AI FOR NON-TECHIES

HARNESSING AI TO *Transform* YOUR PRACTICE

timeline
MONEY FOR LIFE

Today

Strategy
Ideation, Competitor Analysis, Market Research

Marketing
Interactive Personas, Content Creation

Sales
Lead Lists, Sales Calls

HR
Interactive Policies, Recruitment

Client Support
Build Your Own Support Agent

Business Strategy

Use AI as a thinking partner

Letterly

Chatbots

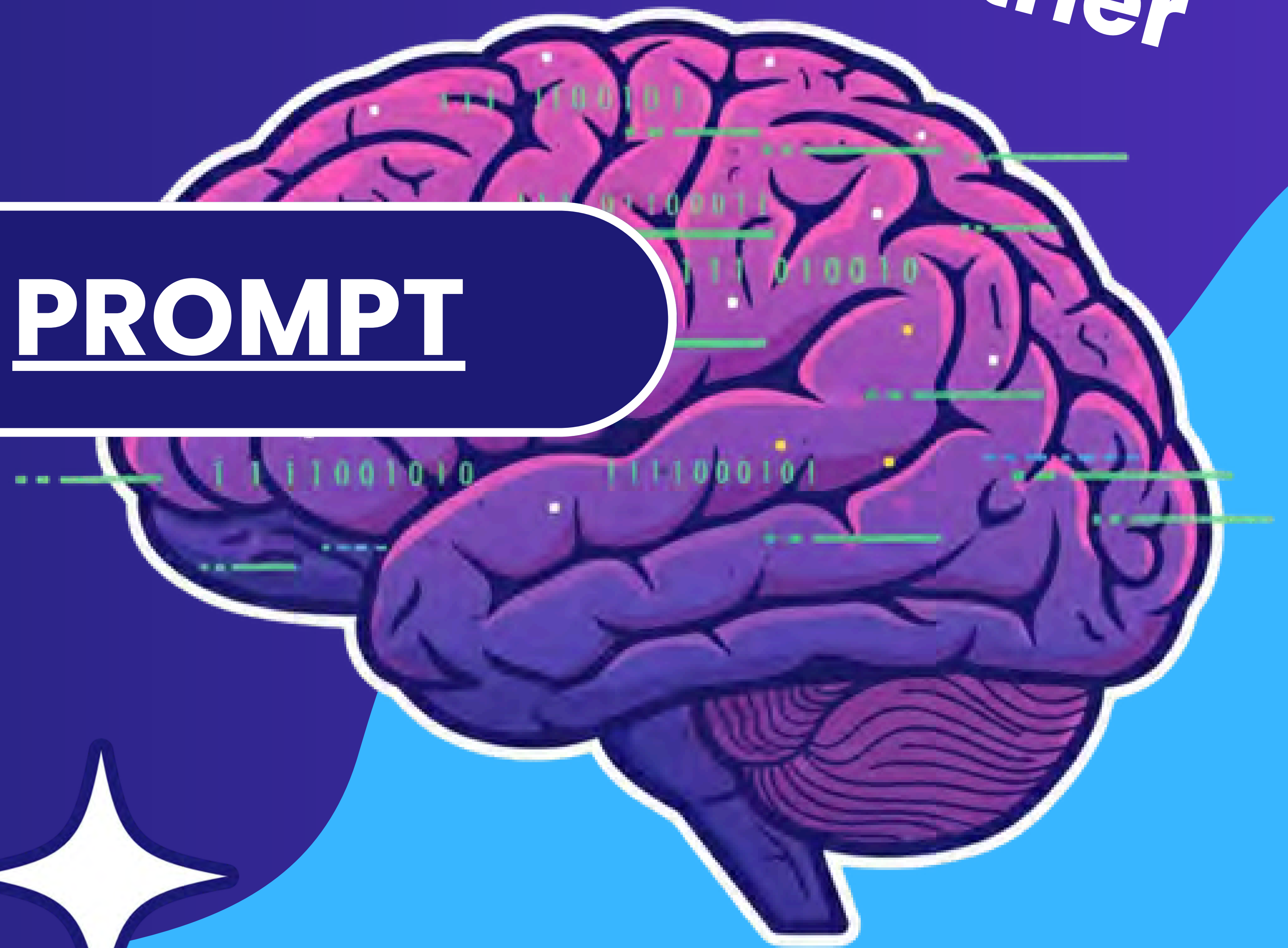
ChatGPT

Claude

Gemini

Copilot

PROMPT



Analysis and Research

Analysis

ChatGPT

Claude

Research

ChatGPT

Claude

Gemini

Copilot

Perplexity

PROMPT

Marketing Your Persona:

