ACROSS THE TABLE

BUSINESS CONSULTING

INDUSTRY STACK 03 · CONSULTANT

The Consultant Stack

Nine systems for a business where the product is your thinking — and the one industry where AI changes the economics.

Knowledge Article I03

AI Stack Series · acrossthetable.biz

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WHO THIS IS FOR

You sell expertise: management consulting, coaching, bookkeeping, marketing, IT advisory, fractional work of any kind. Your product is what you know and how you apply it. You are probably the business, or one of two or three people who are.

This guide is for the consultant who is busy enough to be tired and not yet systematized enough to grow. The constraint in this business is almost never demand. It is hours.

Read the note in this guide about why this industry moves fast. It is the single most important thing on the page.

START WITH THE WORK, NOT WITH THE APPS

These are not twenty lists of AI apps. Each stack starts with the jobs a particular business performs, then matches AI and conventional software to those jobs. Treat it as a menu to evaluate, not a shopping list.

For this kind of business the work runs in one line, start to finish:

> **THE PATH THE WORK TAKES**
> Lead → Meeting → Proposal → Project → Invoice

Broken into the steps a customer actually moves through:

- Lead
- Discovery
- AI meeting notes
- Proposal
- Project
- Deliverable
- Invoice

Read that line left to right. Somebody becomes a lead, you meet, you propose, you deliver, you invoice. In a consulting business every one of those steps is made of documents and conversations — which is exactly the kind of work that can be assisted.

The leak in most consulting practices is between meeting and proposal. The conversation goes well, and then the proposal takes four days to write because it has to be written from scratch, and by the time it lands the energy has gone out of the deal.

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THE STACK, PIECE BY PIECE

Every tool below is matched to one of those steps. You do not need all of them, and you should not buy all of them at once. Read the “What it is” column first and find the step where your business is losing the most time or money.

Tool	The step it covers	What it is	Price
HubSpot	CRM	Customer records, marketing, sales and service in one platform.	Free CRM; paid hubs per month.
Calendly	Scheduling	Shared booking links tied to your calendar.	Free tier; paid per user/month.
Fireflies / Fathom	Meeting intelligence	Records, transcribes and summarizes meetings, then pushes notes into your other tools.	Free tier; paid per user/month. / Generous free tier; paid per user/month.
ChatGPT / Claude	Research and deliverables	OpenAI’s general assistant — writing, analysis, research and, with Agent mode, multi-step work.	Free tier; paid plans per user/month.
Notion	Knowledge	Docs, wikis and databases with AI search across them.	Free tier; paid per user/month.
Asana / ClickUp	Projects	Projects, tasks and workloads with AI summaries.	Free tier; paid per user/month.
PandaDoc	Proposals and contracts	Proposals, quotes and contracts with e-signature.	Per user/month.
QuickBooks	Accounting	The small-business accounting standard — books, invoicing, reporting.	Per month by plan.
Zapier	Automation	Connects thousands of apps and AI models with no code.	Free tier; paid by task volume.

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Where two names share a row with a slash between them, they do the same job and you pick one, not both. The description shows the first of the two.

A solo consultant can run this whole stack on free and low tiers for a long time. The paid plans start to matter when you add a second person who needs to see what you see.

What to watch out for in each one

None of these are reasons not to buy. They are the things owners tell us they wish they had known first.

- HubSpot — Costs step up sharply by tier and contact count.
- Calendly — Set buffers or your day disappears.
- Fireflies — Tell people they're being recorded. Set a retention rule.
- Fathom — Fewer integrations than the bigger platforms.
- ChatGPT — It sounds confident when it's wrong. Check anything that touches money, law or a customer.
- Claude — Same rule as any assistant: verify facts and never paste data you wouldn't email.
- Notion — Becomes a junk drawer without structure.
- Asana — Structure only works if everyone updates it.
- ClickUp — Configuration can become the project.
- PandaDoc — Template setup takes an afternoon.
- QuickBooks — Only as clean as your categorization habits.
- Zapier — Task-based pricing climbs fast once it works.

WHERE AI ACTUALLY FITS IN THIS BUSINESS

Research, proposal generation, meeting summaries, client analysis, report creation, reusable knowledge.

In plain terms, that means:

- Turning a recorded discovery call into the first draft of the proposal, with the client's own words and numbers in it, the same afternoon.
- Doing the background reading on an industry you are new to, fast enough to walk into the first meeting sounding prepared.
- Producing the deliverable — the framework, the assessment, the readout deck — in a fraction of the time, then spending your hours on the judgment instead of the formatting.
- Writing the follow-up notes after every call so nothing agreed to gets lost.
- Turning one piece of your thinking into the article, the newsletter and the post without writing it three times.

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Here is the honest version of what this means. If your fee is tied to hours and AI cuts your hours, AI cuts your income. The consultants who do well with this move toward pricing the outcome rather than the time. That is a business-model decision, not a software decision, and it is worth more thought than any tool on this list.

WHY THIS ONE MOVES FAST

So much of the product is knowledge work — this is one of the easiest businesses to make heavily AI-assisted.

The flip side of moving fast is that the value you add has to move up with it. If a client can get the first draft from a chatbot, you are no longer paid for the first draft. You are paid for knowing which draft is wrong.

WHAT TO SET UP FIRST

Do these in order. Finish one before you start the next. Most owners who try to do all of it in one month end up using none of it.

