

AI-Assisted Consulting Discovery

How AI agents compress weeks of discovery into hours
without losing depth or quality



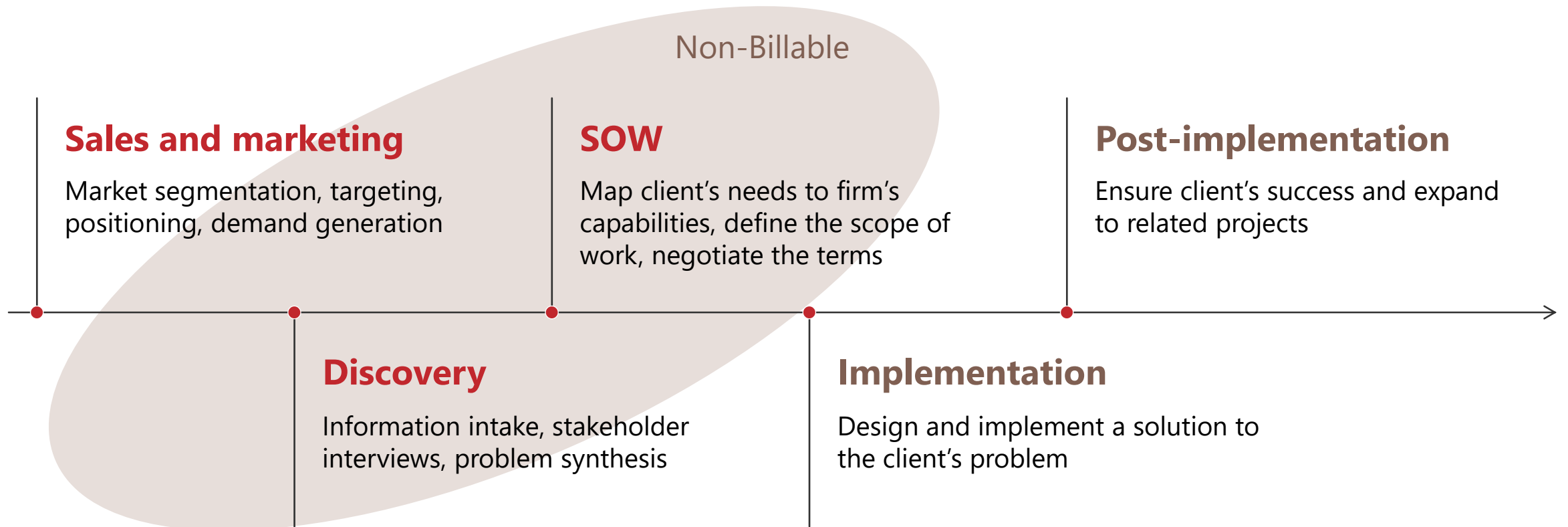
AGENDA

1. Why discovery is the best place to start with AI
2. Define AI agents and agentic workflows
3. RouteFlow – a client in need of advice and guidance
4. Demos
 1. External research agent
 2. Stakeholder interview agent
 3. Cross-sectional analysis agent
5. Reuse and scale with workspace templates
6. Q&A and next steps