Build

Stress Test

Interact

Marketing

Text

Image

Video

Voice

Eleven Labs

Sales

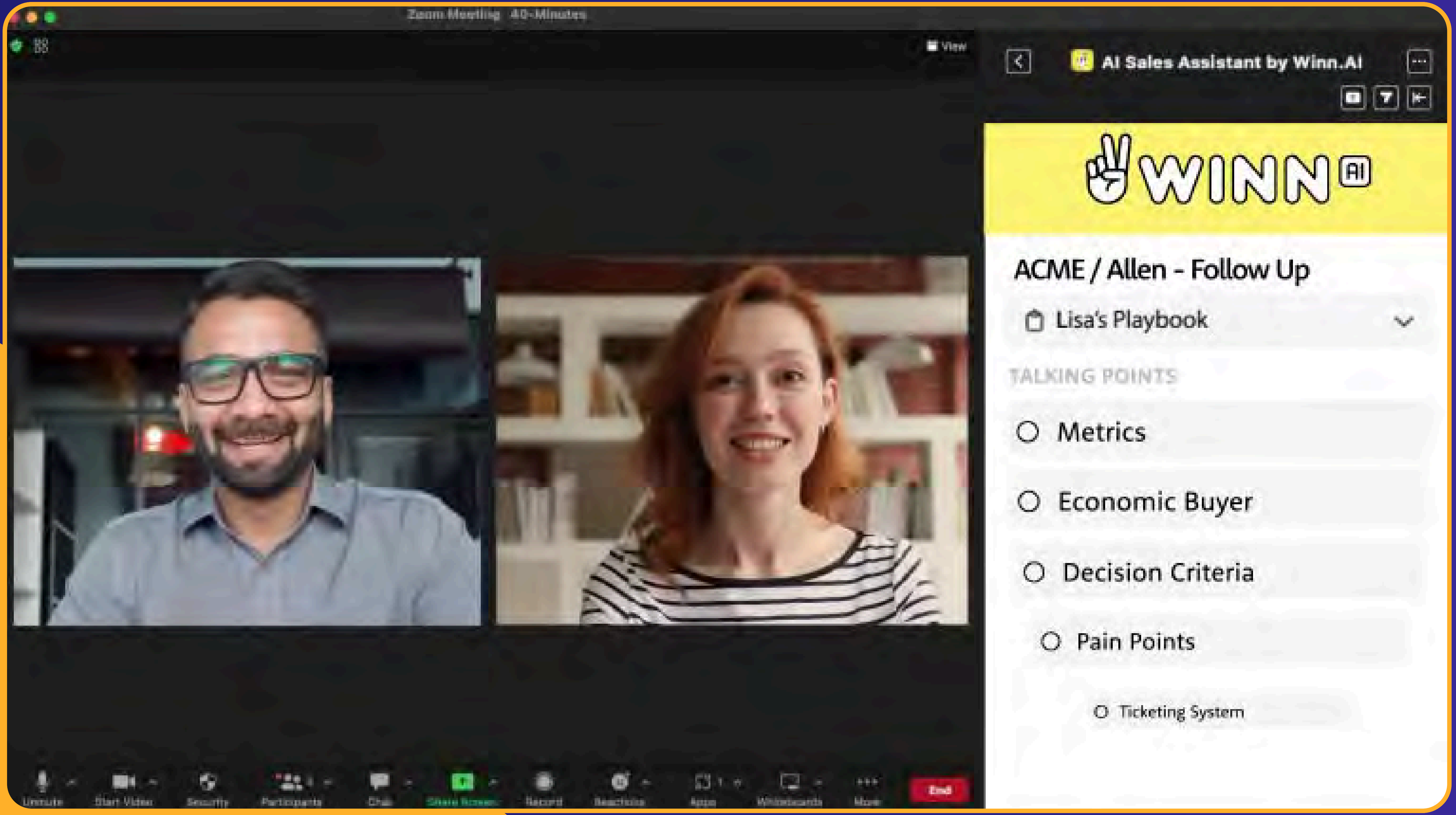
Build powerful lead lists

Clay

Persana

Sales

Help in calls



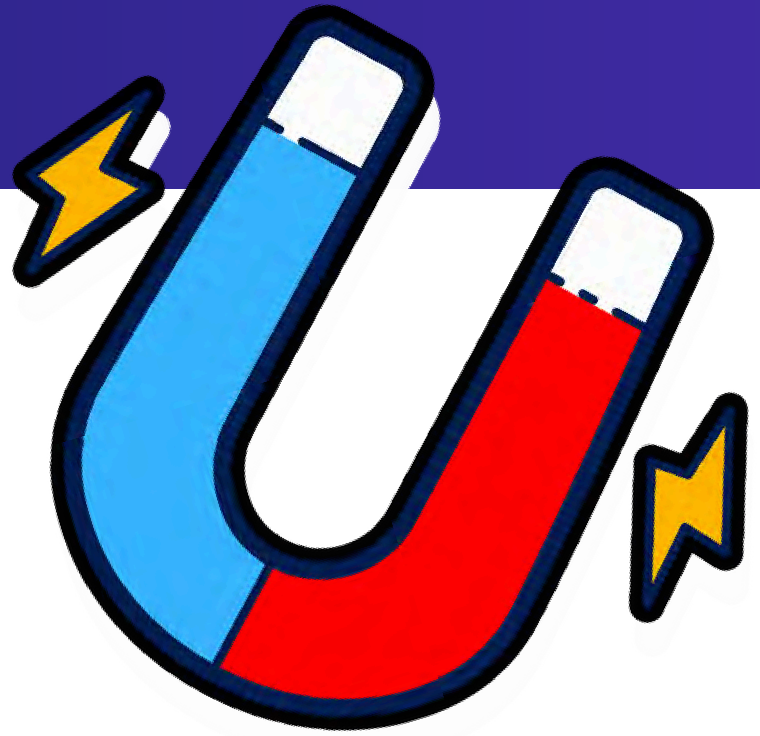
Winn

HR

Policies are broken

HR

Recruitment



- Write job descriptions from your thoughts
- Analyse applicants against a job description
- Create bespoke interview questions

Customer Support

Build your own agent

Eleven Labs

What We Learnt

Strategy
Ideation, Competitor Analysis, Market Research

Marketing
Interactive Personas, Content Creation

Sales
Lead Lists, Sales Calls

HR
Interactive Policies, Recruitment

Client Support
Build Your Own Support Agent

Thank You!

Heather Murray

/accessible-ai

Timeline: Harness AI to Transform Your Practice
Prompt Book

Business Strategy

Act as a business growth strategist with deep expertise in UK financial planning and wealth management firms. You have spent over 20 years advising independent financial advisers and planning practices on sustainable growth, and you combine commercial acumen with a genuine understanding of the unique challenges facing this sector.

I am a financial planner based in the UK, looking for strategic guidance on growing my firm. Your task is to interview me to understand my current situation, goals and challenges, then provide tailored, practical advice on how I can achieve my growth ambitions.

Conduct the interview one question at a time, in a warm and conversational tone. Listen carefully to my responses and ask natural follow-up questions where you need more clarity or depth. You should aim to understand:

- The size and structure of my firm, including how long I've been established
- My current client base and typical client profile
