

FIELD GUIDE

The AI Consultant Playbook

Your Field Guide to Building a Thriving AI Transformation
Practice — From Training Provider to Strategic Advisor

AUTHOR

Rashid Smith

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How to Use This Playbook

This is not a reference manual to sit on a shelf. It is a field guide — meant to be marked up, dog-eared, and carried into every client conversation. It is designed to walk you through the complete journey from your first day as an AI consultant to becoming an organizational strategic advisor with compounding revenue streams.

You are likely coming from an enterprise transformation background where demand was built in — organizations already knew they wanted the framework, and your job was to deliver it. The AI consulting market is different. The market is competitive, the demand must be created, and the value must be proven through measurable business results. This playbook shows you exactly how to do that.

The Six Phases of Your Journey

This playbook is organized around six sequential phases that build on each other:

- **Phase 1: PREPARE** — Become what you sell. Build your own AI fluency, develop your facilitation and solution-guidance methodology, and master the engagement cycle.
- **Phase 2: ENGAGE** — Find and win private clients through pain-focused marketing, trust-based outreach, and value-based proposals.
- **Phase 3: DELIVER** — Run AI fundamentals training as a transformation engine using the full engagement cycle, from pre-engagement diagnostics through 90-day follow-through.
- **Phase 4: SCALE** — Deploy internal AI Champions, cross the POC graveyard, and establish a Center of Excellence.
- **Phase 5: CAPTURE** — Build your case study engine. Every engagement produces documented results that fuel your next sale.
- **Phase 6: DEEPEN** — Become the organizational strategic advisor with three compounding revenue streams.

Start with Phase 1 — even if you are eager to get to market. The preparation phase is not optional. Consultants who skip it consistently underperform those who invest in it.

The Consultant Engagement Cycle: Your Operating System

The Consultant Engagement Cycle is the operational backbone of everything in this playbook. It consists of four steps, Diagnose, Deliver, Embed, and Prove, designed specifically for what you actually do as a consultant. Whether you leverage established training content for brand credibility or design bespoke programs from scratch, the engagement cycle wraps everything in the consulting rigor that creates lasting transformation.

These four steps are not an abstract philosophy — they are a fully operationalized methodology with specific activities, decision points, checklists, and outputs that you execute at every stage of every engagement. The engagement cycle is what separates you from every other AI training provider in the market.

While most competitors deliver a class and move on, you deliver a complete transformation cycle. Here is how each step maps to your work:

Diagnose

Before any training begins, you adapt your methodology to this client's specific pain, context, and roles. You interview the champion, refine learner personas, and select the relevant proxy performance indicators that will prove the training worked. Whether you are leveraging established courseware or building bespoke content, your job is to listen, diagnose, and adapt. This drives your prospecting (Phase 2) and your pre-engagement work (Phase 3).

Deliver

You customize your AI fundamentals training to the client's industry and roles, design pre-learning activities, and run the program with a relentless focus on real-world application. Every participant leaves with a personal action plan. You collect Level 1 feedback immediately. Whether you are adapting established content or delivering something fully bespoke, the experience must feel like it was built for them.

Embed

This is the 30-60-90 day follow-through — and it is where your competitors stop and where you earn your consulting hours. You run coaching check-ins, facilitate peer learning networks, deploy performance support tools, and measure behavior change against the proxy indicators you set in Diagnose. This step is non-negotiable. It is what turns training into transformation and what makes you indispensable to clients.

Prove

You systematically measure and report impact across Kirkpatrick's four levels. You build the Program Effectiveness Report, present results to the champion and leadership, and create the evidence base for your next sale. Proof is what turns a one-time sale into a multi-year practice. Prove is where the flywheel begins to spin.

The four steps are not performed once. They are a cycle you repeat with increasing sophistication. You run Diagnose-Deliver-Embed-Prove for the initial AI fundamentals engagement, then run them again for the AI Champion development engagement, then again for each new department you expand into. Each cycle builds on the data and insights from the last.

The Engagement Cycle

Diagnose / Deliver / Embed / Prove

Phase 1: PREPARE — Become What You Sell

Before you can sell transformation, you must experience it.

The most common mistake new consultants make is rushing to market before they have built genuine AI fluency themselves. You cannot credibly promise behavior change to a client if you have not gone through that change yourself. Phase 1 is about building your credibility from the inside out.

1.1 Build Your Own AI Fluency

Your first job is to develop deep, practical AI literacy that goes well beyond surface-level familiarity. This means immersing yourself in the same journey you will later guide clients through: moving from awareness to daily application to genuine fluency.

- Immerse yourself in AI tools across multiple categories: large language models, image generation, code assistants, workflow automation, and data analysis. Use them daily in your own consulting practice until they become second nature.
- Study the landscape of AI fundamentals training available in the market. Take courses, attend workshops, and evaluate what works and what falls flat. Understand what makes training stick versus what gets forgotten in a week.
- Apply a critical lens to your own consulting practice. How are AI forces reshaping the advisory market? What capabilities are becoming commoditized, and where is new value being created? How should you respond?
- Document your own 30-60-90 day behavior changes. What AI tools did you adopt? What workflows changed? What results did you see? This becomes your first "case study," your most authentic selling tool because you lived it.
- Develop the ability to assess AI readiness across different roles and functions. Understand how a marketer's AI journey differs from a finance analyst's or an engineer's.

Wisdom from The Trusted Advisor (Maister, Green, Galford): "The first sale is always to yourself." If you are not genuinely convinced that this program creates real value, your prospects will sense it. Authenticity is not a technique, it is a prerequisite.

