

GRANNOM CONSULTING
INDEPENDENT PRACTICE GUIDES / 01

A relationship system for independent consultants

A practical guide to using AI to remember commitments, prepare for meetings and keep in touch.

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Shared freely for other independent consultants.
Your chosen AI service may require a subscription.

01 INTRODUCTION

Running an independent practice

I have spent more than 30 years advising organisations on communications and corporate affairs and leading communications functions, including 17 years at Microsoft. When I set up Grannom Consulting, I quickly realised that knowing my profession was only part of what I needed. I also had to learn how to run a small business on my own.

Relationships are a huge part of that job: remembering what someone said, following up on a promise, preparing for a meeting and staying in touch when there is no immediate project to discuss. In a larger organisation, colleagues, assistants and shared systems help with much of this. Working independently, it falls to you. Whether it is existing client work or finding new clients – there are a lot of moving parts.

There is a general trend in the employment market currently which is seeing many experienced people across different sectors making the same transition. I suspect quite a few will recognise the feeling of being confident in their work and less certain about everything else around it.

How I started using AI

There is a great deal of attention on AI as a writing tool. I actually think that this is one of the least interesting aspects to AI. AI is a general purpose technology with applications far beyond writing. For me, some of its most useful applications have been the systems that support my business. I am not a coder or an engineer. Despite my technology industry background, I have always worked in non-technical roles. I have a history degree for goodness sake! So, it is with no false humility that I say I built this by explaining what I needed, checking the results and refining it in conversation. All in plain English.

The result provides some of the support I would value from a good executive assistant or chief of staff. It catches commitments, organises context and brings things back to my attention, leaving me more time for the work that needs my experience and judgement.

Why I am sharing it

Creating AI tools like this is not a service that Grannom Consulting sells. Far from it – I provide strategic communications consultancy services. I am sharing this because the system has become extremely useful in running my own consultancy. Other independent consultants I mentioned it to were interested, but unsure how to begin. So I pulled this together and then thought that I might as well share it more widely in case it was useful to others. This guide explains what I did and gives you a starting point for your own version. I dare say that others with more proficient AI or technology skills could improve on it. To which I would wholeheartedly say – “I agree”! My view is that if I can do this, anyone can do this.

Who this is for

It is for independent consultants in any sector whose work depends on professional relationships. If a commercial CRM feels too expensive or complicated for what you need (which it did for me), this is a modest alternative you can shape around your own practice. You do not need to become a software developer to get started.

02 HOW THE SYSTEM WORKS

Useful support from information you already have

The system combines a saved relationship record with an AI that helps maintain and review it. With the appropriate access, it can draw on your email and calendar, so you do not have to report every exchange yourself. Your debriefs supply the context and judgement that those sources cannot provide.

Source	What it contributes
Calendar	People, dates and meeting details. An invitation shows what was scheduled, not whether it happened or what was agreed.
Email	Promises, introductions, replies and changed roles. Agree which accounts and correspondence the AI may read.
Your debriefs	What mattered, your interpretation and what you want to do next. Speak naturally; the account need not be in order or beautifully composed.
Authorised transcripts	Actions, timing and agreements. Obtain participants' permission for transcription of online or offline meetings and for using the transcript with AI before supplying it. These are particularly useful and allow you to focus on the conversation in the meeting.

What the record contains

Keep it simple enough to maintain. A spreadsheet or another editable file can be sufficient; agree a format the AI can actually create and update. The important thing is to have a saved record you can find and review again. I rarely look at the underlying comprehensive record. I almost exclusively interrogate it and receive updates from it via my AI tool.

Part of the record	What you will use it for
People	Remember who someone is, how you know them, why the relationship matters and when you last spoke.
Conversations	Recover the outcome of meetings and exchanges, including the source and anything still to clarify.
Commitments	See what you and other people promised, who owns the next step and when it is due or worth reviewing.
Possible work	Keep evidence of a need or potential project separate from general goodwill. Record uncertainty rather than assigning false confidence.
Review arrangements	Retain your chosen sources, exclusions, routine and delivery method so the system continues to work as you intended.

A LinkedIn connections export or an existing contact list can suggest additional people to include. Review it first: a connection is not necessarily a relationship you need to manage.

03 USING IT EACH WEEK

A Friday and Monday routine

My routine has two reviews. Friday afternoon brings the record up to date while the week is still fresh. Monday morning uses that updated picture to help me decide where to spend my attention. This is where the information becomes useful day to day. You may prefer a completely different rhythm.

