accounting, consulting, advisory, engineering, architecture, recruitment and other professional services firms.

TIME TO USE

60 minutes to read; one working session to apply

What you will have at the end

- A map of which engagement tasks suit AI assistance and which need a professional alone
- Clear confidentiality and review rules that partners and staff can follow
- A knowledge base plan that turns past work into a reusable asset
- A pilot design with metrics tied to utilization, turnaround and quality

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EXECUTIVE BRIEF

What AI changes in a knowledge business

01



The product is expert judgment. AI changes how fast the raw material gets assembled, not who is accountable for the advice.

A professional services firm earns revenue from time, expertise and trust. A large share of practitioner time goes to work that is necessary but not the best use of expertise: gathering facts at intake, finding the last similar piece of work, assembling a first draft, reformatting, writing the status email. AI is well suited to compressing that layer. A senior person who gets a good first draft in minutes can spend the saved time on the judgment the client is paying for.

The same technology creates real exposure. Client information is confidential, often privileged or regulated. Advice must be correct for the client's facts. A fluent but wrong paragraph in a client deliverable can cause harm and damage the firm. For that reason the firm needs a position: what tools are approved, what data may enter them, who reviews what, and how the firm tells clients about its use of AI where appropriate.

- Use AI to prepare, retrieve and draft. Keep professionals accountable for advice and sign-off.
- Treat client confidentiality as the first design constraint, not an afterthought.
- Invest in your knowledge base: past work, templates and precedents are your most reusable asset.
- Measure leverage, turnaround, realization and quality together, never speed alone.
- Decide your pricing and engagement-letter position before clients ask.



PROFESSIONAL OBLIGATIONS

Many professions have codes of conduct, duties of competence and confidentiality, and regulator guidance on technology. Check the current rules and guidance of your professional bodies. This playbook is not legal or professional advice.



WORKING QUESTION

If a client asked tomorrow whether you use AI on their work, could every partner give the same honest answer?

WHERE IT FITS

Where AI fits in the engagement lifecycle

02

Walk the lifecycle from first contact to closure and mark where preparation ends and judgment begins.

STAGE	AI CAN HELP WITH	PROFESSIONAL MUST OWN
Case intake	Structuring enquiry details, drafting follow-up questions, conflict and scope checklists	Acceptance decision, conflict clearance, scope and fee
Research and knowledge retrieval	Finding similar past matters, precedents, internal guidance and templates	Judging relevance and currency; confirming primary sources
Analysis	Summarizing long documents, extracting key terms, building comparison tables	Interpretation, conclusions and risk calls
Document preparation	First drafts of reports, letters, proposals, workpapers and meeting notes	Final content, tone, accuracy and sign-off
Client communication	Draft updates, plain-language explanations, follow-up reminders	What is said, when and to whom
Closure and learning	Matter summaries, lessons learned, tagging for the knowledge base	Deciding what is reusable and what must stay confidential

Three patterns recur across practice types. First, intake and administration benefit quickly because the work is structured and the stakes are lower. Second, knowledge retrieval is the highest-value use for most firms, because people spend an astonishing amount of time asking

colleagues where something is. Third, drafting is valuable when the firm has strong templates and examples, and risky when it does not.

Consider a small accounting or advisory practice receiving twenty new enquiries a month. Each currently triggers a call, a scattering of emails and a hand-built proposal. A structured intake form, a tool that turns the answers into a clean summary with open questions, and a proposal template filled from approved wording can cut the administrative effort per enquiry while the partner still decides whether to accept the work and at what fee. The partner's time moves to the conversation with the client. Apply the same thinking to each practice: separate the assembly from the judgment, automate or assist the assembly, and protect the judgment.

Poor fits

- Giving final advice to a client without professional review
- Citing authorities, standards or figures the tool produced without checking the primary source
- Work involving highly sensitive matters when no approved, protected tool is available
- Tasks where the firm cannot explain or defend how a conclusion was reached

COMMON MISTAKE

Letting individuals pick their own consumer tools. Staff with good intentions paste client documents into public tools, and the firm learns about it after the fact.

WORKING QUESTION

Which stage of your engagement lifecycle burns the most senior time on work a well-briefed associate could do from a good draft?

HOW IT WORKS

How the tools work and how they fail

03

A professional who understands the failure modes can use these tools safely and spot errors quickly.