1.2 Develop Your Facilitation and Solution-Guidance Methodology

AI fluency alone does not make you a consultant. You need three distinct capabilities that go beyond personal tool proficiency: the ability to facilitate learning experiences that drive adoption, the ability to guide the identification and development of AI solutions, and the ability to move people from literacy to fluency by going deeper into the field.

Facilitation Capability:

- Learn to design and deliver AI training experiences that create behavior change, whether you leverage established courseware for brand credibility or build bespoke content for specific client needs.
- Develop your facilitation style: Socratic questioning, hands-on exercises, real-world application focus. Training that stays theoretical fails.
- Understand adult learning principles and how they apply specifically to AI adoption (where fear, skepticism, and prior failed attempts are common).

Solution Guidance Capability:

- Build the skills to identify high-value AI use cases within a business context, not just technically interesting applications but ones that solve real pain.
- Learn to guide teams through AI solution development: from identifying the opportunity, through prototyping, to production deployment.
- Understand the common failure modes of AI projects (data quality, scope creep, lack of user adoption) so you can steer clients around them.

The AI Champion Mindset:

- Adopt the identity of a consultant who uses training as an entry point, rather than a trainer who occasionally consults. Training is your most powerful tool, but measurable business transformation is the product.
- Your job is "influence without direct control." You will be advising organizations where you have no formal authority.

- Understand the AI Champion role from both sides: as a consultant, you are the external champion of change. Inside client organizations, you will identify and develop internal AI Champions who form a collaborative network.
- Broad AI literacy creates the foundation; the AI Champion development pathway creates the small, focused network that turns literacy into lasting organizational capability.

Wisdom from Flawless Consulting (Peter Block): "A consultant is a person in a position to have some influence over an individual, a group, or an organization, but who has no direct power to make changes or implement programs." Your influence comes from your expertise and the trust you build, not from organizational authority.

1.3 Build Your Strategic Foundation

Before you go to market, you need a strategy — and not in the vague, aspirational sense. A real strategy requires three things: a clear-eyed diagnosis of your situation, a guiding policy for how you will compete, and a set of coherent actions that execute that policy.

Diagnose your market position:

- What industries or functional areas do you have existing credibility in?
- Where are the AI adoption pain points most acute in those industries?
- Who are your competitors in this space, and what are they doing well or poorly?
- What is your unique advantage? (Your enterprise transformation experience gives you organizational change credibility that pure AI trainers lack.)

Define your guiding policy:

- Pick 2–3 target niches where you will concentrate your effort. Do not try to serve everyone.
- Decide whether you will lead with broad AI fundamentals training, deeper AI Champion development, or a combined offering.
- Define how you will differentiate: your personal transformation story, your industry expertise, your commitment to measurable outcomes.

Set coherent actions:

- Develop your personal Point of View on AI transformation — specific to your chosen niches, not generic.
- Build a 90-day go-to-market plan with specific outreach targets, content creation goals, and networking activities.
- Identify 10–15 specific organizations and contacts in your target market to begin building relationships with.

Wisdom from Good Strategy/Bad Strategy (Richard Rumelt): "A good strategy honestly acknowledges the challenges being faced and provides an approach to overcoming them." Do not try to be everything to everyone. Pick your niche, own it, and expand from a position of strength.

1.4 Master the Engagement Cycle as Your Delivery Methodology

The Consultant Engagement Cycle is how you will operate at every client engagement. Study it thoroughly before your first engagement.

Diagnose Preparation — What to Build Before Your First Client:

- Conduct market and audience research for your target niches
- Build target learner personas and archetypes for your focus industries
- Develop value propositions that connect AI training outcomes to specific business pains
- Create proxy performance indicators — leading indicators that suggest progress towards outcomes
- Build a generic business case/justification framework that prospects can use to get internal budget approval

Deliver Preparation:

- Develop or source your AI fundamentals training content and understand how to customize it per client
- Know the delivery standards so you can maintain quality at scale
- Prepare pre-learning activity templates: self-assessments, goal-setting exercises, and pre-reading materials

Embed Preparation:

- Build your follow-through toolkit: self-coaching guides, peer support network templates, post-course reinforcement schedules
- Prepare job aids, quick reference guides, and checklists
- Design your 30-60-90 day check-in structure with agenda templates

Prove Preparation:

- Design your standardized evaluation plan: surveys for each Kirkpatrick level, assessment rubrics, and reporting templates
- Set up your Program Effectiveness Report template with data visualization standards
- Prepare your case study documentation framework so you capture the right data from day one

Phase 2: ENGAGE — Find and Win Private Clients

Pain-focused marketing that earns the right to be heard.

This phase is about building your pipeline of private engagement opportunities. The emphasis is on private engagements — customized training and consulting delivered to a single organization — rather than public classes. Private engagements are higher value, create deeper relationships, produce better case studies, and lead to the recurring revenue streams described in Phase 6.

2.1 Identify Target Pain Points

Every successful engagement starts with a pain point. You are not selling AI training — you are solving a specific business problem that happens to require AI adoption as part of the solution.

Map pain points by department and function:

- **Marketing:** Content creation bottlenecks, inconsistent brand voice at scale, slow campaign cycles, inability to personalize at scale.
- **Operations:** Manual reporting consuming analyst time, data silos preventing cross-functional visibility, slow process improvement cycles.
- **Finance:** Time-intensive reconciliation processes, delayed forecasting, manual compliance documentation.
- **HR/People:** Slow onboarding documentation, inconsistent policy application, training content that cannot keep up with organizational change.
- **Engineering/Product:** Developer productivity plateaus, code review bottlenecks, documentation debt, testing coverage gaps.
- **Customer Service:** Response time pressure, knowledge base gaps, inconsistent quality across agents.

For each pain point, prepare a hypothesis about the measurable business impact. Use your Diagnose proxy performance indicators to quantify the potential value.

