AISEVAK.IN · TOOL CATALOGUE

Consulting & Professional Services — 102 tools

All tools · at-a-glance descriptions · Generated 27 Aug 2026

This is the full list of AiSevak tools in this industry, each with a short description of what it produces. Open any tool on aisevak.in to run it.

Business Development & Proposals

Consulting Proposal Writer

Get a win-ready consulting proposal — executive summary, understanding of need, approach and methodology, deliverables, timeline, team, commercials and a why-us. Fill in your details below.

Statement of Work (SOW) Builder

Define scope so nothing slips or creeps — a SOW with objectives, in-scope and out-of-scope, deliverables with acceptance criteria, timeline, responsibilities, assumptions and dependencies, and commercials with a change process. Fill in your details below.

Pitch Deck Builder

Get a crisp pitch deck outline — slide by slide (problem, insight, approach, solution, proof, team, commercials, next steps) with content and talking points, plus the story arc. Fill in your details below.

Capability / Credentials Deck

Showcase what your firm can do — a credentials deck outline (about us, services, approach, case studies, team, clients, differentiators, contact), how to frame credentials credibly and where to add proof. Fill in your details below.

RFP Response Builder

Answer an RFP completely and competitively — a structured response (understanding, approach, team and experience, methodology, timeline and pricing, a compliance matrix addressing each requirement) and win themes. Fill in your details below.

Case Study Writer

Turn results into compelling proof — a case study with headline, client context, challenge, approach, solution, quantified results and a testimonial placeholder. Verify results and get client consent to publish. Fill in your details below.

Lead Qualification Framework

Chase only the right opportunities — qualification criteria (fit, budget, authority, need, timeline), a scoring approach, discovery questions and red flags for when to decline. Fill in your details below.

Pricing Options Builder

Present pricing that closes — tiered options (essential, standard, premium) with scope, fee basis, price and best-for, plus anchoring and payment terms. Fill in your details below.

Sales Follow-Up Templates

Follow up without being pushy — templates per stage (post-meeting, post-proposal, nudge, break-up, re-engage) across email, WhatsApp and LinkedIn, with a suggested cadence. Fill in your details below.

Engagement & Delivery

Engagement Plan Builder

Get a phased engagement plan — discovery, analysis, recommendations and implementation support — with activities, deliverables and duration per phase, plus governance, cadence and success metrics. Use this to plan how you will deliver; for a one-page formal alignment document use the Project Charter Writer. Fill in your details below.

Project Charter Writer

Get a project charter that aligns everyone before work starts — objectives, in and out of scope, stakeholders and roles, deliverables, milestones, success criteria, and risks and assumptions. Use this for formal sign-off; for the delivery-level plan use the Engagement Plan Builder. Fill in your details below.

Delivery Methodology Designer

Design a repeatable delivery methodology — phases with objectives, activities and quality gates, the artifacts and templates produced at each stage, and the roles involved. Use this to standardise how your team delivers every engagement so quality does not depend on who runs it. Fill in your details below.

Status Report Generator

Turn your project updates into a clean, client-ready status report — overall RAG status, accomplishments, work in progress, what is upcoming, risks and issues, and decisions needed from the client. Fill in your details below.

Stakeholder Management Plan

Get a stakeholder management plan — a map of each stakeholder by influence, interest and stance (champion, neutral, skeptic), an engagement strategy for each, a communication plan, and the risk stakeholders to watch. Fill in your details below.

Project Risk Register

Get a project risk register — each risk with likelihood, impact, an overall rating, a mitigation and an owner, plus the top risks to watch. Use this to anticipate and manage delivery risks throughout the engagement. Fill in your details below.

Change Management Plan

Get a change management plan to help the client actually adopt your recommendations — the case for change, stakeholder and communication approach, training, reinforcement, resistance management and adoption metrics. Fill in your details below.

Deliverable Quality Review

Get a quality-review checklist to pressure-test a deliverable before it reaches the client — accuracy, insight, structure, clarity, evidence, actionability and formatting — plus common issues to catch and a final-polish list. Fill in your details below.