Friday review

The AI reviews the week's calendar activity and relevant correspondence against the saved record. It identifies missing meeting outcomes, new commitments and actions that appear to have been completed. I fill the important gaps, correct anything it has misunderstood and confirm what should carry forward.

An example of a Friday update

You had four meetings this week. Two have debriefs; please confirm whether Tuesday's call took place and what came out of Thursday's meeting. The outline promised to Priya appears in your sent email. One action is waiting on a reply, and you still need to agree a date for the workshop discussion.

Monday review

The Monday review starts from those updates and looks ahead: what is due, which meetings need preparation and which relationships have a sensible reason for attention now. It should explain its priorities, not simply produce a long list of names. I make the decisions and decide what to act on.

An example of a Monday review

Prepare for Wednesday's meeting with Leila using the previous discussion and the two open questions. Follow up with Priya because her planning meeting has now passed. Ask Daniel for the figures needed for your proposal. Leave the workshop possibility for its agreed review date; there is no new reason to chase it. You should reconnect with Lisa following your coffee in the summer.

Between the reviews

I update the system mainly by voice though you can easily type it instead. I may ramble, double back or remember something halfway through. That is fine. The AI sorts the account into the relevant people, conversations and actions, then asks a short question if an important detail is unclear. I do not have to turn a conversation into a carefully written report first.

I receive my reviews by email as well as accessing them in the AI interface. Ask your own AI which delivery and scheduling options it can genuinely support. You may prefer a daily check, a single weekly review or a monthly cycle. The routine should fit you; automated delivery is an option where available.

04 WORKED EXAMPLE

Updating the record after a meeting

Here is a fictional example from an independent operations consultant. The spoken note is deliberately conversational. The AI should organise it without losing the distinction between a fact, an intention and a possibility. I try to do this as soon as is practicable after a meeting or conversation. Even verbally on my phone while walking down the street.

An informal dictated debrief

“I spoke to Leila at Northbank Foods just now. The company reorganisation is now due in February, not January. She wants a checklist for the handover, and I said I’d send the example I mentioned by Thursday. Just the blank version, obviously, not another client’s material. She’ll ask their operations director whether they need outside help with the move, but there’s no brief yet. Oh, one thing I forgot: the February date isn’t public, so don’t put it in an introduction or anything. And separately, Daniel still hasn’t sent the new figures for the other project. Remind me to ask him next week. I don’t think there’s anything else for Leila until she’s had that internal conversation. Oh and can you remind me this afternoon when I get back to send that proposal to the VC Venture fund that I should have done yesterday?”

What is recorded	How the system treats it
Relationship and meeting	Record Leila’s conversation about the change. Change January to February, with the year confirmed, against the correct organisation.
Your commitment	Send the blank checklist by Thursday. Confirm the date. Do not attach or reuse another client’s material.
Leila’s next step	She will speak to the operations director. Record that you are waiting and ask when to review; do not invent her deadline.
Possible work	Note the possible need for help, with no brief or commitment yet. Keep the uncertainty visible.
Confidential context	Keep the changed move date out of introductions and other outward-facing suggestions. Retain only necessary, appropriate private context.
Separate action	Record Daniel’s figures against the other project. Propose a reminder date next week for your approval.

Why the debrief matters

The calendar invitation alone would not reveal the changed timing, the promise of a blank checklist or the reason to wait. Your account supplies that context. If you have an authorised transcript, the AI can extract the factual actions from it; a short personal debrief can then add your interpretation.

05 GETTING STARTED

Setting up your first version

My business uses an ordinary Microsoft 365 Business setup. I give my AI access to the relevant calendar and email information. That is an illustration of my environment: the same approach can use Gmail and Google Calendar where your AI offers the necessary connections. You should check what privacy and security commitments are part of your AI subscription. A paid Microsoft Copilot subscription, used with eligible work accounts offers enterprise level data protection and none of your data is used to train their AI models. It's the same security and privacy as when I was inside a much larger organisation. OpenAI (Chat GPT) also provides specific commitments for its business products. I'm not an expert in which AI service you should use but my informal advice is not to use a free service and you must do your own research to make sure that yours and your clients' information is held privately and securely.

1 Agree what to include

Start with your business, the kinds of relationships that matter and a manageable period of calendar history. Identify personal appointments, clients or other activities to leave out. My own starting point was a review of people I had met, followed by a conversation to clean up the list.

2 Review the proposed people and actions

Correct names, combine repeat appearances and remove irrelevant people. Check whether scheduled meetings actually happened. Add missing outcomes and clarify who promised what. You can supply selected contacts from LinkedIn or another list at this stage too.

