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The AI Prompt Pack for Retail Consultants.

Copy-and-paste prompts that help you win work, do the work faster and get your expertise seen, without becoming a tech person.

Works with Claude, ChatGPT, Gemini and Microsoft Copilot.

How to get great answers from AI

AI works like a very fast, very keen new associate. Give it a role, the context and the format you want, and it does good work. Give it one vague line and you get generic filler.

1. Fill in the highlights

Each prompt has **highlighted parts**.
Replace them with your details. The more specific you are, the better the result.

2. Have a conversation

The first answer is a draft. Reply with “shorter”, “more direct”, “sound more like me” or “give me three options”. That back-and-forth is where the quality comes from.

3. Give it your voice

Paste in two or three things you have written (a LinkedIn post, an email, a proposal) and say “write in this style”. It gets noticeably more like you.

4. You stay the expert

AI can be confidently wrong, especially with facts, figures and recent news. Check anything that goes in front of a client. It speeds up your judgement; it does not replace it.

Protect your clients

- Swap real client names for placeholders (“Client A”, “a 40–store fashion retailer”) unless you are using a business account your client has agreed to.
- Check your AI tool’s data settings. Many let you turn off use of your chats for training.
- Never paste in contracts, personal customer data or anything under NDA.

Inside

01	Win the work	Call prep, proposals, pricing options, follow-ups
02	Do the work faster	Store visits, data, competitors, workshops, reports
03	Get your expertise seen	LinkedIn, case studies, talks into content
04	Your own AI assistant	A ten-minute setup that remembers how you work

01 Win the work

1 Discovery call prep

Use 15 minutes before a first call with a prospective client.

You are an experienced retail strategy consultant preparing for a first call. The prospect is [company name], a [type of retailer, size, markets]. Their contact is [role]. From what I know, they may be dealing with [issue, e.g. falling footfall / slow online growth / store team turnover].

Give me: (1) the 5 most likely pressures on a business like this right now, (2) 8 sharp open questions that get them talking about the real problem, (3) 3 ways someone with my expertise in [your speciality] could help, and (4) one smart observation I could open with. Be concise and practical. Flag anything I should verify.

2 Proposal first draft

Turn your call notes into a clear proposal in minutes.

Here are my notes from a discovery call: [paste notes].

Draft a proposal for this client with these sections: The situation (in their words), What success looks like, My approach (3 to 4 phases with outcomes, not activities), Timeline, Investment, Why me. Keep it under 2 pages, plain English, no consultant jargon. Write it to make the client feel understood. Leave the investment as [PRICE] for me to fill in.

3 Three pricing options

Clients like a choice. Options also make your middle price look sensible.

I am a retail consultant pricing a project: [describe the project]. My usual day rate is [£].

Design three options (Essential, Recommended, Complete) that differ in scope and outcomes, not just hours. For each, list what is included, the outcome for the client, the time involved and a suggested price. Make Recommended the obvious best value. Then write a two-sentence explanation I can use to present them.

4 Follow-up that gets a reply

For a proposal or conversation that has gone quiet.

I sent a proposal to [name, role, company] on [date] about [project] and have not heard back. Write 3 short, warm follow-up emails (under 90 words each) for 1 week, 2 weeks and 4 weeks. Each should add something useful (an insight, an idea or a relevant example) rather than just "checking in". No pressure, no guilt.

02 Do the work faster

5 Store visit notes into a client report

Dictate voice notes on your phone as you walk the store, then paste in the transcript.

Below are my rough notes and voice transcript from a store visit to [store/format] : [paste] .

Turn them into a client-ready store review with: Headline summary (3 bullets), What is working, Opportunities (grouped by Customer experience, Visual merchandising, Team and service, Operations), and Top 5 recommended actions ranked by impact and effort. Keep my observations; do not invent any. Mark anything unclear as [CHECK].

6 Make sense of a spreadsheet

Upload an anonymised sales or KPI export (Claude and ChatGPT can read files).

Attached is [describe data, e.g. weekly sales by store and category for 12 months] . Act as a retail analyst.

Tell me: the 5 most important patterns, any stores or categories that are outliers (and possible reasons to explore), and 3 questions this data raises that I should take to the client. Then suggest the 2 charts that would tell this story best in a board pack. Show your working so I can check it.