THE **THREE PILLARS** OF AI IN PROFESSIONAL SERVICES



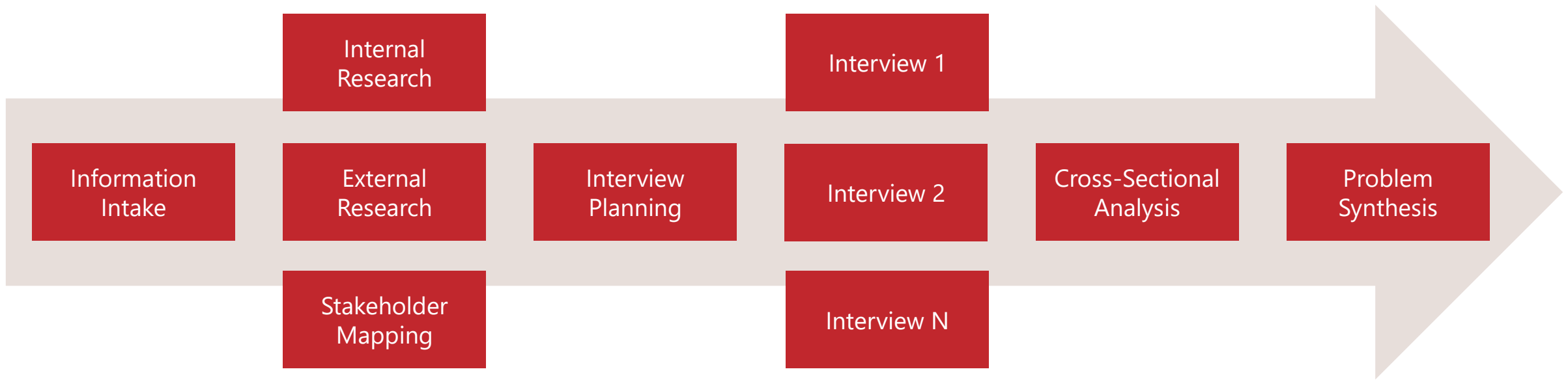
USING AI TO ACCELERATE AND AUTOMATE NON-BILLABLE WORK IMPROVES **MARGINS** AND **QUALITY**