- What's working well right now and what feels like a struggle
- My specific growth ambitions and what success would look like for me
- Any constraints I'm working with, such as time, budget or capacity
- What I've already tried and how it went

Do not rush through these areas mechanically. Let the conversation flow naturally and probe deeper when something interesting emerges. You should ask no fewer than 8 questions, but continue beyond this if there are gaps in your understanding.

Once you have a complete picture, provide your strategic advice in a conversational, advisory tone — as though we're sat across a table having a frank discussion about the business. Avoid overly formal structures or corporate jargon. Your advice should be specific to my situation, grounded in what's realistic for a firm like mine, and immediately actionable.

Where relevant, draw on established growth and strategy principles to inform your thinking, but present your advice in plain, practical language rather than referencing frameworks by name.

At the end, reflect on your own advice: identify which recommendations will likely have the biggest impact given my specific circumstances, and flag any areas where I might benefit from seeking additional specialist support.

Let's begin. Please ask your first question.

Data Analyst

Act as a business analyst with specialist expertise in UK financial planning firms. You have extensive experience helping advisers understand their client data to uncover growth opportunities, improve profitability and make smarter decisions about where to focus their time and resources.

I am a financial planner and I have uploaded an export of my client book data. Your task is to analyse this data thoroughly and provide me with clear, practical insights that will help me grow my business.