Project Closure & Handover

Get a project closure and handover process — a closure checklist (handover, sign-off, invoicing, knowledge transfer, feedback, testimonial), lessons learned to capture for the firm, and follow-on opportunities to grow the account. Fill in your details below.

Contracts & Agreements

Master Services Agreement (MSA)

Draft a Master Services Agreement — the framework that governs an ongoing client relationship, with individual SOWs sitting under it. Covers scope, fees, IP, confidentiality, liability cap, term and termination, non-solicit and dispute resolution. For a single fixed project use the Service Agreement instead. Have it reviewed by a lawyer before signing. Fill in your details below.

NDA Builder

Draft an NDA to protect confidential information before or during an engagement — definition of confidential information, permitted use, exclusions, term, return or destruction, and remedies. Choose mutual or one-way. Have it reviewed by a lawyer before signing. Fill in your details below.

Service Agreement Draft

Draft a service agreement for a single, fixed-scope project — scope and deliverables, fees and payment schedule, timeline, IP, confidentiality, warranties, liability and termination. For an ongoing relationship governed by SOWs use the Master Services Agreement instead. Have it reviewed by a lawyer. Fill in your details below.

Retainer Agreement Draft

Draft a retainer agreement for recurring monthly work — the included scope and hours, fee and payment, how extra work is handled, rollover, term and notice, IP and confidentiality. Have it reviewed by a lawyer. Fill in your details below.

Freelancer / Subcontractor Contract

Draft a contract to engage an associate, freelancer or subcontractor — scope, fees, IP assignment to your firm, confidentiality, non-solicit of your clients, independent-contractor status and termination. Ensures client IP flows correctly through to you. Have it reviewed by a lawyer. Fill in your details below.

Standard Terms & Conditions

Draft standard terms and conditions to attach to your proposals and invoices — fees and payment, scope changes, IP, confidentiality, liability cap, warranties, cancellation and jurisdiction. Set these once and reuse for every engagement. Have it reviewed by a lawyer. Fill in your details below.

Client Contract Review

Paste a client contract or MSA and get a risk review — flagged concerns by clause area (payment, liability, IP, indemnity, termination, non-compete), red flags, and negotiation points. This is a review, not legal advice; have a lawyer review before you sign. To draft your own agreement instead, use the Service Agreement or MSA tools. Fill in your details below.

Non-Solicit & Confidentiality Clauses

Draft non-solicitation, confidentiality and non-circumvention clauses for a consulting relationship — protecting your clients and team — with a note on what is actually enforceable in India (post-employment non-compete generally is not). Have them reviewed by a lawyer. Fill in your details below.

Data Processing Agreement (DPA)

Draft a DPDPA-aligned Data Processing Agreement for when you handle personal data on a client behalf — roles, purpose and scope, security measures, sub-processors, breach notification, data return or deletion, and audit rights. Align to the DPDP Act and have it reviewed. Fill in your details below.

Practice & Firm Operations

Consulting Practice Setup Guide

Get a step-by-step guide to set up a consulting firm or agency in India — entity and registrations, positioning and services, pricing, brand and website, tools, and how to land your first clients. Fill in your details below.

Firm Operations SOP

Get operations SOPs to standardise how the firm runs — step-by-step processes for sales, delivery, resourcing, invoicing and reporting, with tools, owners and a review cadence. Fill in your details below.

Resource Allocation Planner

Get a resource allocation plan that puts the right people on the right work — a per-consultant allocation across projects with skill-fit, over-allocation conflicts, and rebalancing suggestions. Fill in your details below.

Knowledge Management System

Get a design for a knowledge management system so your firm reuses its best work and IP — a structure for templates, methodologies, case studies and research, a capture process after each project, reuse habits, and tool options. Fill in your details below.

Quality Assurance Framework

Get a quality assurance framework for consistent quality across engagements — quality standards, review gates and peer review, client-feedback loops, corrective action, checkpoints at key deliverables, and quality metrics. Fill in your details below.

Firm Tools & Tech Stack Advisor

Get a recommended tools and tech stack to run the firm — what to look for in CRM, project management, time and billing, collaboration, accounting and proposal tools, how they integrate, and lean-vs-full budget tiers. Fill in your details below.