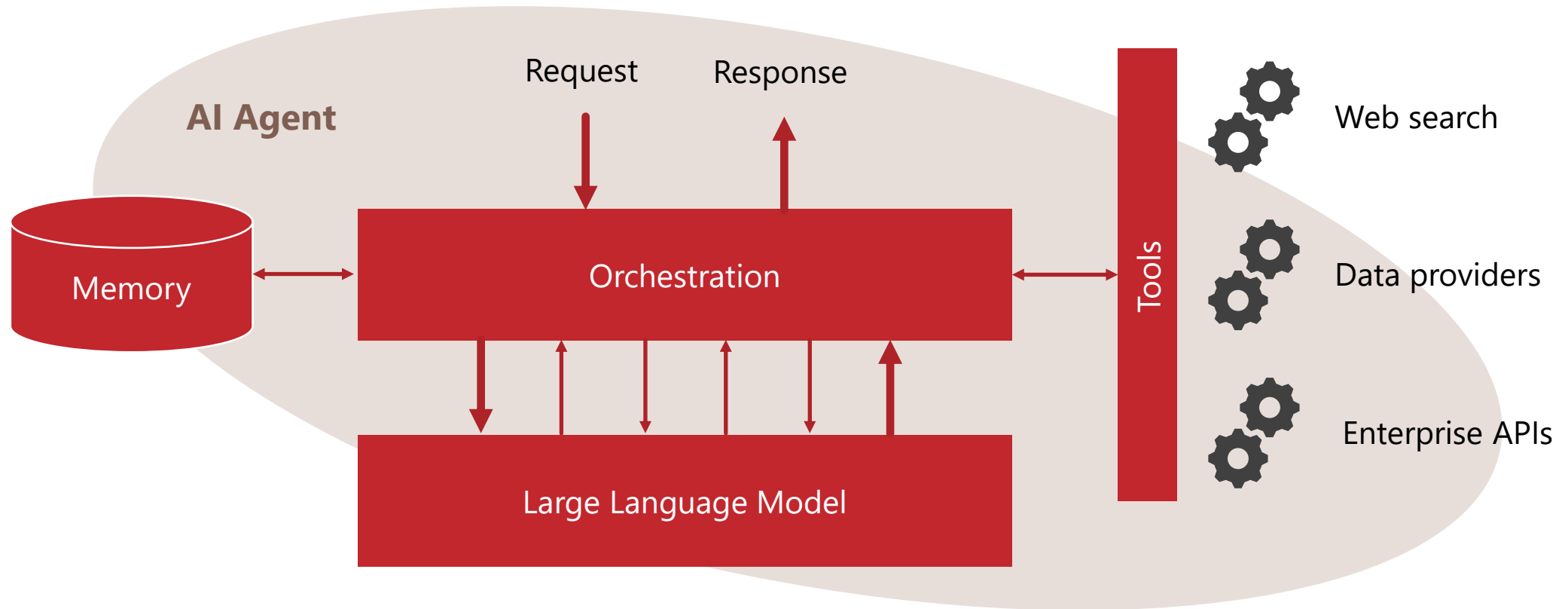
NON-BILLABLE WORK SIGNIFICANTLY IMPACTS PROFITABILITY



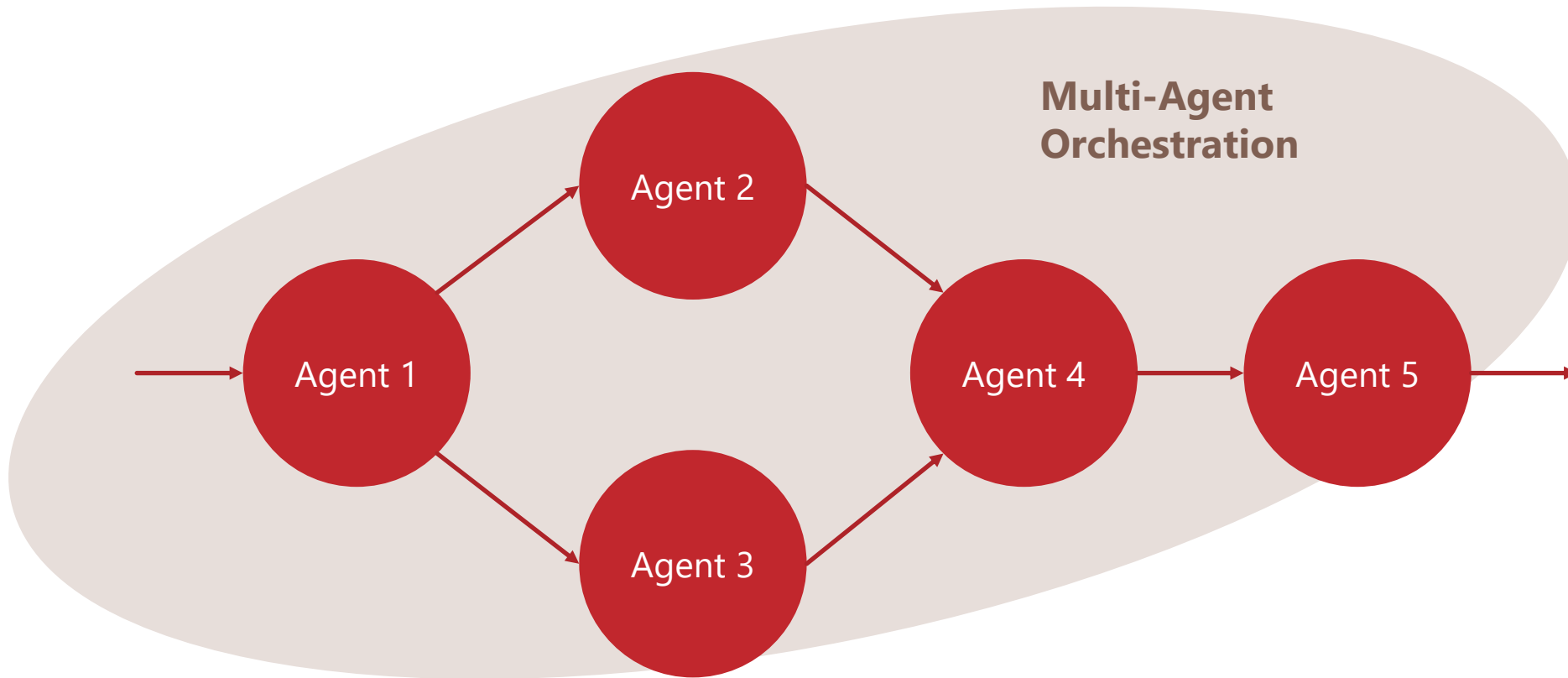
CONSULTING DISCOVERY WORKFLOW HAS MANY OPPORTUNITIES FOR AI AUTOMATION



AI AGENTS PERFORM COMPLEX TASKS BY ORCHESTRATING LARGE LANGUAGE MODELS AND TOOLS

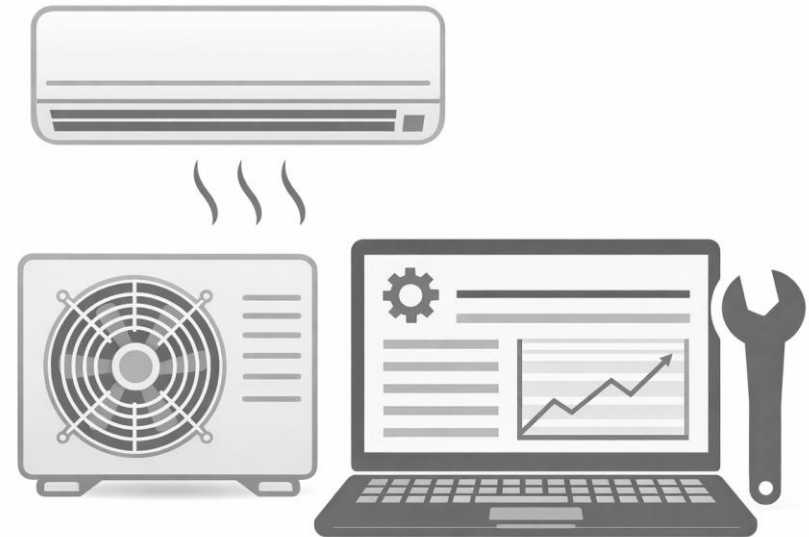


MULTIPLE AGENTS CAN COLLABORATE TO PERFORM COMPLEX TASKS AS PART OF AN **AGENTIC WORKFLOW**

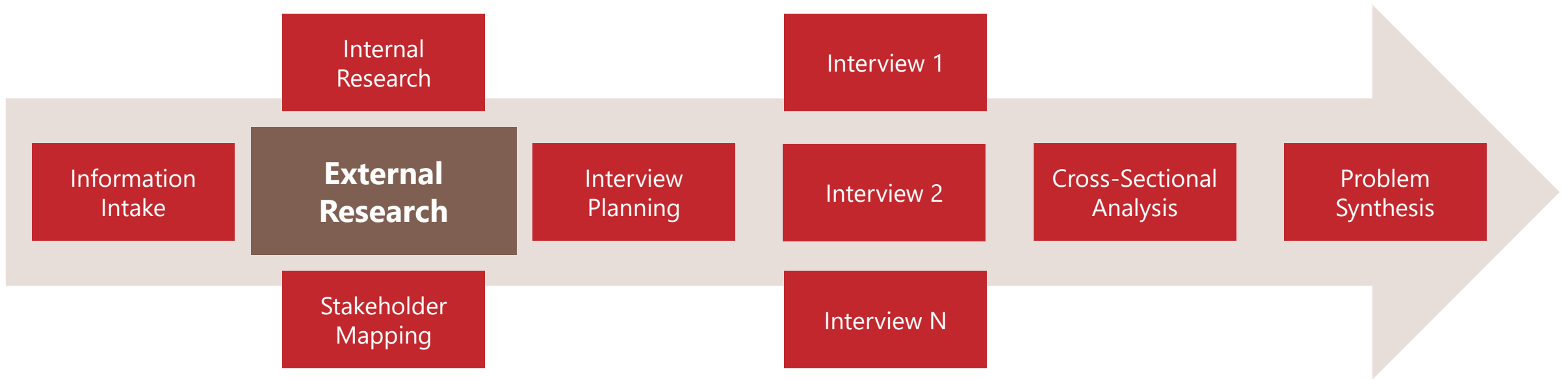


ROUTEFLOW: PE-BACKED SAAS COMPANY SERVING HVAC, PLUMBING, AND ELECTRICAL CONTRACTORS

- Grew to \$60M ARR, but growth is now slowing
- Churn is rising and win rates are falling
- New AI-enabled competitors are changing buyer expectations
- Leadership disagrees on the root cause:
 - Sales: weak positioning
 - Product: wrong customer focus
 - Customer Success: poor onboarding and adoption
 - Finance: worsening unit economics
- CEO must decide what problem to solve first and where consultants can help