Wisdom from The Minto Pyramid Principle (Barbara Minto): Lead with the answer. When you approach a prospect, do not start with "We offer AI training." Start with "Your marketing team is spending 15 hours per week on content creation that AI-assisted workflows could reduce to 5 hours. Here is how we know."

2.2 Build Your Outreach Engine

Your outreach strategy should be built on trust, not transactions. You are not cold-calling with a sales pitch. You are building relationships by providing genuine value before you ever ask for anything in return.

Trust-Based Marketing Principles:

- Focus on your customer, not on your offering
- Focus on relationships, not transactions
- Be transparent with prospects and clients — share what you know, including when you do not have all the answers
- Collaborate to drive new business — abundance mindset: sharing the market grows the market

Content Strategy — Give to Get:

- Write about the pains you solve, not the courses you sell
- Share anonymized results from your own transformation and client engagements
- Offer diagnostic value before asking for anything: free assessment frameworks, industry-specific AI readiness checklists
- The best pitch is no pitch. When you lead with genuine expertise, prospects come to you.

Networking and Relationship Building:

- Leverage your existing professional network — many of those organizations are now facing AI adoption challenges
- Attend industry events, not as a vendor, but as a thought leader
- Build relationships with complementary consultants who can refer you when AI adoption comes up

2.3 The Discovery Conversation

When a prospect is ready to talk, your goal is not to pitch — it is to understand. The discovery conversation is where you earn the right to propose a solution.

The Five Phases of Consulting Engagement:

- **1. Entry and Contracting:** You and the client explore the problem and agree on how to work together.
- **2. Discovery:** You dig deeper into the real problem — which is often different from the presenting problem.
- **3. Feedback:** You share what you have found with the client, including things they may not want to hear.
- **4. Decision:** Together, you agree on a course of action.
- **5. Implementation:** You execute — which in your case means running the engagement cycle.

The Trust Equation in Practice:

In every interaction, your prospect is unconsciously evaluating you against four variables:

- **Credibility:** Do you know what you are talking about? Demonstrate deep knowledge without showing off.
- **Reliability:** Do you follow through? If you promise to send something after the meeting, send it within 24 hours.
- **Intimacy:** Is it safe to share real problems with you? Create space for honesty.
- **Self-Orientation (the denominator):** Are you focused on them or on closing the deal? The single fastest way to destroy trust is to make the conversation about your sale.

Discovery Question Framework:

- "What is the biggest challenge your team faces with AI adoption right now?"

- "What have you tried so far? What worked and what didn't?"
- "If this problem were solved in 90 days, what would be different? How would you measure it?"
- "Who else in the organization is affected by this? Who would need to be involved?"
- "What does success look like for you personally in this initiative?"

2.4 Secure a Champion

No private engagement succeeds without an internal champion — someone inside the client organization who owns the pain point, has budget authority (or influence over it), and is willing to stake their reputation on the initiative.

Identifying Your Champion:

- Look for the person who feels the pain most acutely
- They must have organizational influence: the ability to allocate people's time, secure budget, and shield the initiative from political interference
- They must be willing to be accountable for organizational participation

The Champion Commitment Model:

Before you proceed to a formal proposal, your champion must commit to three things:

- **1. Participation:** They will ensure the target participants are freed up for the full learning experience
- **2. Measurement:** They will work with you to define success metrics upfront and support data collection
- **3. Sponsorship:** They will visibly sponsor the initiative — communicating its importance to leadership and removing organizational barriers

If your champion cannot or will not commit to these three things, the engagement is at risk. It is better to walk away from a deal than to deliver a half-supported engagement that produces mediocre results.

2.5 Close the First Engagement

Pricing and closing the engagement is where many consultants falter. The key principle: price on the value of outcomes, not on the number of days you will work.

Value-Based Pricing Principles:

- Never price by the hour or by the day. Hourly pricing commoditizes your work.
- Start with Conceptual Agreement: objectives, how success will be measured, and the value of achieving those outcomes.
- Once value is established, your fee is a fraction of that value.
- Offer tiered options so the client has choices:

Option	Scope
Option 1: Pilot	One-department AI Fundamentals delivery with Level 1 and 2 evaluation
Option 2: Follow-Through	Full 30-60-90 day Embed follow-through with Prove measurement
Option 3: Full Transformation	AI Fundamentals + AI Champion + CoE setup + 6-month advisory

Phase 3: DELIVER — Run AI Fundamentals Training as a Transformation Engine

Training is the entry point. Behavior change is the product. The engagement cycle is your operating system here.

AI fundamentals training is your universal entry point, designed for every knowledge worker in the organization and tailorable to any department, role, or function. Whether you leverage established courseware for credibility or design bespoke programs, this is where your methodology becomes visible to the client. Every competitor in the market can deliver a training class. What separates you is the complete engagement cycle, from pre-engagement diagnostics through measured, documented results.

3.1 Diagnose: Understand This Client's World

Before a single class is delivered, you run the Diagnose step — adapted from your market-level work (Phase 1.4) to this specific client's context. This is a paid diagnostic activity that demonstrates your rigor and sets the engagement up for measurable success.

Steps:

- Refine your learner personas for this organization. Who exactly will be in the initial training cohort?
- Adapt your standard outcomes to this client's pain and context. Translate general value propositions into client-specific outcomes.
- Define observable behaviors for each outcome. Be specific: "Use AI to draft first versions of client communications" not "Be more productive with AI."
- Select relevant proxy performance indicators from your established indicator library.
- Co-create the business case with your champion using the business case framework.

Decision Point:

Do the defined outcomes, behaviors, and indicators give you a clear, measurable target? Can your champion use the business case to justify the investment internally? If no, continue refining.

