AI PILOT TIPS

Free Professional Services AI Prompt Pack

10 guarded prompts for expert-led local firms

Professional service firms can use AI to reduce admin drag, organize intake notes, draft follow-ups, and document repeat processes. The safest use cases are operational and communication support, not regulated advice.

Use these prompts for attorneys, accountants, consultants, real estate service providers, insurance agencies, and other expert-led firms. Keep a qualified person in the review loop before sending anything to a client, prospect, regulator, court, tax authority, lender, or public website.

1. New Inquiry Summary Prompt

Use this after a web form, phone note, or intake email.

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> Turn this new inquiry into a concise internal summary for a professional service firm. Include: who contacted us, what they need help with, relevant dates, urgency, possible service category, missing information, and recommended next step. Do not provide legal, tax, financial, medical, or other regulated advice. Inquiry notes: [paste notes]

2. Follow-Up Email Draft Prompt

Use this when a prospect needs a simple next-step message.

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> Draft a short follow-up email to a prospective client for a [firm type]. Thank them for reaching out, summarize the next step, ask for any missing information, and avoid giving advice or making guarantees. Keep it professional and easy to understand. Context: [paste context]

3. Consultation Prep Checklist Prompt

Use this to prepare before a discovery or consultation call.

> Create a consultation prep checklist for a [firm type] meeting with a prospective client about [general topic]. Include documents to request, questions to ask, items to verify, and topics that require qualified professional review. Do not provide advice or conclusions.

4. Client Document Request Prompt

Use this to make document requests clearer.

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> Write a clear client document request email for a [firm type]. Group requested items by category, explain why each category is needed in plain language, and include a polite deadline. Do not include advice, legal conclusions, tax recommendations, or guarantees. Documents needed: [paste list]

5. Meeting Notes Cleanup Prompt

Use this after client calls.

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> Clean up these meeting notes for internal use. Create sections for: attendees, goals discussed, facts shared by the client, decisions made, open questions, follow-up tasks, owner, and due date. Flag anything that requires professional review. Do not invent facts. Meeting notes: [paste notes]

6. FAQ Draft Prompt

Use this for general website FAQs that avoid regulated advice.

> Draft general FAQ answers for a [firm type] website about [topic]. Keep answers educational and non-advisory. Add a note where a person should consult a qualified professional for advice based on their specific situation. Avoid promises, outcomes, and jurisdiction-specific claims unless provided.

7. Review Response Prompt

Use this for public review replies.

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> Write a short professional response to this customer review for a [firm type]. Thank the reviewer, keep it warm but restrained, avoid mentioning private client details, and do not discuss case, tax, financial, or personal information. Review: [paste review]

8. Monthly Client Update Prompt

Use this for non-advisory status updates.

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> Draft a plain-English monthly update for a client. Include work completed, items waiting on the client, upcoming milestones, and next steps. Keep the wording factual. Do not include regulated advice, strategy recommendations, or guarantees. Notes: [paste notes]

9. SOP Builder Prompt

Use this for repeat internal workflows.

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> Turn this repeat professional-services task into a simple SOP. Include purpose, owner, inputs, step-by-step process, quality checks, review requirements, and handoff notes. Highlight any step where a qualified professional must review before sending or filing. Task: [describe task]

10. Scope Boundary Prompt

Use this to clarify what a draft message should and should not say.

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> Review this draft for scope and risk. Identify any language that sounds like legal, tax, financial, medical, or regulated advice; any promises or guarantees; and any private client details that should be removed. Then suggest a safer, more general version. Draft: [paste draft]

Human Review Checklist

Before using an AI-assisted output:

- Did a qualified person review it?
- Does it avoid advice for a specific legal, tax, financial, medical, or regulated situation?
- Does it avoid guarantees and outcome promises?
- Does it avoid private client information?
- Does it clearly state the next operational step?
- Does it match the firm’s professional tone?

Best First Workflow

Start with new inquiry summaries. They are low-risk, easy to review, and useful because they help the team respond faster without turning AI into an advice engine.

For a broader implementation plan, use the Local Business AI Starter Kit (https://aipilottips.com/local-business-ai-starter-kit/).