Firm Health Audit

Get a firm health audit that diagnoses what is holding the firm back — checks and gaps across sales and pipeline, delivery and quality, utilisation and margin, people, and systems, plus a scorecard and priority fixes. Fill in your details below.

Finance & Pricing

Pricing Strategy Advisor

Get pricing-strategy advice to move from hourly to higher-value pricing — a comparison of pricing models (hourly, fixed, retainer, value-based, outcome-based) with when to use each, advice on transitioning, and how to package and productise your offerings. Fill in your details below.

Rate Card Builder

Get a clear, defensible rate card — hourly or daily rates by role and experience level, the logic behind them (cost, market, value), and how to handle volume and retainer discounts. Fill in your details below.

Consulting Firm P&L Builder

Get a structured profit and loss for the firm — revenue and cost lines with percentages, key ratios (salary-to-revenue, gross and net margin), and insights on where money leaks. Fill in your details below.

Cash Flow & Collections Planner

Get a cash flow and collections plan to stay cash-positive despite slow payers — inflows from retainers and milestones vs outflows, a collections approach, and levers to pull (advances, faster invoicing, retainers). Fill in your details below.

Firm Business Case / Loan Note

Get a business case to fund growth, hiring or investment — executive summary, the investment breakdown, projected financials (revenue, margin, payback, ROI), the funding ask, and risks with mitigations. Fill in your details below.

Consulting Services GST Guide

Get a plain-English GST guide for a consulting or professional-services business — GST on services and retainers, the export-of-services zero-rating and LUT conditions, reverse charge on imported services, and which returns to file. Confirm specifics with a tax professional. Fill in your details below.

Consulting KPI Dashboard

Get a practical KPI dashboard for the firm — the metrics that actually run a consulting business (utilisation, realisation, pipeline, win rate, revenue per consultant, retention, project margin, DSO) with formulas, why each matters, and a review cadence. Fill in your details below.

Invoicing & Collections SOP

Get an invoicing and collections SOP to bill on time and get paid faster — billing triggers and GST-compliant invoicing, a reminder and escalation cadence, dispute handling, and levers to reduce your days-sales-outstanding. Fill in your details below.

Client Management & CX

Client Onboarding Kit

Get a client onboarding kit to start engagements on the right foot — a step-by-step onboarding flow (welcome, kickoff, access and info, expectations, communication plan, first win), a kickoff agenda, and an information checklist of what to collect. Fill in your details below.

Client Relationship Plan

Get a client relationship plan to nurture a key account for retention and growth — key contacts and cadence, how you deliver ongoing value, executive touchpoints, health signals to watch, and growth moves (cross-sell, upsell, referrals). Fill in your details below.

Client Feedback & NPS Survey

Get a client feedback and NPS survey — a 0-10 recommend question, rating questions across value, delivery, communication and expertise, open questions, and an action plan by segment (promoters, passives, detractors). Fill in your details below.

Account Growth Planner

Get an account growth plan to grow revenue from an existing client — whitespace mapping, cross-sell and upsell opportunities, new stakeholders to reach, an expansion path, and a value-led (not pushy) approach. Fill in your details below.

Quarterly Business Review (QBR) Kit

Get a Quarterly Business Review kit to show value and set up renewals — a QBR structure (results and value, KPIs, learnings, roadmap, asks), value framing tied to client goals and ROI, and how to set up the renewal. Fill in your details below.

Escalation & Difficult Client Playbook

Get an escalation and difficult-client playbook to handle unhappy clients and save accounts — a recovery process (listen, acknowledge, diagnose, plan, recover, follow up), scenario-specific approaches, and ready-to-use response scripts. Fill in your details below.

Testimonial & Referral Request

Get testimonial and referral request templates to turn happy clients into proof and pipeline — a testimonial-request email with prompt questions, a referral-request email with specific asks, and the best moments to ask. Personalise before sending. Fill in your details below.

Renewal & Retention Playbook

Get a renewal and retention playbook to renew retainers before they lapse — a value review, when and how to open the renewal conversation, options and pricing, objection handling, churn warning signs, and a win-back approach if they leave. Fill in your details below.