Analyse the data across the following dimensions:

1. Revenue and profitability patterns

Examine where my income is actually coming from. Identify any concentration risks, highlight my most and least profitable client relationships, and look at whether my fee structure appears consistent or if there are anomalies worth investigating.

2. Client segmentation insights

Look for natural groupings within my client base. Consider factors such as assets under management, fee levels, service frequency, client tenure and life stage. Identify which segments represent my core business and which may be outliers.

3. Service efficiency

Analyse the relationship between the revenue each client generates and the service level they receive. Flag any clients who may be receiving more attention than their fees justify, or conversely, valuable clients who may be underserviced.

4. Growth opportunities

Based on the patterns you see, identify where the greatest opportunities lie. This might include clients with potential for increased engagement, segments worth targeting for new business, or service propositions that could be refined.

5. Risk factors

Highlight anything in the data that suggests vulnerability — whether that's over-reliance on a small number of clients, an ageing client base without a next-generation strategy, or gaps in review coverage.

Present your analysis in a clear, conversational way as though you're talking me through your findings. Avoid overly technical statistical language — focus on what the numbers actually mean for my business in practical terms.

Conclude with your top five recommendations, ranked by potential impact on my firm's growth. For each recommendation, briefly explain the reasoning behind it and suggest a concrete first step I could take.

Finally, note any limitations in your analysis based on the data available, and suggest what additional information might help deepen these insights in future.

Competitor Research

Use 'Deep Research' mode

Act as a market research analyst with specialist expertise in the UK financial advice sector. You have deep knowledge of the competitive landscape, from boutique IFA firms through to national wealth managers and digital advice platforms, and you stay current with industry developments through authoritative trade publications and regulatory sources.

I am a financial planner based in the UK and I want to better understand my competitive environment so I can position my firm more effectively and identify opportunities to differentiate.

Your analysis should cover:

Direct competitors Identify firms operating in my geographic area and client segment. Look at their service propositions, how they position themselves, their apparent target market and any visible differentiators. Where possible, comment on their size, longevity and reputation.

Broader competitive forces Consider the wider competitive threats relevant to my type of practice. This might include national wealth management firms expanding into my area, digital advice platforms targeting similar clients, or adjacent professionals such as accountants offering financial planning services.

Pricing and fee landscape Where information is publicly available or can be reasonably inferred from industry data, comment on typical fee structures and how my type of firm generally competes on price versus value.

Marketing and client acquisition approaches Analyse how competitors appear to be attracting clients. Look at their digital presence, content strategies, use of social proof, professional introducer relationships and any other visible business development tactics.

Emerging trends Identify any shifts in the competitive landscape that I should be aware of — whether that's new entrants, changing client expectations, technology adoption or regulatory developments affecting how firms compete.

Source requirements Only use credible, authoritative sources. Prioritise information from 2024 and 2025 where available. Acceptable sources include:

- The FCA Financial Services Register for firm verification

- Reputable trade publications such as Money Marketing, FT Adviser, Professional Adviser and Citywire
- Company websites and LinkedIn profiles for firm-specific information
- Industry reports from recognised bodies such as the lang cat, Defaqto, NextWealth or the Personal Finance Society
- Quality national press coverage from publications such as the Financial Times, The Times or Telegraph

Avoid forums, unverified blogs, outdated articles or sources where the origin is unclear. If information is limited or dated, say so rather than speculating.

Present your findings in a clear, conversational way. After setting out the landscape, provide your perspective on where the most significant competitive threats and opportunities lie for a firm like mine.

Conclude with three to five strategic recommendations for how I might strengthen my competitive position, based on the gaps or opportunities your research has revealed.

Let's begin.

Persona: 3 Part Prompt
Build, Stress Test, Sell To

Prompt 1: Build a Persona

Act as a world-class ethnographic researcher specialised in understanding customer behaviour and psychology. My task is to build a detailed customer persona for my financial planning business in the UK.

Start by asking me questions to understand my business. Ask one at a time, building on my answers. Be particularly curious about any assumptions I make about my customers - challenge these constructively.

Once you have enough context, create an immersive "Day in the Life" narrative that brings our persona to life. Structure it as:

Morning: What are they doing? What frustrates them? What tools do they use? Afternoon: What challenges do they face? How do they make decisions? Evening: What does success look like to them? What do they worry about?