7 Competitor snapshot

Best with a tool that can search the web. Always check the sources it gives you.

Create a competitor snapshot for [client] against [competitor 1, 2, 3] in [market] . Compare: proposition, price positioning, store and digital experience, loyalty, recent moves (last 12 months) and apparent strengths and weaknesses. Present it as a table, then give 3 “so what” implications for my client. Cite sources for any facts and say clearly where you are unsure.

8 Design a workshop

For leadership away-days, store manager sessions or team training.

Design a [half-day] workshop for [audience, e.g. 12 regional managers] at [retailer type] . The goal is [outcome] . Give me a timed agenda, 3 interactive exercises (with instructions and materials), the key questions to ask, and how we capture actions at the end. Make it energetic: no more than 15 minutes of anyone talking at the room.

9 Board-ready summary

When a long report needs a one-page version for senior leaders.

Here is my full report: [paste] . Write a one-page executive summary for the [CEO / board] . Start with the single most important recommendation, then the case for it in 3 points, the risks of doing nothing, the investment and the first 3 steps. Short sentences, no jargon, confident tone.

03 Get your expertise seen

Most consultants are invisible online, not because they lack expertise but because they lack time. These prompts turn work you have already done into visibility.

10 LinkedIn post from a real insight

Here is something I noticed or learned recently in my work: **[describe it in a few rough sentences]** . Write a LinkedIn post (150 to 220 words) that opens with a sharp first line, tells the story briefly, gives one practical takeaway retailers can use, and ends with a question to start a conversation. No hashtag spam (max 3), no emojis, no "I'm thrilled to share". Give me 3 opening-line options.

11 Case study builder

Interview me to write a case study about a project I did. Ask me one question at a time (about 8 in total) covering: the client's situation, what was at stake, what I did, the results (numbers if possible) and a quote. When we are done, write a 300-word case study in Challenge, Approach, Results format, anonymised as **[e.g. "a UK homewares retailer with 60 stores"]** .

12 One talk, ten pieces of content

Here is the transcript or notes from a talk, panel or podcast I did: **[paste]** . Turn it into: 5 LinkedIn posts, 1 short article (600 words), 3 quotable lines for graphics and 1 email to my contacts. Keep my phrasing where it is strong.

13 Your positioning in one sentence

I am a retail consultant. Here is what I do and who I do it for: **[describe your work, typical clients, results, background]** . Help me write a clear positioning statement in the format "I help [who] to [outcome] by [how]". Give 5 versions from safe to bold, then tell me which you would pick and why. Then write a matching LinkedIn headline and a 3-line bio.

04 Your own AI assistant

Claude (Projects), ChatGPT (Custom GPTs or Projects) and Gemini (Gems) let you save standing instructions and documents, so every conversation already knows who you are and how you work. It takes about ten minutes and is the biggest single upgrade most consultants can make.

14 Build your assistant's instructions

Paste this into a new chat. It interviews you, then writes the instructions you save into your project.

I want to set up a personal AI assistant for my retail consultancy. Interview me, one question at a time, about: my background and speciality, my typical clients, the services I offer and my approach, my tone of voice (I will paste examples), the tasks I want help with most, and things I never want you to do.

Then write a complete set of "custom instructions" (under 600 words) that I can paste into a Claude Project, Custom GPT or Gemini Gem, so that it always works as my expert associate.

15 The weekly hour-back review

Every Friday, find more work to hand over to AI.

Here is roughly how I spent my working week: **[list tasks and rough hours]**. Identify the 3 tasks where AI could save me the most time. For each, explain exactly how I would do it (which tool, what prompt, what I would still need to check) and estimate the hours saved per month.

What to upload to your assistant

- Your CV or bio, and your service descriptions
- Two or three proposals or reports you are proud of (anonymised)
- Examples of your writing, so it learns your voice
- Your frameworks, checklists or methods, in any rough form



WANT THIS SET UP FOR YOU?

The AI Kickstart

A 90-minute one-to-one session. We map your week, find the three tasks AI should take off your plate, and build your personal AI assistant together, trained on your methods and your voice. You leave with it working.

£245

About me

Designer for 30 years across print, branding, web, apps, video, 3D and motion. Designer and builder of the Rarely Heard Voices community app, and creator of the Truth AI platform.

Get in touch

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