Marketing & Thought Leadership

Consulting Marketing Plan

Get a marketing plan to generate a steady pipeline — positioning, a content and channel mix (LinkedIn, content, webinars, referrals, SEO), a lead engine that flows to sales, and a monthly cadence. Fill in your details below.

Content Strategy Builder

Get a content strategy that builds authority and leads — content pillars tied to your expertise and client problems, formats (articles, posts, video, whitepapers, newsletters), a calendar, and distribution. Fill in your details below.

LinkedIn Content Planner

Get a LinkedIn content plan to attract clients — content pillars, a day-by-day post plan with hooks, post copy and CTAs, and engagement tips. Fill in your details below.

Whitepaper / Report Writer

Get a whitepaper or report outline that builds credibility — title, executive summary, a section-by-section structure with key points, what data and evidence to include, and a call to action. Add your own research and verify claims. Fill in your details below.

Webinar / Event Plan

Get a lead-generating webinar or event plan — topic and hook, agenda, a promotion plan and timeline, registration and follow-up, and how to convert attendees into leads. Fill in your details below.

Newsletter Builder

Get a newsletter structure and a sample edition to stay top of mind with prospects — a section format (insight, tip, case, resource, CTA), a sample edition, a cadence, and list-building ideas. Follow consent and email rules. Fill in your details below.

SEO Content Planner

Get an SEO content plan to rank for what your clients search — keyword themes around your services and their problems, a content plan with intent and key points per page, and on-page basics. Validate keywords with a research tool. Fill in your details below.

Referral Program Designer

Get a referral program design to turn clients and partners into a channel — the referral mechanic (who refers, incentive or reciprocity, the ask process), partner referrals from complementary firms, and materials to make referring easy. Keep incentives ethical and disclosed. Fill in your details below.

Personal Branding Plan

Get a personal branding plan to become the go-to expert in your niche — positioning and niche, a content and speaking plan, network building, proof to showcase, and a consistent rhythm and voice. Be authentic and consistent. Fill in your details below.

HR & Talent

Consulting Hiring Kit

Get a hiring kit for a consulting role — a full job description with responsibilities, requirements and a salary-range hint, where to hire, an interview process (case, competency, culture), and a practical assessment. Comply with fair hiring practices. Fill in your details below.

Consultant Onboarding Program

Get a consultant onboarding program to make new hires billable fast — a week-by-week plan (firm and tools, methodology, shadowing, first project), a buddy and mentor structure, and ramp metrics like time-to-billable. Fill in your details below.

Competency & Career Framework

Get a competency and career framework — levels from analyst to partner with the competencies and expectations at each, promotion criteria, and how people develop. Fill in your details below.

Performance Review Kit

Get a performance review kit — a review framework (delivery, client impact, business development, teamwork, growth), a rating scale, self and manager templates, and a development plan. Apply it fairly and consistently. Fill in your details below.

Team Training & L&D Plan

Get a training and L&D plan to build skills and consistency — training modules (methodology, domain, client skills, tools, leadership) with audience and format, delivery methods, and how to track skill growth. Fill in your details below.

Incentive & Compensation Designer

Get an incentive and variable-compensation design — a fixed-variable mix, incentive drivers (utilisation, business development, client satisfaction, margin), payout slabs and timing, and quality and ethics guardrails. Communicate it clearly. Fill in your details below.

Utilisation & Timesheet Policy

Get a utilisation and timesheet policy to track time and protect margin — what to log (billable vs non-billable), utilisation targets by role, a submission-approval-review process, and why it matters for margin and pricing. Fill in your details below.

Remote & Hybrid Work Policy

Get a remote and hybrid work policy for a consulting team — eligibility and expectations, working hours and availability, collaboration and tools, data security, and client-site norms. Fill in your details below.

Leave & Attendance Policy

Get a leave and attendance policy for a professional firm — full policy text, leave types with entitlements and rules, and hybrid attendance expectations, aligned to Shops and Establishment norms. Align to your state rules and review. Fill in your details below.