Outputs:

- Client-specific learner persona profiles
- List of potential business outcomes and associated value propositions
- Map of observable behaviors and proxy performance indicators
- Co-created business case/justification document

3.2 Deliver: Customize and Run the Training

With outcomes defined in Diagnose, you customize your AI fundamentals content to this client and execute the complete learning experience.

Pre-Learning Design:

- Self-assessment for participants to gauge current AI knowledge and comfort level
- Pre-reading or short video introducing core AI concepts and the transformation journey ahead
- Goal-setting exercise: each participant identifies 2–3 specific work tasks they want to apply AI to
- Optional: Brief manager notification package

Customization and Delivery:

- Replace generic examples with examples from their industry
- Establish a shared vocabulary for AI transformation that participants will use across the organization
- Focus facilitation on engagement and application, not content coverage
- Use the Socratic method: ask questions that lead participants to discover answers
- Create psychological safety — participants need to feel comfortable admitting what they do not know
- Build in formative assessments: knowledge checks, quick polls, and reflection activities

If Using Multiple Facilitators:

- Follow Train-the-Trainer (TTT) standards to ensure consistent quality
- Use standardized facilitator guides and participant workbooks
- Establish a facilitator certification process
- Conduct periodic observation and feedback

Action Planning:

At the end of training, every participant completes a structured action plan:

- What are the 2–3 specific work tasks I will apply AI to in the next 30 days?
- What tools or techniques from today's training will I use?
- What does success look like? How will I know it worked?
- What obstacles might I face, and how will I address them?
- Who can I partner with or go to for support?

3.3 Embed: Make It Stick — The 30-60-90 Day Structure

This is where your competitors stop. This is where you earn your consulting hours. This is what makes you indispensable.

The 30-60-90 day follow-through is where training becomes transformation — and where the majority of your billable consulting hours live.

The 30-Day Milestone: Initial Application

- Weekly check-ins with participants (group format, 30–60 minutes)
- Deploy self-coaching guides
- Facilitate peer learning sessions
- Monitor proxy performance indicators
- Share early results with your champion
- Deploy quick-reference cards, checklists, and prompt engineering templates

The 60-Day Milestone: Deepening Adoption

- Shift from weekly to bi-weekly check-ins as participants gain confidence
- Measure productivity changes against proxy indicators
- Identify and address blockers: organizational resistance, technology limitations
- Foster peer support networks
- Provide post-course reinforcement: curated resources, tips, links

The 90-Day Milestone: Sustained Integration

- Document measurable outcomes for each participant and the group
- Identify the next wave of use cases
- Consultant presents formal results to champion and leadership
- Collect Level 3 and Level 4 data through structured surveys
- Identify high-potential participants who could become internal AI Champions

Key Insight

Embed is the biggest revenue generator in your engagement model. The coaching check-ins, peer facilitation sessions, and performance support tool deployment are all billable consulting hours. Consultants who skip or shortcut the Embed step consistently produce weaker results, weaker case studies, and shorter client relationships.

3.4 Prove: Show the Impact

Systematic measurement is what turns a training engagement into a provable business investment. Proof is what turns a one-time sale into a multi-year practice.

The Four Levels of Evaluation:

- **Level 1 — Reaction:** Collected immediately after training. Measures satisfaction and perceived relevance.
- **Level 2 — Learning:** Measured through assessments during training. Did participants acquire the knowledge and skills?
- **Level 3 — Behavior (Self-Reported):** Collected during the 30-60-90 day check-ins via structured surveys. Are participants actually applying what they learned?
- **Level 4 — Results (Indicative):** Collected at the 90-day milestone. What measurable business outcomes can be attributed to the training?

The Program Effectiveness Report:

- Synthesize all four levels into a clear narrative
- Use data visualization to make results easy to understand
- Present to champion and leadership at the 90-day milestone
- Create a market-facing version that becomes your case study (Phase 5)

Wisdom from The McKinsey Way (Ethan Rasiel): Structure your results using the MECE principle — Mutually Exclusive, Collectively Exhaustive. This prevents double-counting and ensures nothing is missed.

Phase 4: SCALE — Deploy AI Champions and Build the CoE

Move from doing it yourself to building the client's internal capability. The engagement cycle repeats at a higher level here.

Phase 3 proved the concept with AI Fundamentals. Phase 4 is about scaling that success across the organization through the select few: AI Champions. These are not just top performers — they are the individuals who will form a cross-functional collaborative network that drives real AI adoption across the enterprise.

4.1 Identify Internal AI Champions

AI Champions are selected from your AI fundamentals training graduates. They have already completed the broad literacy program and demonstrated exceptional adoption and peer influence.

Selection Criteria:

- High adoption scores: they actually used the tools consistently during the 30-60-90 day period
- Peer influence: other participants mention them as sources of help and inspiration
- Cross-team visibility: they are known and respected beyond their immediate team
- Curiosity and initiative: they explored beyond what was taught, experimented with new use cases
- Coaching temperament: they enjoy helping others learn, not just doing the work themselves

Aim to identify 5–10 AI Champion candidates per engagement. Present your recommendations to your champion with supporting Prove data.

4.2 Deliver the AI Champion Development Program — Engagement Cycle #2

The AI Champion development program runs the full engagement cycle again at a higher level, with a focus on three core capabilities:

- **Driving Adoption of Existing Tools:** AI Champions become the departmental champions who ensure AI tools already deployed are actually used effectively.
- **Guiding AI Solution Development and Deployment:** AI Champions identify high-value use cases, guide development, and manage deployment.
- **Building the Collaborative Network:** AI Champions across departments form a cross-functional network that shares best practices and creates organizational momentum.