1. **Put every conversation in one place** A CRM, even the free tier of one. The deals you lose in this business are usually the ones you forgot to follow up on, not the ones you were beaten on.
2. **Kill the scheduling back-and-forth** A scheduling link costs you nothing on the free tier and removes the four emails it takes to find a time. It also makes you look like a business rather than a busy individual.
3. **Record and transcribe your calls** With consent. This is the foundation that makes everything else faster, because the proposal, the notes and the follow-up all come out of what was actually said.
4. **Build a proposal system, not a proposal** One structure, reused. The job becomes editing rather than writing, and your proposals start going out the same week as the meeting.
5. **Then add knowledge and project tools** A knowledge base and a project tracker pay off once you have enough repeat work to have a method. Before that they are tidy-looking procrastination.

WHAT IT COSTS TO START

Nearly everything in this stack is priced per user per month. For a solo practice that is the cheapest possible shape: you pay for one seat. It also means the cost roughly doubles with your second hire, so know that before you make it.

The one exception is the AI assistant, which is also per user but buys the largest change in output of anything on this list. If you only pay for one thing in this stack, pay for that.

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The free tiers here are unusually generous. A consultant can run a credible practice on free CRM, free scheduling, free knowledge base and one paid AI plan. Upgrade when a specific limit is in your way, not on principle.

The price column in the table above tells you how each one charges — per user, per location, per contact, or a percentage of every sale — not what you will pay. That is deliberate. The charging model is what decides whether a tool stays affordable as you grow, and it is the part that does not change every quarter. Get the current dollar figure from the vendor's own pricing page before you budget.

THE RULES UNDERNEATH ALL OF IT

Legal · Privacy · Data protection · Security · Compliance · Records · Audit · Risk · Human oversight — underneath every one of the twenty stacks, not an afterthought.

Client confidentiality is the whole business. Before you put a client document into any AI tool, know whether that vendor trains on your input, and turn it off where you can. Many business plans do not train on your data; most free consumer tiers are a different conversation.

If your client is in a regulated field — healthcare, legal, financial — their rules travel with their data into your hands. Ask them what you are permitted to use before you use it.

Recording calls requires consent, and in some states consent from everyone on the call. Say it out loud at the start and note it in the transcript.

Your contract should say what tools you use and how client material is handled. Clients increasingly ask. Having the answer ready is a selling point.

MISTAKES THAT COST THE MOST

- Selling hours while using tools that reduce hours, and quietly taking a pay cut for being efficient.
- Writing every proposal from a blank page.
- Keeping the method in your head, which caps the business at exactly one person forever.
- Using a free consumer AI tier for confidential client work because the paid plan felt like an expense.
- Building a beautiful knowledge base before you have a repeatable method to put in it.

THE CEO DECISION

- What are you actually selling: hours, or an outcome? Your answer decides whether AI helps you or undercuts you.
- How long does it take you to get a proposal out after a good meeting? What would it be worth to halve that?

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- Is your method written down anywhere someone else could follow it?
- Which of your deliverables could be eighty percent assembled before you touch it?
- What are you doing on a Tuesday that a client would never agree to pay for?

YOUR QUICK REVIEW

- ☐ Every lead and conversation lives in one system.
- ☐ Clients book time with a link instead of an email thread.
- ☐ My calls are recorded and transcribed, with consent.
- ☐ My proposals start from a structure, never a blank page.
- ☐ I know whether the AI tools I use train on my client material.

ADDITIONAL RESOURCES

Tool	Where to find it	What it is for
HubSpot	www.hubspot.com	Small businesses that want one system of record.
Calendly	calendly.com	Ending the back-and-forth on meeting times.
Fireflies / Fathom	fireflies.ai / fathom.video	Teams who keep losing decisions made on calls.
ChatGPT / Claude	chatgpt.com / claude.ai	Your default thinking partner when you want one tool that does most jobs well.
Notion	www.notion.com	Your company knowledge in one searchable place.
Asana / ClickUp	asana.com / clickup.com	Teams who need visible ownership and dates.
PandaDoc	www.pandadoc.com	Sales documents that need to look good and get signed.
QuickBooks	quickbooks.intuit.com	Clean books your accountant already knows how to read.
Zapier	zapier.com	Your first automations, and the widest app coverage.
Across the Table AI	acrossthetable.biz/	Fifteen minutes. Tells you which job

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Tool	Where to find it	What it is for
Assessment	#assessment	to start with before you buy anything.
The Scaling Edge	acrossthetablebiz.substack.com	Weekly newsletter for owners without a business background.

Go deeper on the pieces

Each of these is a full guide comparing the three tools that do that job:

- Run the work — acrossthetable.biz/knowledge-articles/run-the-work/ (covers Notion, ClickUp, Asana)
- Ask and reason — acrossthetable.biz/knowledge-articles/ask-and-reason/ (covers ChatGPT, Claude)
- Capture meetings — acrossthetable.biz/knowledge-articles/capture-meetings/ (covers Fireflies, Fathom)
- Connect the tools — acrossthetable.biz/knowledge-articles/connect-the-tools/ (covers Zapier)
- Fill the pipeline — acrossthetable.biz/knowledge-articles/fill-the-pipeline/ (covers HubSpot)

CONTINUE LEARNING

Start with the Across the Table AI Assessment. Fifteen minutes, and it starts from the jobs your practice performs rather than from a tool list.

For the detail on a single piece, the guides above compare the three leading tools for that job, in the same plain language.

READ AND CONNECT WITH ACROSS THE TABLE

Across the Table website: https://acrossthetable.biz

The Scaling Edge newsletter: https://acrossthetablebiz.substack.com

YouTube: https://www.youtube.com/@AcrossTheTableConnie

LinkedIn: https://www.linkedin.com/in/connie-jacobo-ramirez

Questions: info@acrossthetable.biz · 480-582-4716

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ACROSS THE TABLE BUSINESS CONSULTING

101 N First Ave, Suite 2325-1495, Phoenix, AZ 85003

info@acrossthetable.biz · 480-582-4716 · acrossthetable.biz