CA / CS / Professional Firm

CA / CS Firm Setup Guide

Get a setup guide for a CA, CS or CMA professional practice — registration and Certificate of Practice, firm name and structure, a services menu, systems, first clients, and the institute norms on practice and advertising. Follow your institute regulations on practice and solicitation. Fill in your details below.

Engagement Letter Builder

Get a professional engagement letter — scope of services, client and professional responsibilities, fees and billing, confidentiality, limitations (reliance on client information), and period and termination. Align to your institute standards and have it reviewed. Fill in your details below.

Professional Services Catalogue

Get a professional services catalogue — your services grouped by category (audit and assurance, direct tax, GST, ROC and secretarial, advisory) with typical deliverables, and how to bundle them for SMEs. Align to your competencies and institute norms. Fill in your details below.

Client Compliance Calendar Service

Get a client compliance calendar you can offer as a service — obligations (GST, TDS, advance tax, PF and ESI, ROC, income tax return) with frequency and typical due timing, and how to deliver it as a retainer. Confirm exact due dates for each client. Fill in your details below.

Client Data Request Checklist

Get a client data and document request checklist so you collect what you need first time — documents grouped by service (income tax, GST, audit, ROC), a secure collection process, and privacy handling per DPDPA and confidentiality. Fill in your details below.

Professional Fee Quotation

Get a professional fee quotation — services with scope and fee, a total, payment terms, validity, and what is out of scope. Follow institute norms on fees and solicitation. Fill in your details below.

Professional Conduct & Ethics Guide

Get a professional conduct and ethics guide for your practice — advertising and solicitation limits, professional independence, confidentiality, fees and quality, what marketing is permitted, and how to manage conflicts and independence. Follow your institute code and take professional advice. Fill in your details below.

Practice Management System

Get a practice management system design to run a professional firm efficiently — client and job tracking, compliance deadlines, document management, billing, and staff allocation, plus the job lifecycle from data to filing and tool awareness. Fill in your details below.

Retainer Agreement (Professional)

Get a professional-services retainer agreement for recurring compliance work — scope of recurring services, fees and billing, client responsibilities and data, confidentiality, limitations and reliance, term and termination, and dispute resolution. Align to institute norms and have it reviewed. Fill in your details below.

Agency Operations

Agency Retainer Structure

Get an agency retainer structure that stays profitable — the included scope and hours, pricing, how overage and extra work are handled, monthly value-proof reporting, and how to avoid over-servicing. Fill in your details below.

Scope Creep Control Kit

Get a scope creep control kit to stop unpaid work eating your margin — prevention (clear SOW, change process, logging), conversation scripts for saying something is out of scope, and a quick change-order process. Use it with clear contracts. Fill in your details below.

Creative Brief Builder

Get a creative brief to brief teams and creators clearly — objective, audience, key message, tone, deliverables, mandatories, and success metrics. Fill in your details below.

Media Plan Builder

Get a paid media plan for a client goal — a channel-by-channel plan (objective, budget share, expected outcome), campaign phasing, and measurement KPIs. Validate with platform data. Fill in your details below.

Client Reporting Template

Get a client reporting template that proves your value — a report structure (summary, results vs goals, channel performance, insights, next steps), value framing that ties metrics to business outcomes, and what to chart. Fill in your details below.

Client Servicing SOP

Get a client servicing SOP for consistent, responsive service — communication cadence and response times, meeting rhythm, escalation, documentation, account roles, and how to be proactive. Fill in your details below.

Project Effort Estimator

Get a bottom-up project effort estimate so you price right — a workstream-by-workstream breakdown with tasks, hours and roles, total hours, a contingency buffer, and how effort links to price. Validate with your team. Fill in your details below.

Agency Pricing Model

Get an agency pricing model — pricing approaches (project, retainer, performance, hybrid) with when to use each and margin notes, your cost base (team cost, overhead, target margin), and productised offers. Validate against your cost and market. Fill in your details below.

Portfolio & Case Study Kit

Get a portfolio and case study kit to showcase work that wins clients — a portfolio structure (best work, categories, results, before-after), a case-study format (challenge, approach, result), and presentation options. Use real work and get consent. Fill in your details below.