Diagnose for AI Champions:

- Define outcomes specific to the AI Champion role: ability to coach peers, drive tool adoption, guide AI solution development
- Proxy indicators: number of peers coached, department-wide adoption rates, new AI solutions identified

Deliver for AI Champions:

- Design and deliver the complete experience with emphasis on leadership, coaching, and advanced AI application
- Include real-world scaling assignments: each AI Champion is tasked with a specific adoption project

Embed for AI Champions:

- Deploy an AI Champion-specific toolkit: coaching conversation templates, adoption tracking tools, resistance-handling guides
- Establish the cross-functional network: regular meetups, shared collaboration channels, joint problem-solving sessions

Prove for AI Champions:

- Measure the AI Champions' impact on their teams and departments — not just their own skills, but the adoption rates they drove

4.3 Cross the POC Graveyard

The "POC Graveyard" is the most dangerous moment in any transformation initiative. A successful pilot in one department is celebrated — and then nothing happens.

The Scaling Playbook:

- Document the pilot results with hard numbers using your Prove reports.
- Present to adjacent departments using their pain language, not the pilot department's. Translate the results.
- Use AI Champions as internal evangelists. A peer saying "This actually worked for us" is 10x more credible than an outside consultant.
- Create an executive-level "State of AI Transformation" briefing.
- Apply Rumelt's focus principle: do not try to scale everywhere at once. Pick the next highest-impact department.

Wisdom from Good Strategy/Bad Strategy (Rumelt): "Good strategy requires leaders who are willing and able to say no to a wide variety of actions and interests." Resist the pressure to spread thin. Concentrated success beats dispersed mediocrity.

4.4 Establish the Center of Excellence (CoE)

The Center of Excellence is built from the AI Champion network — the cross-functional collaborative team you identified and developed through Phases 3 and 4.

CoE Responsibilities:

- AI governance: establishing guidelines for responsible AI use, data privacy, and security
- Best practices: curating and sharing proven AI workflows, prompt templates, and use cases
- Tool evaluation: assessing new AI tools and making recommendations
- Training new cohorts: running AI Fundamentals for new employees and departments
- Measuring enterprise-wide impact: aggregating Prove data across all departments

Your Role on the CoE:

- Serve as the external advisor on the CoE advisory board — this is your long-term relationship anchor
- Provide quarterly strategic guidance on AI trends, tool evolution, and best practices
- Help the CoE avoid common pitfalls: overcomplicating governance, losing momentum, losing executive sponsorship
- This advisory role generates ongoing billable hours

Wisdom from Flawless Consulting (Block): "The goal of every consulting engagement should be to build the client's capability to solve similar problems on their own in the future." By building their internal capability, you have made yourself dispensable as a doer and indispensable as an advisor.

Phase 5: CAPTURE — Build Your Case Study Engine

Every engagement should produce a documented success story.

Case studies are the fuel that powers your growth flywheel. Each documented success makes the next sale easier, reduces the prospect's perceived risk, and builds your reputation as someone who delivers measurable results — not just training.

5.1 The Prove-to-Diagnose Flywheel

Your Prove data is not just for the current client — it is the raw material for every future prospect conversation. Results from Prove feed directly into Diagnose for the next client. Each cycle makes you more precise, more credible, and faster.

Start Documenting from Day 1:

- Do not wait until the 90-day milestone to start building your case study
- Keep a running engagement journal: what happened, what surprised you, what worked better or worse than expected
- Photograph or screenshot (with permission) tangible artifacts: dashboards showing improvement, before/after workflow comparisons

Case Study Template — The SART Structure:

- **Situation:** What was the client's pain point? What was at stake? What had they tried before?
- **Approach:** What did you do? How did you design and deliver the engagement? What made your approach different?
- **Results:** What measurable outcomes were achieved? Include specific numbers: "40% reduction in reporting time," "92% participant satisfaction," "3 new AI-assisted workflows adopted."
- **Testimonial:** In the client's own words, what was the impact?

5.2 Capture Testimonials and Social Proof

When to Ask:

- After the 90-day results presentation, when enthusiasm is highest
- After successful scaling to a second department
- After a positive CoE quarterly review

What to Ask For:

- Permission to use the client's name, title, and company
- A direct quote about the impact — not about you, but about the results they experienced
- Permission to reference specific metrics in your marketing materials

Make it easy. Draft the testimonial for them based on what they have told you, and ask them to edit it.

5.3 Quantify Everything

Structure your results using the MECE principle so that outcomes are comprehensive and non-overlapping:

- **Time Savings:** Hours per week saved on specific tasks, faster cycle times
- **Cost Reduction:** Direct cost savings from efficiency gains, reduced error rates
- **Quality Improvement:** Better output quality, fewer revisions, improved consistency
- **Employee Experience:** Higher satisfaction scores, reduced frustration, increased confidence
- **Competitive Positioning:** Faster time to market, new capabilities unlocked

Wisdom from Say It with Charts (Gene Zelazny): Choose the chart type that matches your message — comparison charts for "before and after," time series for trends. The chart should make your point obvious at a glance.

5.4 Feed the Flywheel

- Each case study makes the next sale easier and faster
- Align case studies to specific industries and pain points for precise matching to new prospects
- Share case studies through your content engine: LinkedIn articles, website, conference presentations
- Update case studies over time with longer-term results — 12-month results are exceptional
- Your Prove reports continuously improve your Diagnose value propositions for the next engagement

Phase 6: DEEPEN — Become the Organizational Strategic Advisor

The endgame: you are not a vendor. You are a strategic advisor.

The Strategic Advisor is not a title you claim — it is a status you earn through consistent delivery of value over time.

6.1 Expand Within the Account

Account expansion follows a natural progression. The relationship must deepen before the scope can widen.