DEMO: AUTOMATING EXTERNAL RESEARCH

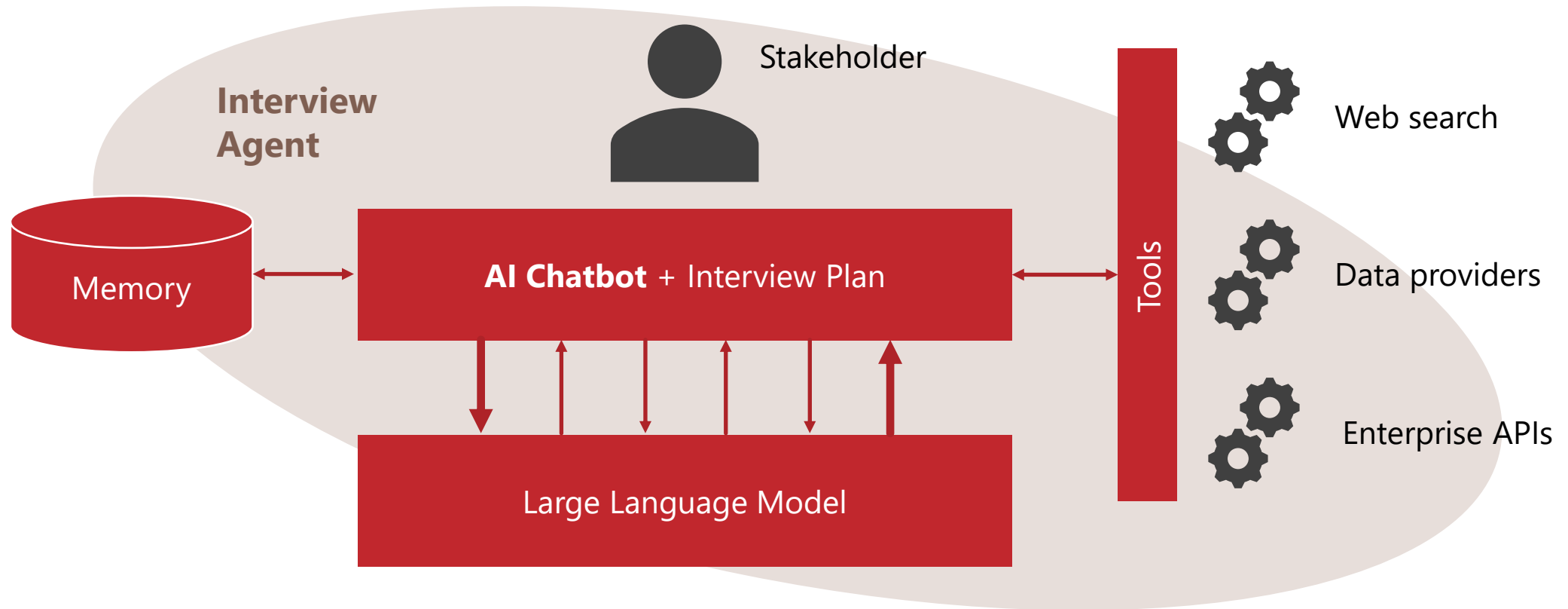


PERSPECTIVES FROM MANY ROUTEFLOW STAKEHOLDERS ARE REQUIRED TO UNDERSTAND THE PROBLEM

Leadership	Go-To-Market	Product & Delivery	Customers	Investors
CEO	Sales	Product	Existing customers	PE sponsor
CFO	Marketing	Implementations	At-risk customers	Board
COO	RevOps	Customer Success	Churned customers	Operating partner
	Partnerships	Engineering	Lost prospects	

Total: 18 stakeholders (at least)

