YOUR PRACTICAL AI OPPORTUNITIES

Northline Business Consulting

Spend less time turning conversations into administration.

> Illustrative answers: a two-person consultancy uses email, documents, and spreadsheets. The team reports daily administrative work after client meetings and wants clearer next steps and fewer missed handoffs.

Three places to explore

01 Turn meeting notes into a reviewable action list

AI could extract proposed tasks, owners, dates, and open questions from notes the consultant chooses to provide.

Keep a person in control: A consultant confirms every assignment and deadline. Do not infer agreements or record meetings without appropriate consent.

02 Create a first proposal outline

Use an approved discovery summary and the firm’s own proposal template to draft an outline of the client’s problem, possible work, and open questions.

Keep a person in control: A consultant sets scope, fees, terms, and claims. The draft must not invent services or client commitments.

03 Make onboarding steps easier to track

Use a reusable checklist for signed agreements, kickoff preparation, and requested information, with reminders for incomplete steps.

Keep a person in control: A checklist and scheduled reminders may solve this without AI. Add drafting help only where messages need useful context.

This is an example of the report format, not a customer case study. All business details are fictional. These are preliminary ideas, not verified integration plans or promised savings.

A SENSIBLE PLACE TO START

Try an action-list draft on three sets of sample or appropriately de-identified meeting notes.

Meeting action lists offer a small first experiment: frequent work, a clear input, and an output the consultant can check quickly.

1. Agree on a short output: task, proposed owner, due date if stated, and open questions.
2. Ask the agent to use only the supplied notes and mark missing information explicitly.
3. Have a consultant approve the list before copying it into the existing tracker or emailing a client.

What would make this worthwhile?

Track preparation time, missed action items, and unsupported assignments. Stop and adjust if the drafts imply commitments that were never made.

Tools and setup

Start with the team’s current notes, document template, and task spreadsheet. Evaluate an approved text-drafting tool against those materials. A meeting recorder, new project platform, and automatic client messaging are not prerequisites.

Three things to confirm

- Are meeting notes already captured in a consistent format?
- Where does the team track commitments today?
- Which client confidentiality requirements apply to these notes?

Your next step

Choose the opportunity that best matches your actual workload. Atlas can then review a small example with you and confirm whether the proposed experiment is useful before discussing a larger implementation.

For a real assessment, Atlas reviews the recommendations before delivery and checks any named product’s current capabilities. Sensitive customer records should not be included in the initial assessment.