The Relationship Progression:

- **1. Service-Based:** You deliver what is asked. ("Run this training for us.") This is where most vendor relationships live and die.
- **2. Needs-Based:** You anticipate what they need before they ask. ("Based on the Prove data, your operations team would benefit from the same program.")
- **3. Relationship-Based:** They value your perspective beyond the immediate scope. ("What do you think about our AI governance approach?")
- **4. Trust-Based:** You are a strategic partner consulted on organizational decisions. ("We are evaluating three AI platforms. What should we consider?")

Most consultants get stuck at the Service-Based level because they wait to be asked for more. Moving up requires proactive value delivery.

6.2 The Revenue Model in Practice

The power of the AI consultant model is three compounding revenue streams from each client engagement.

Stream 1: Course Fees	Stream 2: Consulting	Stream 3: Case Studies
AI Fundamentals for new cohorts, AI Champion for new waves of champions, refresher sessions as AI evolves.	Diagnose discovery, Embed follow-through, CoE advisory, strategic planning sessions. The most sustainable stream.	Each case study reduces customer acquisition cost. A library of 5-10 strong cases across industries makes you unstoppable.

The Compound Effect:

A single AI fundamentals engagement can generate 6 to 12 months of recurring consulting revenue. Initial training delivery (month 1) leads to 30-60-90 day follow-through (months 2 to 4), which leads to AI Champion development and CoE setup (months 4 to 8), which leads to ongoing advisory (months 8+). Meanwhile, the case study shortens the sales cycle for your next client.

6.3 Selling to the C-Suite

As your relationship deepens, you will increasingly find yourself in conversations with C-suite executives. These conversations operate by different rules.

What Sets C-Suite Conversations Apart:

- Executives have less time and lower tolerance for detail. Lead with impact, not process.
- They care about strategic positioning, competitive advantage, and organizational capability.
- They are making portfolio-level decisions: AI is one of many transformation initiatives competing for attention.
- They evaluate you differently: "Does this person understand my business challenges at a strategic level?"

Preparing for C-Suite Conversations:

- Use Rumelt's strategy kernel to structure your recommendations
- Present enterprise-wide AI transformation roadmaps, not individual training proposals
- Bring data: your Prove data, benchmarks from similar organizations, industry trends
- Shift from tactical to strategic language: not "We will train 50 people" but "We will build organizational AI capability that reduces operational costs by 15%"

6.4 Generate Referrals

Strategic advisors generate referrals naturally — satisfied clients recommend you without being asked. But you should also ask.

When to Ask:

- After delivering measurable results (the 90-day presentation)
- After successful scaling to a second or third department
- After any moment when the client expresses genuine enthusiasm

How to Ask:

- "We have seen great results with your team. Do you know other leaders facing similar AI adoption challenges? I would value an introduction."
- Make it specific: "I am particularly looking to connect with heads of operations or finance in your industry."
- Offer to make it easy: "I am happy to draft an introduction email that you can customize."

Build Your Network Effect:

- Create an industry-specific community of practice across your client base
- Ask champions to speak at events or panels you organize
- Your referral engine compounds over time: each new client generates new referral opportunities

Templates and Tools

The following templates are designed to be adapted to your specific context. They provide structure without being rigid — customize them for each engagement while maintaining the core elements.

A.1 Pain Point Discovery Worksheet

Department	Common Pain Points	AI-Addressable Opportunities	Potential Impact
Marketing	Content bottlenecks, slow campaigns	AI-assisted content, personalization	\$__K / __hrs/ wk
Operations	Manual reporting, data silos	Automated insights, process optimization	\$__K / __hrs/ wk
Finance	Manual reconciliation, manual forecasting	AI-assisted analysis, automation	\$__K / __hrs/ wk
HR / People	Onboarding delays, policy gaps	Automated documentation, training	\$__K / __hrs/ wk
Engineering	Code bottlenecks, doc debt	AI pair programming	\$__K / __hrs/ wk
Customer Service	Response time, knowledge gaps	AI triage, knowledge base	\$__K / __hrs/ wk

A.2 ROI Calculation Template

Metric	Value
Number of participants	—
Average hours saved per participant per week	—
Average fully-loaded hourly cost per participant	\$__
Weekly savings (participants x hours x cost)	\$__
Annual projected savings (weekly x 48 weeks)	\$__
Engagement investment	\$__
ROI ((Savings - Investment) / Investment x 100)	__%

A.3 Discovery Conversation Question Guide

Opening (Understand the Context):

- "Tell me about your team's current relationship with AI tools. What is working? What is not?"
- "What prompted you to explore AI training at this particular moment?"
- "What would be different in 6 months if this initiative succeeded beyond your expectations?"

Pain (Identify the Real Problem):

- "What are the biggest time drains for your team right now?"
- "Where do you see the most frustration or friction in your team's daily workflows?"
- "What have you tried before to address this? What happened?"

Impact (Quantify the Value):

- "If we could solve that problem, what would the impact be — in time, money, or quality?"
- "How does this pain point affect your team's ability to hit their goals?"
- "What is the cost of not addressing this in the next 12 months?"

Stakeholders (Map the Organization):

- "Who else in the organization is affected by this challenge?"
- "Who would need to be involved in or supportive of this initiative for it to succeed?"
- "Who has budget authority for this type of investment?"