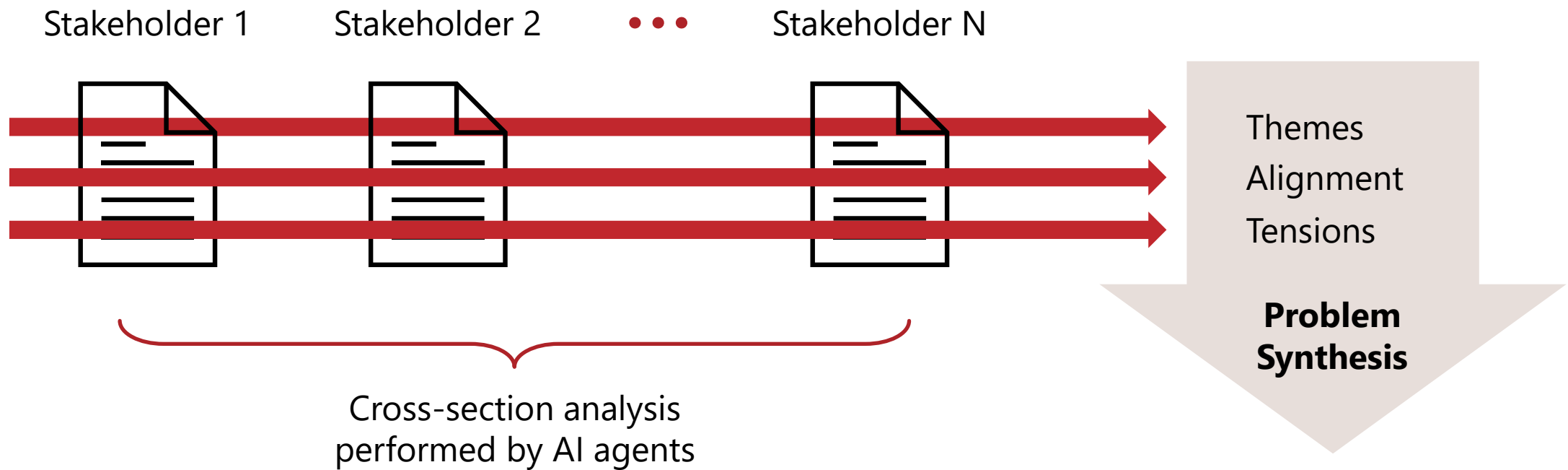
AI AGENTS CAN CONDUCT PERSONALIZED AND DYNAMIC STAKEHOLDER INTERVIEWS



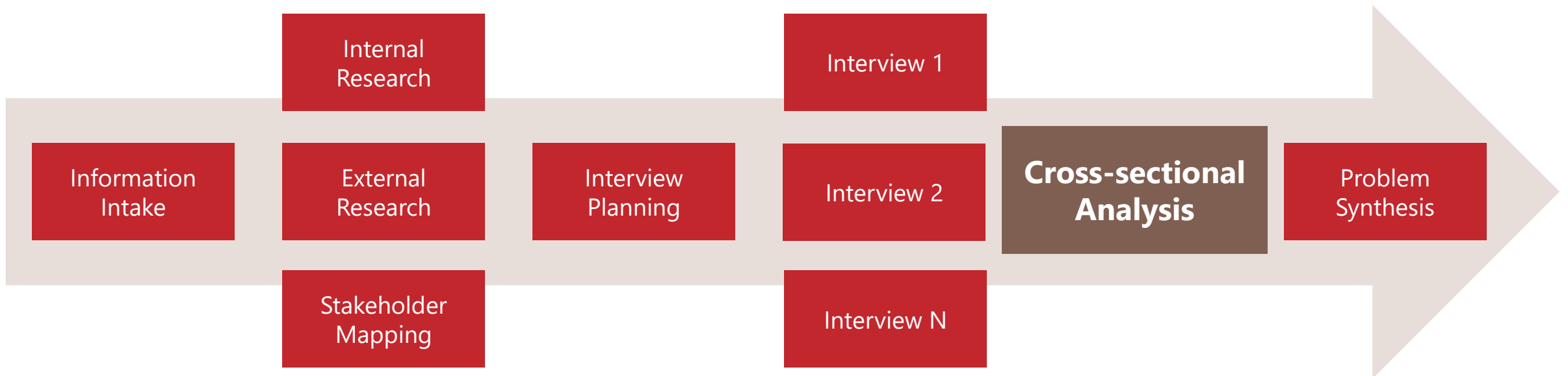
DEMO: AUTOMATING STAKEHOLDER INTERVIEWS



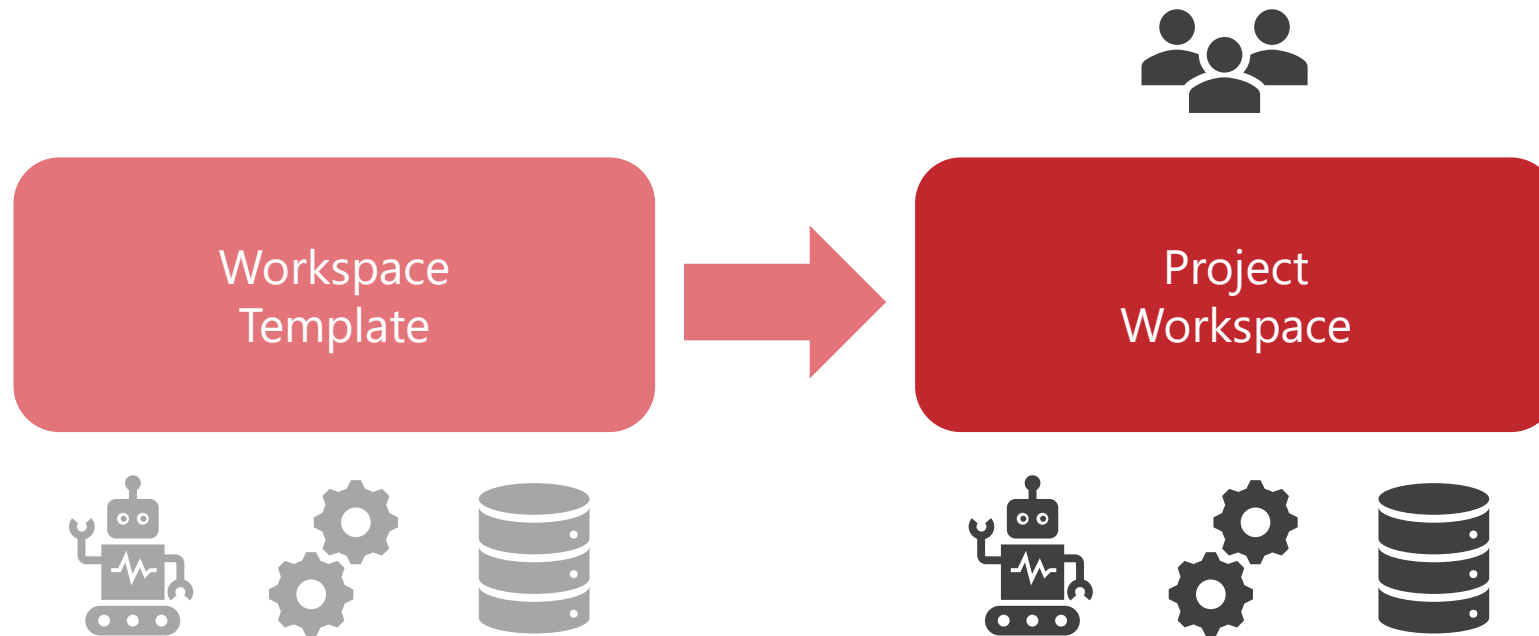
AI AGENTS EXTRACT FACTS AND INSIGHTS FROM STAKEHOLDER INTERVIEWS TO INFORM PROBLEM SYNTHESIS



DEMO: AUTOMATING CROSS-SECTIONAL ANALYSIS



AGENTS, DATA, CONTENT, AND TOOLS CAN BE SAVED AS A TEMPLATE AND REUSED ACROSS PROJECTS





AI AGENTS CAN TURN NON-BILLABLE CONSULTING WORK INTO A FASTER, HIGHER-MARGIN SOURCE OF COMPETITIVE ADVANTAGE

- **Reduce effort** on research, interviews, and synthesis
- **Speed up discovery** and proposal development
- **Improve consistency** across teams and engagements
- **Scale best practices** through repeatable agent workflows
- **Shift consultant time** toward client-facing, higher-value work



NEXT STEP: REACH OUT TO GET A COPY OF OUR
DISCOVERY WORKSPACE TEMPLATE

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