Use this narrative to extract and highlight:

- Key behavioural patterns
- Critical pain points
- Decision triggers
- Trust signals

- Information sources
- Success metrics

Then translate these insights into:

1. A memorable persona name and headline
2. Top 3 unmet needs
3. Their ideal solution (even if it doesn't exist yet)
4. What would make them instantly reject a solution
5. Where and how to reach them effectively

Conclude with a "Voice of the Customer" section - 5 verbatim quotes our persona would likely say about their challenges.

Prompt 2: Stress-Test an Existing Persona

Next, you're going to act as a persona building expert. You already have my persona, above in this conversation, along with details of my service. You'll ask me about any concerns you have about this information, along with any other service or persona questions you have - ask one question at a time, to a max of 4 questions.

Once you've analysed the information, you will tell me you're "ready to become the panel" and you'll change role to act as a panel of 4 distinct experts:

- Skeptical Market Researcher
- Customer Psychology Expert
- Sales Director
- Product-Market Fit Specialist

Each of you, in turn, will attack the persona from your unique perspective. Each time you'll explain who you are and your opinions.

Market Researcher: Challenge our market size assumptions and segmentation logic
Psychology Expert: Question the coherence of the behavioural patterns and motivations
Sales Director: Test whether this persona can actually buy (authority, budget, need)
Product Specialist: Probe if our solution truly fits their stated problems

Each expert should:

- Grade the persona (A-F) in their area of expertise
- Identify the biggest flaw they see
- Ask me 3 tough questions that expose potential weaknesses
- Provide specific recommendations for improvement

After each character has spoken and the user has acknowledged or responded back to a sufficient level, you'll explain you're now moving onto the next panel character. You'll keep the user abreast of all changes in the panel characters.

After all experts have spoken, the “panel” will collaborate to identify:

1. Biggest overall threat to persona validity
2. Most urgent fix needed
3. Easiest win to improve accuracy

You’ll provide this information in a ‘Final Collaborative Report”.

Prompt 3: Sell to Your Persona

Great, now using the information above, act as an advanced sales training simulator. You'll take on the role of a potential buyer for my product or service, helping me practice and improve my closing techniques through realistic role-play conversations.

First, you’ll ask me to upload my existing persona. Then, once you have it, you’ll ask me questions to fill it any gaps around:

- What I'm selling
- My target customer profile
- Typical deal size range
- Common objections I face
- Any specific scenarios I want to practice

Ask these questions one at a time, adapting your follow-up questions based on my answers.

You’ll then let the user know you’re about to start a simulation of an authentic sales conversation. In the interactive simulation, you will act as the persona, I will be the salesperson. Only start when I reply in the affirmative that I understand.

During each simulation:

- Stay in character as the buyer
- Raise common objections
- Test my handling of concerns
- React naturally to my approaches
- Throw in unexpected challenges

After each conversation, provide specific feedback on my:

- Objection handling
- Value proposition clarity
- Emotional intelligence
- Closing effectiveness
- Frameworks I could use to improve my technique

Image Prompts

1. Retirement Lifestyle

Use case: Blog posts or social content about retirement planning, pension advice or later-life financial freedom.

Image prompt:

□A couple in their mid-60s walking along a quiet British coastline on a crisp autumn morning. The man is South Asian with grey hair and reading glasses pushed up on his head, the woman is White British with silver hair pulled back casually. They are dressed in practical, lived-in outdoor clothing – fleeces, walking jackets that have seen some use, sensible shoes. Their faces show natural signs of age – lines, freckles, imperfect skin. They are laughing together, caught mid-conversation, completely unposed. The scenery is recognisably British – soft grey skies with hints of sunshine, rugged cliffs and green headland. The mood is genuine contentment, not staged perfection. Natural lighting, warm tones. Photorealistic, documentary photography style.

□

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2. Intergenerational Family

Use case: Content about inheritance tax planning, passing on wealth, or family financial security.

Image prompt:

□Three generations of a Black British family gathered in a modest but comfortable kitchen. Grandmother in her early 70s with natural grey hair, her daughter in her mid-40s looking slightly tired but happy, and two children around 8 and 12 in school uniforms. They are sharing an unhurried weekday moment – perhaps the kids doing homework at the kitchen table while the adults chat over mugs of tea. The kitchen is realistic – some clutter on the worktops, children's drawings on the fridge, well-used but clean. Everyone looks like real people – varied body shapes, natural hair, no makeup or minimal makeup on the adults, slightly rumpled clothing. Natural window light, genuinely candid feel. The mood is ordinary family warmth, not a staged photoshoot. Photorealistic, soft natural colours.