A language model generates text that is statistically likely given its instructions and any material shown to it. It is not a database of verified facts and it does not check its own claims. When the answer is in front of it, in a document you provided, it summarizes and extracts well. When the answer is not, it may produce a plausible invention. Citations, quotes, case references and figures are classic places for invention.

01 Ground it in your content

Connect the tool to approved sources such as your templates, past deliverables and policies, so answers come from material you trust.

02 Instruct it precisely

State the role, audience, format, jurisdiction or standard, and what to do if sources do not answer the question.

03 Demand evidence

Require references to the source passage. Treat any unsourced fact as unverified.

04 Review as you would a junior's work

A competent reviewer checks facts, logic and fit to the client. The more novel or consequential the point, the closer the check.

Typical failures

- Invented references, quotes or figures
- Plausible but generic advice that ignores client specifics
- Mixing facts from different clients if the system has loose boundaries
- Out-of-date guidance presented as current
- Overconfident tone that hides uncertainty
- Subtle changes in meaning when summarizing a long document

DESIGN RESPONSE

Keep client matters in separate workspaces, ground the tool in vetted sources, and require named reviewers to verify every external citation against the primary source.



WORKING QUESTION

What is your firm's rule for verifying a citation or figure that an AI tool supplied?

OPERATING MODEL

Roles, ownership and the knowledge engine

04



Leverage comes from a managed knowledge base and clear accountability, not from licenses handed to everyone.



ROLE	OWNS	TYPICAL PERSON
Managing partner or sponsor	Policy, risk appetite, investment, client position	Managing partner or COO
Practice lead	Which use cases to adopt, quality standards for the practice	Senior partner or director
Knowledge manager	Curating templates, precedents and past work; tagging; retiring stale content	Knowledge or practice support lead
Risk and confidentiality lead	Approved tools, data rules, incident handling, client terms	General counsel, risk partner or compliance
Engagement lead	Review and sign-off on each deliverable	Partner or manager on the matter



ROLE	OWNS	TYPICAL PERSON
Champions	Peer coaching, collecting examples that worked and failed	Respected seniors and associates

The knowledge engine is the differentiator. Most firms hold years of excellent work in matter folders that nobody can search. Selecting the best examples, removing client identifiers where required, and tagging them by issue, sector and outcome produces a library that both people and tools can use. This takes a person, not a weekend. Assign a knowledge manager with authority to retire outdated material, and agree how partners nominate their best work.

Build the knowledge base

- Select the 50 to 100 best deliverables and templates by practice
- Remove or mask client identifiers where confidentiality requires it
- Tag by service line, sector, issue and date
- Record who owns each item and when it was last reviewed
- Mark superseded items so they are not retrieved
- Check client contracts for limits on reuse of work product

Also agree how juniors learn. If associates never produce a first draft themselves, they may not develop judgment. Some firms have juniors draft first and then compare with the tool's version; others set unaided exercises. Decide deliberately, because the apprenticeship model is part of what clients are buying.

WORKING QUESTION

Who in your firm could today name the best past example of your most common deliverable, and could a colleague find it?

RISKS AND CONTROLS

Confidentiality, quality and professional accountability

05

Clients trust firms with sensitive information. Controls must be specific enough that staff can follow them under deadline.

RISK	CONTROL	OWNER
Client data entered into unapproved tools	Approved tool list, blocked consumer tools where feasible, plain-language rule with examples	Risk lead
Cross-client leakage	Separate workspaces per client or knowledge manager matter; access follows the engagement team	Knowledge manager
Wrong or invented content reaches the client	Named reviewer; verify citations and figures against primary sources	Engagement lead
Breach of client contract or sector rules	Check engagement terms; get consent where required	Risk lead
Over-reliance and loss of skill	Training, unaided exercises, review of juniors' reasoning	Practice lead
Unclear billing and value	Decide pricing approach and disclose where appropriate	Managing partner

Document a short policy staff can remember. It should say which tools are approved, what categories of information may never be entered, who reviews AI-assisted work, and what to do if something goes wrong. Add a fast incident route: if someone pastes the wrong document into the wrong tool, they should report it the same day without fear of blame, because a quick report allows quick containment.

Engagement letters and client disclosures are evolving. Some clients, particularly in regulated sectors, now ask about AI use in their procurement questionnaires. Prepare a clear, honest statement of how you use AI, the safeguards you apply and where a human reviews. Do not overstate what the tool does or understate your use of it. Check current professional guidance and your regulators' expectations on disclosure and supervision.

