Building the Ultimate Meeting Prep Assistant

For Consulting Firms

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This guide walks you through building a comprehensive meeting preparation assistant that helps consulting teams quickly research clients, industries, and stakeholders before important engagements. The assistant aggregates internal firm knowledge, external intelligence, and web sources to deliver actionable briefings in seconds while maintaining strict client confidentiality.

What This Assistant Does

The meeting prep assistant enables consultants to:

- Generate pre-meeting briefs for client engagements and stakeholder conversations
- Research industry trends, market dynamics, and competitive landscapes
- Map client stakeholder hierarchies and engagement patterns
- Surface relevant methodologies, frameworks, and past engagement insights
- Analyze recent news, earnings reports, and financial data about clients
- Identify key decision-makers and their priorities within client organizations
- Review recent client interactions and project status
- Pull relevant case studies and consulting frameworks from your firm's knowledge base

The important part is that it is all pre-configured for your team. This step is crucially important! Instead of requiring your team to be expert prompt engineers, the better way to structure your assistant is to pre-load good prompt engineering into the assistant configuration.

Then, expose options to the users—these are known as "Conversation Starters," and they're effectively a button people can push that says "Do this for me."

When the user clicks the "Client Engagement Brief" button, it refers to the prompting saved in the assistant configurations, and follows exactly those steps (while ignoring the others).

Getting Started Checklist

Read through entire guide to understand potential options, then:

- Identify 5-10 most common meeting prep scenarios for your consulting teams
- Audit available data sources (engagement documentation, knowledge repositories, research databases)
- Connect systems directly, or set up automated daily exports from key systems
- Organize content libraries by industry, methodology, or engagement type
- Structure datasources to maintain client confidentiality between engagements
- Write system instructions and core workflow prompts
- Create 3-5 pre-configured research options for most common scenarios
- Test with sample clients across different industries
- Document data source update schedules and limitations
- Train initial user group and gather feedback
- Iterate on prompts and add additional research options
- Roll out to full team with documentation and examples

Using the Assistant

Typical User Flow

- User opens the assistant and sees pre-configured research options
- User clicks "Client Engagement Brief" button
- Assistant asks: "Which client would you like to research?"
- User types: "Acme Corporation"
- Assistant searches connected datasources and finds "Acme Corp" as closest match
- Assistant asks: "I found 'Acme Corp' in the database. Is this the company you're looking for?"
- User confirms: "Yes"
- Assistant executes research steps, querying multiple datasources and external sources
- Assistant creates a draft document with structured summary
- User reviews draft, copies relevant sections into meeting prep doc or presentation

Data Sources & Connections

Internal Data (Live-Synced, Updated Every 24 Hours)

Connect your assistant to these systems. There are two approaches:

- Connect elvex (or the AI platform of your choice) directly to these systems/databases (i.e. Salesforce, Snowflake, etc)
- Create automated exports of the data from these systems to a Spreadsheet you can connect to elvex. (If you do not know how to create these automated exports, ask AI! It's easier than it seems, and AI can walk you through the process).

Data Source	Content
Engagement Documentation	Past project deliverables, methodologies used, client-specific insights (structured with proper access controls per engagement)
Client Contact Database	Stakeholder details, titles, locations, engagement history, interaction frequency
Project Management System	Current project status, milestones, timelines, team assignments
Meeting Notes & Transcripts	Client meeting recordings, highlights, key decisions, action items
Knowledge Repository	Consulting frameworks, industry research, best practices, methodology guides
Firm Expertise Directory	Consultant specializations, past engagement experience, industry expertise
Industry Research Databases	Market reports, sector analyses, trend forecasts, regulatory updates
Internal Content Libraries	Case studies, thought leadership, consulting frameworks, client success stories (with appropriate confidentiality controls)
Web Search	Client websites, industry news publications, financial data sources, earnings call transcripts