3 Save the record and try an update

Agree where the record will live and how the AI will update it. Ask it to create the first version, then give it a short debrief and check the revised file. Reopen it in a later conversation to confirm that the information remains available. Keep an export or backup you control.

4 Choose your review routine

Agree the timing, contents and delivery method. Check any scheduled review has actually been created. If your service cannot run it automatically or deliver it by email, use a calendar reminder to request the review yourself. Adapt the routine after trying it for a week or two.

Check privacy before connecting accounts

Choose a service with privacy and security terms suitable for your business and the information involved. Paying for a consumer subscription does not automatically give you business protections. Check model training, retention, access permissions, connected apps and your obligations to clients before supplying any information relating to them.

06 COPY AND PASTE

The setup prompt

Copy the whole passage below into your chosen AI as one message. It starts a guided conversation: answer the questions, review the proposed list and agree how the record will be saved.

Help me create and maintain a practical relationship management system for my independent consultancy. I want you to help me remember conversations and commitments, prepare for meetings, identify useful connections and decide where to focus my attention. Keep the administration for me to a minimum.

Start by asking me about my business, the relationships I want to manage, which calendar and email account you may use and how far back to look. Ask what people, clients or activities should be excluded. Before accessing or uploading information, help me identify the privacy settings and permissions I need to check. Tell me clearly what you can access and what I would need to provide myself.

Once we have agreed the scope, review my calendar and relevant supporting information to propose a list of people I have met. Combine repeat meetings with the same person. Exclude personal appointments, routine reminders and cancelled meetings. Show me the list so we can correct names, remove irrelevant people and agree who belongs in the system.

For each relationship, keep a useful record of the person and organisation, contact details where known, meeting dates, what we discussed, the outcome, outstanding commitments and appropriate follow up. Distinguish what is known from what still needs my input. Do not assume that a scheduled meeting happened or that a friendly conversation represents potential work.

Agree with me where the record will be saved and how you will update it. Create the first version once I have approved the list.

After meetings, I will usually dictate an informal account of the conversation. It may be rambling or out of order. Extract the relevant details and update the record. I may also provide a transcript where participants have agreed to transcription and its use with AI. Ask short clarification questions when necessary, particularly about who promised what and when. Prompt me for an update when a meeting has no recorded outcome.

Help me establish a regular review. As a starting point, suggest a Friday review of the week's activity and a Monday review of priorities, upcoming meetings and follow up. Ask what timing and delivery method suit me, including email where available. Confirm which parts you can automate and set those up with my approval. Explain plainly anything I will need to initiate myself.

Look across the whole network for useful introductions, shared interests, recurring themes and potential opportunities. Explain your suggestions and keep commercial possibilities proportionate to the evidence.

Take me through the setup one stage at a time. Begin with the questions you need answered.

07 CONCLUSION

Support for your independent practice

Running your own consultancy asks you to do a great deal around the work clients actually buy. Relationships, preparation and follow up all matter, but they can take more attention than you have available. This system gives that part of the business a reliable place to live and a regular way to review it.

The approach is straightforward. Use the information you already have, add your own account of important conversations and let the AI organise it into a record you can check. A regular review then helps you see what needs doing, which meetings need preparation and where a useful connection may have been missed.

For me, the value is practical: less reliance on memory, fewer loose ends and better preparation. I still judge the relationships and decide what to do. The system helps me arrive at those decisions with the relevant information in front of me.

Start with the relationships that matter now

You do not have to capture everyone you have ever met. Begin with a manageable group, check the first records and use the system for real work. Dictate a debrief, ask for help preparing a meeting and try a weekly review. When something is unhelpful, tell the AI what you want changed. That is how I developed my own version.

You can build this through conversation

The prompt gives you a starting point, and the conversation lets you shape it around your practice. You do not need technical expertise to describe what would help you. Start with a useful first version and improve it as you use it.

About James Tutt and Grannom Consulting

I advise communications and corporate affairs leaders, CEOs and boards on the role and value of communications, how the function is organised, corporate narrative and the practical use of AI in communications functions. I also provide strategic counsel through reputational, regulatory and organisational change.

For agencies, I bring an experienced client-side perspective to senior relationships, briefs, account challenges and important pitches. My background includes 14 years in agencies and 17 years at Microsoft, where I had various leadership roles including five years leading all UK communications.

If you would like an outside view on one of those questions, please visit my website or drop me a line. I work through focused reviews, advisory projects, workshops and continuing counsel.

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