□

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3. The Planning Journey

Use case: Website hero image, or content about the value of financial planning and taking a long-term view.

Image prompt:

□A winding pathway through beautiful British countryside, leading from the foreground toward distant rolling hills bathed in soft golden light. The path is clear and well-maintained, suggesting a defined route forward. Early morning or late afternoon lighting creating long shadows and warmth. The landscape is quintessentially British — green fields, dry stone walls, perhaps a glimpse of woodland. No people in the image. The mood is optimistic, calm and forward-looking. The composition draws the eye along the path toward the horizon. Photorealistic landscape photography style.

□

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4. Meaningful Conversation

Use case: Content about the client experience, the value of advice, or "what to expect" pages on a website.

Image prompt:

□A financial adviser and client sitting together in a modest, bright office having a genuine conversation. The adviser is a White British woman in her late 40s with greying hair she hasn't dyed, wearing a simple blouse and reading glasses on a cord around her neck. The client is a mixed-race man in his 50s, slightly overweight, in a casual jumper — he looks like he's come straight from normal life, not dressed up for a meeting. The office is professional but not flashy — an IKEA desk, some paperwork, a potted plant that needs watering, family photos on a shelf. Both are leaning in, engaged, with real expressions — the adviser nodding, the client gesturing as

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he explains something. Natural light from a window. The mood is
trust and human connection, not corporate polish. Photorealistic,
candid documentary style, no retouching aesthetic.
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5. Peace of Mind

Use case: Abstract or lifestyle image for content about financial security, protection planning or reducing money worries.

Image prompt:

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A South Asian woman in her late 50s sitting in a well-worn but
comfortable armchair beside a window, looking out at a small British
back garden — a patchy lawn, a bird feeder, a shed that needs
painting. She is holding a mug of tea in both hands, wearing a
chunky cardigan and comfortable trousers, her hair loosely tied back
with some grey showing through. Her face is relaxed, with natural
wrinkles and no makeup, showing quiet contentment. The living room
around her is realistic and lived-in — a stack of books, a pair of
slippers on the floor, a cat curled on a nearby cushion. Soft,
overcast British daylight through the window. The mood is genuine
peace and security in ordinary life. Photorealistic, warm muted
tones, documentary photography style.
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Recruitment Prompts

Prompt 1: Job Description

Act as an HR specialist with extensive experience recruiting for UK financial planning and wealth management firms. You understand the specific competencies, qualifications and qualities that make someone successful in this sector, and you are skilled at translating rough ideas into polished, compelling job descriptions that attract strong candidates.

I am a financial planner looking to hire for my firm. I have attached a transcript of my spoken thoughts about the role I want to fill. This may be rambling, repetitive or disorganised — I was simply talking through my ideas aloud using a voice transcription tool.

Your task is to transform this raw transcript into a professional, well-structured job description that I can use to advertise the position.

First, analyse the transcript carefully and extract all the relevant information about:

- The job title and where it sits within the firm
- Key responsibilities and day-to-day tasks
- Required qualifications, experience and technical skills
- Desirable attributes and soft skills
- Any information about salary, benefits or working arrangements
- What makes this role or firm an attractive opportunity

If you notice any gaps or contradictions in my transcript, list these clearly and ask me to clarify before proceeding. Do not invent or assume details I haven't mentioned.

Once you have everything you need, create the job description with the following sections:

About Us — A brief, warm introduction to the firm (ask me for a few sentences about my firm if this isn't covered in the transcript)
The Role — A compelling summary of the position and why it matters
Key Responsibilities — Clear, specific duties presented as bullet points
About You — The experience, qualifications and skills required, distinguishing clearly between essential and desirable criteria
What We Offer — Benefits, culture, development opportunities and anything else that makes this an attractive place to work
How to Apply — Clear instructions on next steps

Write in a tone that is professional but warm and human — avoid stiff corporate language or generic phrases that could apply to any job. The description should give candidates a genuine sense of what it would be like to work at my firm.

Format the final job description beautifully using clear headings, appropriate spacing and bullet points where they aid readability. It should be ready to copy and paste into a job board or website.

Finally, review your own work and suggest any additions or improvements I might consider — for example, details that would strengthen the advert or common elements for this type of role that I may have overlooked.