A.4 30-60-90 Day Check-In Templates

30-Day Check-In Agenda (Group Session, 45 minutes):

- Quick wins round-robin: Each participant shares one AI application they tried (10 min)
- Challenge workshop: Identify common obstacles and brainstorm solutions (15 min)
- Skill spotlight: Brief demonstration of an advanced technique (10 min)
- Action planning: Each participant sets 2 specific goals for the next 30 days (10 min)

60-Day Check-In Agenda (Group Session, 45 minutes):

- Progress review: Review 30-day goals — what was achieved? (10 min)
- Measurement check: Review proxy performance indicators (10 min)
- Peer coaching pairs: Pair up participants to work through challenges (15 min)
- Scaling discussion: Where else in your workflow could these techniques apply? (10 min)

90-Day Results Presentation Agenda (Champion + Leadership, 60 minutes):

- Executive summary: Key outcomes in 3 bullet points (5 min)
- The journey: What we did, how we did it, with data (15 min)
- Individual highlights: 2–3 participant stories with specific metrics (10 min)
- Lessons learned: What worked, what we would do differently (5 min)
- Recommendation: Where to go from here (10 min)
- Discussion and Q&A (15 min)

A.5 Case Study Documentation Template (SART)

S — Situation:

- Client industry and size: ___
- Department/function involved: ___
- The pain point in their own words: "___"
- Business impact of the pain (quantified): ___

A — Approach:

- Engagement scope: ___
- What we did differently: ___
- Customization highlights: ___
- Duration and structure: ___

R — Results:

- Level 1 (Reaction): Satisfaction score: ___ /5
- Level 2 (Learning): Assessment improvement: ___%
- Level 3 (Behavior): Self-reported adoption rate: ___%
- Level 4 (Results): Business impact metrics: ___

T — Testimonial:

- Champion quote: "___" — [Name, Title]
- Participant quote: "___" — [Name, Title]

A.6 Center of Excellence Charter Template

Mission Statement: [One sentence describing the CoE's purpose]

Scope and Authority:

- AI tool evaluation and recommendation
- AI usage governance and compliance
- Training coordination for new departments and employees
- Enterprise-wide AI impact measurement
- Best practice curation and dissemination

Membership and Roles:

- CoE Lead: [Name] — overall coordination and executive reporting
- AI Champions: [Names] — departmental representatives and coaches
- Executive Sponsor: [Name] — organizational authority and resource allocation
- External Advisor: [Your Name] — strategic guidance and industry perspective

Meeting Cadence:

- Weekly: AI Champion standup (15 min)
- Monthly: Full CoE working session (60 min)
- Quarterly: Executive review with sponsor and advisor (90 min)

A.7 Engagement Proposal Template (Value-Based)

Section 1 — Understanding Your Situation: [2–3 paragraphs reflecting back what you learned in discovery.]

Section 2 — Objectives and Measures of Success: [List the agreed-upon objectives and how success will be measured.]

Section 3 — Our Approach: [Describe the engagement methodology. Emphasize the complete experience.]

Section 4 — Options:

	Option 1: Pilot	Option 2: Follow-Through	Option 3: Full Transformation
Scope	AI Fundamentals + Level 1/2 eval	AI Fundamentals + 90-day Embed + Prove	AI Fundamentals + AI Champion + CoE + 6-mo advisory
Duration	2–4 weeks	4–5 months	8–12 months
Investment	\$__	\$__	\$__

A.8 Champion Commitment Agreement

I, [Champion Name], commit to the following as organizational sponsor of this AI transformation engagement:

- **1. Participation:** I will ensure that designated participants are allocated sufficient time for the full learning experience, including pre-work, the training itself, and the 30-60-90 day follow-through activities.
- **2. Measurement:** I will work with [Consultant Name] to define success metrics upfront and support the data collection needed to measure and report results.
- **3. Sponsorship:** I will visibly sponsor this initiative by communicating its importance to leadership and participants, removing organizational barriers to adoption, and attending the 90-day results presentation.
- **4. Feedback:** I will provide honest, timely feedback throughout the engagement to ensure we are on track.

Champion Signature: _____ Date: _____

Consultant Signature: _____ Date: _____

Quick Reference — Consulting Wisdom

The following frameworks are referenced throughout this playbook.

B.1 The Trust Equation

Source: The Trusted Advisor (Maister, Green, Galford)

Trust = (Credibility + Reliability + Intimacy) / Self-Orientation

- **Credibility:** Your words are believed. Comes from expertise, track record, and how you communicate your knowledge.
- **Reliability:** Your actions are predictable and dependable. Comes from consistency and keeping commitments — especially small ones.
- **Intimacy:** People feel safe sharing with you. Comes from discretion, empathy, and creating psychological safety.
- **Self-Orientation (denominator):** The degree to which you focus on yourself vs. the client. High self-orientation destroys trust faster than anything else.

To increase trust: improve the numerator and decrease the denominator.

B.2 Value-Based Pricing Principles

Source: Value-Based Fees (Alan Weiss)

- Price on outcomes, not inputs
- Conceptual Agreement first: objectives, measures, and value before discussing any fee
- Abundance mindset: do not compete on price — compete on value
- Offer options: give clients 3 tiers of scope and investment
- "Charging by the time unit is unethical because it creates a conflict between the consultant's financial interest and the client's best interest."

B.3 Flawless Consulting — The Five Phases

Source: Flawless Consulting (Peter Block)

- **1. Entry and Contracting:** Explore the problem, establish the relationship, agree on how to work together.
- **2. Discovery:** Dig deeper into the real problem. Gather data. Challenge assumptions.
- **3. Feedback:** Share what you found — including uncomfortable truths. This is where trust is built or broken.
- **4. Decision:** Agree on a course of action. The client decides, with your recommendation.
- **5. Implementation:** Execute the agreed approach.

Key principle: "A consultant is a person in a position to have some influence over an individual, a group, or an organization, but who has no direct power to make changes."

B.4 MECE Problem Structuring

Source: The McKinsey Way (Ethan Rasiel)

MECE stands for Mutually Exclusive, Collectively Exhaustive:

- **Mutually Exclusive:** Each category is distinct with no overlap. A data point falls into exactly one bucket.
- **Collectively Exhaustive:** The categories together cover 100% of the relevant space. Nothing is missed.