ACCOUNTABILITY STAYS HUMAN

Using AI does not transfer responsibility. The signing professional answers for the work, so reviewers must have the time and expertise to review properly.

WORKING QUESTION

What would a staff member do today if they realized they had pasted client data into the wrong tool, and would they feel safe saying so?

MEASURING VALUE

Measuring leverage, quality and client outcomes

06

Time saved is not value unless it becomes capacity, margin or quality that clients notice.

Start with the economics of your firm. If you bill by the hour, faster drafting may reduce billable time and revenue unless you redeploy the hours or change the pricing model. If you price by project or subscription, faster delivery improves margin. Be clear which applies before you set targets, and discuss with partners openly, because incentives shape adoption.

METRIC	HOW TO MEASURE	CAUTION
Turnaround time	Days from instruction to first draft and to final, by deliverable type	Compare similar matters
Review cycles	Number of partner revisions before sign-off	Fewer cycles with higher defects is not a win
Defect rate	Errors found by reviewers or clients, logged by type	Count near-misses caught in review

METRIC	HOW TO MEASURE	CAUTION
Utilization and realization	Billable share of time; share of time billed that is collected	Watch for write-offs from rework
Knowledge reuse	Share of new work starting from a vetted precedent	Needs tagging discipline
Client feedback	Short post-engagement survey or responsiveness and clarity	Small samples; read comments
Staff experience	Pulse check on time spent on low-value tasks	Stable or improving

Run a controlled comparison

01 Pick a deliverable

Choose a repeatable output such as a proposal, a standard report section or a client briefing note.

02 Baseline

Time ten recent examples and record review cycles and defects.

03 Pilot

Have a small group produce the next ten with AI assistance, with the same reviewers.

04 Compare

Compare time, review cycles and defects. Ask reviewers for blind quality ratings where possible.

ILLUSTRATIVE ARITHMETIC

If a manager drafts a standard report section in 4 hours and a good first draft cuts that to 2.5 hours, but partner review rises by 30 minutes, the net saving is about an hour. Use your own figures and include review time.

Share results with partners in plain terms: what was measured, what changed, what went wrong and what you propose next. Partners adopt tools when they see evidence from colleagues they respect, in work they recognize. Keep the log of errors visible, because it builds credibility and shows that review is working rather than ceremonial.

 WORKING QUESTION

Do your incentives reward partners for adopting tools that reduce billable hours, and if not, what will happen?

IMPLEMENTATION

 Implementation guide for a practice

07

Start with one practice and one deliverable, and build the knowledge base as you go.

 01 Set policy first

Approve tools, define data rules and name the risk lead. Publish a one-page policy and brief everyone.

 02 Choose two use cases

One administrative, such as intake or meeting notes, and one knowledge-based, such as precedent retrieval or first-draft reports.

 03 Prepare the content

Curate the best past work and templates for the chosen practice. Mask identifiers where needed and tag the items.

 04 Pilot with a volunteer team

Four to eight weeks, named reviewers, a log of errors and wins, and a weekly check-in.

 05 Review and decide

Compare with baseline, review incidents and partner feedback, and decide whether to scale, change or stop.

 06 Embed

Update templates, onboarding, engagement letters and quality procedures to reflect how work is now done.

Ready to pilot

- Approved tool list and data rules are published
- Risk lead and engagement reviewers are named
- Curated content exists for the pilot practice
- Baseline for the chosen deliverable is captured
- Client terms are checked for any limits on AI use
- Pricing approach for the pilot is understood by partners

Training should be practical and specific to each practice. Show associates how to brief the tool with client context, how to ask for sources, and how to challenge an answer. Show partners how to review AI-assisted work efficiently: check the argument structure first, then verify high-risk facts, then style. Share real examples, including mistakes the team caught, so people learn what good review looks like.

WORKING QUESTION

Which practice has a strong template library, an enthusiastic lead and a deliverable that recurs weekly?

PITFALLS

Pitfalls and an illustrative scenario

08

The failures that hurt professional firms are rarely technical. They are about trust, incentives and discipline.

- Allowing shadow use of public tools before approving a safe alternative.
- Skipping verification of citations or figures because the draft reads well.
- Leaving the knowledge base uncurated, so retrieval returns outdated or weak examples.
- Measuring hours saved without addressing how the firm earns revenue.
- Overpromising to clients about what the tool does.
- Neglecting junior development.