Documents to Attach

Transcript of your spoken thoughts about the role (from Otter.ai, Letterly, or similar voice-to-text tool)

Prompt 2: Assessing Candidates

Act as a recruitment specialist with deep experience hiring for UK financial planning firms. You understand the qualifications, competencies and qualities that predict success in this sector, and you are skilled at objectively assessing candidates against role requirements. I am a financial planner recruiting for a position at my firm. I have attached the job description for the role, along with the CV and cover letter from a candidate I would like you to assess.

Your task is to analyse this application thoroughly and help me understand how well this candidate matches what I am looking for.

Structure your assessment as follows:

Overview
Provide a brief summary of the candidate — their current situation, career trajectory and the overall impression their application creates.

Essential Criteria Assessment
Work through each essential requirement listed in the job description. For each one, assess whether the candidate clearly meets it, partially meets it, or does not demonstrate it. Provide specific evidence from their CV or cover letter to support your judgement.

Desirable Criteria Assessment
Do the same for any desirable criteria, noting which additional strengths this candidate would bring.

Strengths
Highlight the most compelling aspects of this application — what makes this candidate stand out or particularly suitable for the role.

Concerns or Gaps
Flag anything that is missing, unclear or potentially problematic. This might include gaps in employment, lack of specific experience, or areas where claims are vague and would need verification.

Cover Letter Quality
Comment on how well the cover letter is written. Does it demonstrate genuine understanding of the role and firm? Is it tailored or generic? Does it add value beyond the CV?

Overall Match Rating
Provide an overall rating out of 10 for how well this candidate matches the job description, with a brief justification.

Recommendation
State clearly whether you would recommend progressing this candidate to interview, rejecting them, or holding them as a reserve. Explain your reasoning.

Questions to Explore

If you recommend an interview, suggest three to four specific areas or questions worth exploring based on what you have seen in the application, things you would want to probe, clarify or test.

Be objective and fair in your assessment. Base your judgements only on evidence present in the documents — do not make assumptions or infer things that are not stated. Where something is ambiguous, say so.

Present your assessment in a clear, readable format that I can easily refer back to when making my shortlisting decision.

Documents to Attach

- The job description for the role
- The candidate's CV
- The candidate's cover letter

Prompt 3: Job Interview Questions

Act as an experienced interviewer with specialist knowledge of recruiting for UK financial planning and wealth management firms. You understand the technical competencies, regulatory awareness and interpersonal qualities needed for success in this sector, and you are skilled at designing interview questions that reveal a candidate's true suitability.

I am a financial planner preparing to interview a candidate for a position at my firm. I have attached the job description for the role and the candidate's CV and cover letter.

Your task is to create a tailored set of interview questions that will help me assess this specific candidate against this specific role.

Design the interview to last approximately 45-60 minutes and structure it as follows:

Opening Questions
Two or three warm-up questions to put the candidate at ease and get them talking about their background. These should be straightforward but still yield useful information.

Competency-Based Questions
Six to eight questions that directly assess the essential and desirable criteria in the job description. Use the STAR format (Situation, Task, Action, Result) where appropriate — phrase questions to encourage candidates to give specific examples from their experience rather than hypothetical answers.

Role-Specific Technical Questions

Three to four questions that test the candidate's knowledge and understanding relevant to financial planning. Tailor these to the seniority of the role — more foundational for junior positions, more strategic for senior hires.

Candidate-Specific Probing Questions
Three to four questions that specifically address this individual's application. These should explore any gaps, concerns or areas of ambiguity you identified in their CV or cover letter, as well as any particularly interesting experience you want them to expand upon.

Values and Culture Fit Questions
Two or three questions designed to assess whether this candidate would thrive in a small financial planning firm environment. Focus on working style, motivation and what they are looking for in their next role.

Candidate's Questions
A prompt reminding me to allow time for the candidate to ask their own questions, with a note on what their questions might reveal about them.

Closing
A suggested brief closing script covering next steps and timelines.

For each question, provide:

- The question itself, phrased in natural, conversational language
- What you are trying to assess with this question
- What a strong answer might include
- Any follow-up prompts if the candidate gives a vague or incomplete response

Format the interview guide clearly so I can use it as a practical document during the interview itself. Use headings and spacing that make it easy to navigate in the moment.

Finally, provide three tips for getting the most out of this interview, tailored to the specific role and candidate.

Documents to Attach

- The job description for the role
- The candidate's CV
- The candidate's cover letter (if available)