Risk, Ethics & Compliance

Confidentiality Policy

Get a firm-wide confidentiality policy — full policy text, scope (client info, data, work product), handling rules (access, sharing, storage, disposal), and employee obligations. Align to your contracts and DPDPA. Fill in your details below.

Conflict of Interest Policy

Get a conflict of interest policy — full policy text, how to identify when conflicts arise, how to manage them (disclosure, information walls, declining, consent), and a COI register. Adapt to your services and take professional advice. Fill in your details below.

Professional Ethics Code

Get a professional ethics and conduct code for the firm — principles (integrity, objectivity, confidentiality, competence, professional behaviour), conduct standards, and how to raise concerns. Fill in your details below.

Data Privacy Policy

Get a DPDPA-aligned data privacy policy — full policy text, data collected (client, employee, prospect), purpose and consent, security and retention, and data-subject rights (access, correction, deletion). Align to the DPDP Act and have it reviewed. Fill in your details below.

IP Ownership & Usage Policy

Get an IP ownership and usage policy — who owns client deliverables (on payment), firm IP retained (methods, templates, tools), third-party licensed assets, and your right to showcase work in your portfolio. Align to your contracts and have it reviewed. Fill in your details below.

Liability & Risk Management

Get guidance to limit your professional liability — liability caps, disclaimers, scope limits and reliance clauses, balanced contract protections (indemnity, cap tied to fees), operational safeguards (quality, documentation, sign-offs), and professional-indemnity awareness. Take legal and insurance advice. Fill in your details below.

Professional Indemnity Insurance Guide

Get a professional indemnity insurance guide — cover types (professional indemnity, cyber, general liability), what to check (sum insured, scope, exclusions, retroactive cover), and when you need it. This is guidance, not insurance advice; compare policies and read wordings. Fill in your details below.

Independence & Objectivity Policy

Get an independence and objectivity policy to keep advice credible — principles (objective advice, disclose interests), safeguards (no undisclosed commissions, managing referrals), and disclosure rules. Adapt to your services and professional norms. Fill in your details below.

Growth & Scaling

Firm Growth Strategy

Get a growth strategy for the practice — growth levers (niche focus, pricing, productisation, partnerships, hiring, marketing), a lever-by-lever plan with actions and impact, and a phased roadmap. Fill in your details below.

Productised Service Designer

Get a productised service design — turn a custom service into a fixed-scope product with a name, fixed scope, deliverables, price, a repeatable delivery process, and target customer. Validate demand and margin. Fill in your details below.

Partnership & Alliance Strategy

Get a partnership and alliance strategy to grow through partners and referrals — partner types (complementary firms, tech vendors, referral partners), partnership models (referral, white-label, co-delivery), and how to identify, pitch, structure and manage them. Formalise partnerships in writing. Fill in your details below.

Niche & Positioning Strategy

Get a niche and positioning strategy to own a niche and command premium fees — niche options, a chosen positioning, messaging, and the proof you need. Validate demand in the niche. Fill in your details below.

Scaling Roadmap

Get a scaling roadmap to grow from solo to a team-based firm — phases (solo, first hires, team, firm) with focus, systems to build, and risks at each, plus what to delegate first. Pace it to cash flow and demand. Fill in your details below.

Associate / Subcontracting Model

Get an associate or subcontracting delivery model to scale delivery with associates — how associates are engaged, the economics (rates, margin), quality standards and review, and IP and confidentiality protection. Use clear contracts. Fill in your details below.

Global Clients Expansion Guide

Get a guide to win and serve overseas clients — target markets, positioning, pricing in forex, delivery across time zones, the commercials (export of services, GST zero-rating, forex, contracts), and trust-building. Confirm tax and forex rules for export of services. Fill in your details below.

Exit & Succession Planning

Get an exit and succession plan outline — options (sale, merger, internal succession, partnership), value drivers (recurring revenue, systems, brand, client concentration), how to prepare (reduce founder dependence, document, build team), and the process (valuation, buyers, deal). Take professional M&A, legal and tax advice. Fill in your details below.

> This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.