- Launching firm-wide before one practice has proven the approach.

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ILLUSTRATIVE SCENARIO (HYPOTHETICAL)

A small advisory firm uses an assistant to draft a market overview for a client. The draft cites a report that the reviewer cannot find. The firm's rule requires verifying every external source, so the reference is removed before delivery. The firm adds a standing check and a line in its policy. The rule, not the tool, prevented the harm.

Another trap is uniform output. If every proposal comes from the same assistant with the same prompts, firms risk sounding alike and losing the distinct voice and point of view that clients hired them for. Use the tool for structure and speed, then put the firm's real insight, local knowledge and examples into the work.



Lastly, beware the quiet quality slide. Review time is the first thing squeezed under deadline pressure. Protect it by tracking review cycles and defects, and by making clear to staff that speed never excuses skipping verification.

WORKING QUESTION

Where in your current process would a polished but wrong draft most likely slip through?



BUYING AND VENDORS

Buying questions for tools and platforms

09

Professional services buyers should test confidentiality and grounding first, features second.



TOPIC	ASK	WHY IT MATTERS
Confidentiality	Is our data used to train models?Core client obligation Who can access it? Where is it stored and for how long?	

TOPIC	ASK	WHY IT MATTERS
Workspace separation	Can we separate clients and matters with access controls?	Prevents cross-client leakage
Grounding and citations	Does it cite the source passage for each answer?	Makes verification quick
Integration	Does it connect to our document management and practice systems?	Adoption and permissions
Auditability	Can we see prompts, outputs and users?	Supervision and incident response
Contract terms	What are the liability, breach notification and exit terms?	Protects the firm and clients

Run a bake-off on a real but low-risk task, using your own documents and your reviewers. Score accuracy, usefulness and how well each tool admits what it does not know. Involve your risk lead from the beginning, not at contract stage. If a vendor cannot answer data handling questions precisely, treat that as a finding.

Before you sign

- The risk lead has reviewed data handling and contract terms
- The tool was scored on your documents by your reviewers
- Pricing is clear at pilot and at full scale
- A client-facing statement on AI use is drafted
- You can export your content and settings if you leave

WORKING QUESTION

Which question about data handling would a vendor struggle to answer, and what does that tell you?

30 / 60 / 90

A first quarter that produces evidence

10

Use 90 days to set policy, prove one deliverable in one practice and start building the knowledge base.

First 30 days: ground it

- Publish a one-page policy: approved tools, forbidden data, reviewers and incident route
- Select one practice and two use cases, one administrative and one knowledge-based
- Capture a baseline for a repeatable deliverable
- Begin curating the best templates and past work, with identifiers masked where required

Days 31 to 60: test it

- Run the pilot with named reviewers, an error log and a weekly check-in
- Verify all external citations and figures as a standing rule
- Brief partners on pricing and incentive implications
- Train the pilot team on briefing, sourcing and review

Days 61 to 90: decide

- Compare turnaround, review cycles and defects with baseline
- Collect client and staff feedback and review any incidents
- Decide to scale, change or stop, and record why
- Update engagement letters, onboarding and quality procedures to reflect the new way of working

GLOSSARY

Terms used in this publication

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TERM	MEANING
Intake	The first stage of an engagement, where the firm collects facts, checks conflicts and agrees scope.
Knowledge base	A curated, searchable collection of past work, templates and guidance.
Precedent	A prior piece of work used as a model for new work.
Utilization	The share of available time spent on billable work.
Realization	The share of billed time that is actually collected.
Leverage	The ratio of junior to senior staff on work, or the ability to deliver more with the same senior time.
Engagement letter	The agreement that sets scope, fees and responsibilities for client work.
Grounding	Tying a tool's answers to specific, trusted source material.
Hallucination	A confident statement from a model that is not supported by any source.
Workpaper	A record of the work performed and evidence gathered in an engagement.
Conflict check	A review to confirm the firm can act without a conflicting interest.
Human in the loop	A named professional reviews and approves output before it reaches the client.

A note on use

This playbook is general guidance. It is not legal, accounting or professional advice. Check current professional rules, regulator guidance and your client contracts.



TAKE THE NEXT STEP

Take the free Halden assessment at halden.company/assessments, or talk to us at halden.company/contact about turning this into a plan for your organization.