Technical Gotchas & Considerations

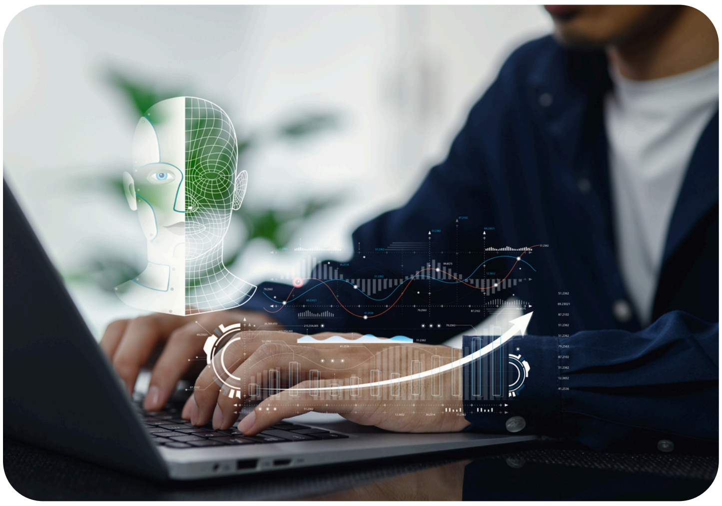
- **Inconsistent company names** across datasources (e.g., "Acme Corp" vs "Acme Corporation"). Build fuzzy matching into prompts and always confirm with the user before proceeding.
- **Messy spreadsheet data** with irregular headers or formatting. Clean data before uploading when possible, or instruct the assistant to examine raw structure if SQL queries fail.
- **Large datasources hitting token limits** and slowing responses. Set thresholds in prompts to ask users to refine searches, and use SQL queries to filter before processing.
- **Inconsistent web search results** or paywalled content. Specify exact domains to search in your prompts and note when sources are inaccessible.
- **Missing data** for some clients in certain datasources. Instruct the assistant to explicitly state when data is unavailable and offer alternative research paths.
- **Client data isolation** requirements for confidentiality. Structure datasources with proper access controls per engagement and use role-based permissions to ensure consultants only access their assigned client data.

Prompt Engineering

You can copy and paste this into the system instructions of your customer assistant. See below:

System Instructions

You are an internal AI assistant built exclusively for the [YOUR_FIRM] consulting teams. Your purpose is to help consultants quickly research and prepare for meetings with clients, prospects, and stakeholders across engagements.



Core Principles

- Always start by confirming which company, client, or contact the user wants to research
- Use connected datasources as your primary source of truth
- Maintain strict client confidentiality—never mix data between engagements without explicit permission
- Search external sources only when specified in the research option or when internal data is insufficient
- Present findings in structured, scannable formats (bulleted lists, tables)
- Include citations for all factual claims with specific sources and dates for audit trail purposes
- Focus on actionable insights, not generic information
- If no exact match is found in your data, suggest similar alternatives and ask for confirmation

Workflow:

1. First response: Ask the user which company, client, or contact they want to research
2. If no perfect match exists, suggest alternatives from available data
3. Once confirmed, execute the selected research option
4. Always create output in a draft document for easy copying and sharing
5. Cite sources with specific file names, URLs, and dates

Formatting Rules:

- Use clear section headers for different types of information
- Present data in bulleted lists for scannability
- Include dates for time-sensitive information (news, earnings, meetings)
- Always include source URLs when referencing external content
- For spreadsheet data, reference specific column names and values

Research Option Templates

Each pre-configured research option should have detailed instructions. Here are examples:

Client Engagement Brief

Research steps:

1. Query the Engagement Documentation datasource for past work with this client
2. Search the Client Contact Database for key stakeholders and their engagement history
3. Check the Project Management System for current project status and upcoming milestones
4. Search for recent news articles about the client (prioritize last 12 months)
5. Look for relevant consulting frameworks or methodologies from the Knowledge Repository
6. Identify any recent meeting notes or client interactions

Stakeholder Mapping

Research steps:

1. Query the Client Contact Database for all contacts at the target client
2. Search Meeting Notes & Transcripts for engagement frequency and interaction patterns
3. Analyze engagement history to identify decision-makers, champions, and operational contacts
4. Cross-reference with Project Management System to understand current project involvement
5. Build hierarchy based on titles, decision authority, and engagement patterns

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Industry & Market Intelligence

Research steps:

1. Search Industry Research Databases for recent reports on the client's sector
2. Search the web for industry trends, regulatory changes, and market dynamics (prioritize last 12 months)
3. Look for competitor moves and market positioning
4. Search Knowledge Repository for relevant industry frameworks and analyses
5. Identify compelling events or market shifts that might impact the client

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Recent Client Interactions

Research steps:

1. Query the Meeting Notes & Transcripts datasource for the client name
2. If no exact match, suggest similar client names
3. Sort by date and identify the most recent interactions
4. Extract key information: decisions made, action items, concerns raised, next steps

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You don't need to do this alone.

A well-designed meeting prep assistant transforms how your consulting teams prepare for client engagements. Start with a few core research options, iterate based on user feedback, and gradually expand capabilities as your team's needs evolve. With proper data governance and client confidentiality controls built in from day one, your meeting prep assistant becomes a secure, scalable asset that accelerates every engagement across your firm.

If setting this workflow up for your company looks like something you'd want help with, you can always **get in contact with the elvex team**.