Use MECE when structuring your Diagnose analysis, Prove reporting, case studies, and C-suite presentations.

B.5 The Strategy Kernel

Source: Good Strategy/Bad Strategy (Richard Rumelt)

A good strategy contains three elements:

- **1. Diagnosis:** A clear-eyed assessment of the challenge. What is actually going on?
- **2. Guiding Policy:** The overall approach for dealing with the challenge. Not a goal, but a direction.
- **3. Coherent Actions:** Coordinated, feasible steps that execute the guiding policy.

Bad strategy substitutes goals for diagnosis, avoids hard choices, and generates a laundry list of unconnected actions.

B.6 The Pyramid Principle

Source: The Minto Pyramid Principle (Barbara Minto)

Lead with the answer. In any communication, start with your main point, then support it with key arguments, each supported by evidence.

The SCQA Framework for Proposals:

- **Situation:** The context your audience already knows and agrees with.
- **Complication:** The problem or change that disrupts the situation.
- **Question:** The question the complication naturally raises.
- **Answer:** Your recommendation — this is the top of the pyramid.

Example: "Your finance team currently spends 3 weeks on quarterly reporting (Situation). New regulatory requirements will double the workload starting Q3 (Complication). How do you maintain quality without doubling headcount? (Question) An AI-assisted reporting workflow that reduces manual effort by 60% (Answer)."

The Engagement Cycle — Complete Reference

Diagnose

Playbook Phases: Phase 1 (market-level), Phase 2 (prospect-level), Phase 3 (client-level)

Key Activities:

- Market and audience research for your target niches
- Adapt your learner persona templates to the specific client context
- Select and tailor value propositions connecting outcomes to client pain
- Select observable behaviors and proxy performance indicators
- Co-create business case/justification document with champion

Decision Points:

- Are the defined outcomes specific enough to measure?
- Can the champion use the business case to justify investment internally?
- Are the proxy indicators realistic for a low-touch model?

Key Outputs: Client-Specific Persona Profiles, Tailored Value Propositions, Behavior Maps, Proxy Indicator Set, Business Case Document

Revenue Connection: Diagnose activities are billable as pre-engagement diagnostic and discovery consulting.

Deliver

Playbook Phase: Phase 3 (section 3.2)

Key Activities:

- Customize your AI fundamentals training content to client industry, roles, and context
- Design pre-learning activities (self-assessments, goal-setting, pre-reading)
- Execute training with focus on engagement and real-world application
- Create Manager/Team Lead Support Toolkit
- Facilitate action planning at end of training
- Collect Level 1 feedback immediately after delivery

Decision Points:

- Is the customization sufficient to feel client-specific without losing core content?
- Are facilitators certified and consistent (if using multiple)?
- Do all participants have a concrete action plan?

Key Outputs: Customized Content, Pre/Post Activity Packs, Facilitator Guides, Participant Action Plans, Level 1 Feedback Reports

Revenue Connection: Deliver activities constitute course delivery fees.

Embed

Playbook Phase: Phase 3 (section 3.3 — the 30-60-90 structure)

Key Activities:

- 30-day: Weekly coaching check-ins, self-coaching guide deployment, peer learning sessions
- 60-day: Bi-weekly check-ins, proxy indicator measurement, blocker identification, peer network fostering
- 90-day: Outcome documentation, formal results presentation, AI Champion candidate identification
- Deploy and iterate performance support tools throughout
- Post-course reinforcement and resource delivery

Decision Points:

- Are participants applying skills or reverting to old habits?
- Are proxy indicators showing expected movement?
- Which participants show AI Champion potential?

Key Outputs: Coaching Session Records, Peer Network Infrastructure, Performance Support Tool Suite, Progress Reports, AI Champion Candidate List

Revenue Connection: Embed is the primary generator of ongoing coaching and facilitation billable hours. This is the biggest revenue stream in most engagements.

Prove

Playbook Phases: Phase 3 (section 3.4), Phase 5 (case study engine)

Key Activities:

- Collect data across Kirkpatrick Levels 1–4 at appropriate touchpoints
- Analyze and interpret results using MECE structuring
- Create standardized Program Effectiveness Report with data visualization
- Present results to champion and leadership at 90-day milestone
- Develop market-facing impact summary (feeds into case studies)

Decision Points:

- Do the results support the business case created in Diagnose?
- Is the data strong enough for a market-facing case study?
- Do the results justify scaling to additional departments?

Key Outputs: Evaluation Data, Program Effectiveness Report, Leadership Presentation, Market-Facing Impact Summary, Improvement Recommendations

Revenue Connection: Prove measurement and reporting is billable consulting. The market-facing summaries become case studies that reduce customer acquisition cost.

The Engagement Cycle Revenue Connection

Every step in the engagement cycle generates billable value. Understanding this connection ensures you price engagements properly and do not undervalue the post-training work that creates the most lasting impact.

Step	Billable Activity	Revenue Stream
Diagnose	Pre-engagement diagnostic, discovery, persona adaptation, business case co-creation	Consulting Hours
Deliver	Course customization and facilitation, action planning, Level 1 feedback	Course Delivery Fee
Embed	30-60-90 day coaching, peer facilitation, support tool deployment, check-ins, reinforcement	Consulting Hours (biggest stream)
Prove	Evaluation, analysis, reporting, case study development	Consulting Hours + Case Study

The Key Insight

Competitors who deliver only training are leaving 70% of the value on the table. The pre-work (Diagnose), the follow-through (Embed), and the measurement (Prove) are where the deepest client relationships are built, the most consulting hours are billed, and the strongest case studies are created. The engagement cycle is not just a delivery methodology — it is your business model.

AI CONSULTANT PLAYBOOK

Rashid Smith

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