



AI ERP TicketingOS – Consulting Firms

Law · Management · ISO/QMS · IT/ERP/AI · Marketing · Accounting

Project / retainer billing · Time tracking · AI knowledge mgmt · Milestone payments

1. Master Consulting Execution Flow (Lead → Delivery → Billing)

ID	Department	Process	Activity	Action	Progress %
C001	Sales	LEAD	Inquiry	Website / referral / call → auto ticket	5
C002	Consulting	DISCOVERY	Needs assessment	Client meeting, problem statement	10
C003	Legal / Advisory	PROPOSAL	Terms & SOW	Scope of work, fee structure (fixed/hourly/retainer)	15
C004	Legal	CONTRACT	Agreement signing	NDA, engagement letter, liability clause	20
C005	Project Mgmt	RESOURCE ALLOCATION	Assign consultant team	Skill match, availability check	25

ID	Department	Process	Activity	Action	Progress %
C006	Delivery	EXECUTION	Consulting work	Research, analysis, documentation, legal drafting, audit	45
C007	QA	REVIEW	Internal peer review	Quality check, compliance (ISO, legal standards)	55
C008	Delivery	DELIVERABLE	Report / opinion / certificate / system design	Client presentation, handover	70
C009	Client	FEEDBACK & ACCEPTANCE	Client sign-off	Acceptance certificate, change request if any	80
C010	Finance	INVOICE	Billing	Time + expenses / milestone / retainer drawdown	90
C011	Finance	PAYMENT & COLLECTION	Settlement	Auto reminder, late fee, reconciliation	100

2. Service-Specific Consulting Workflows

Law Firm

Client intake →
 Conflict check →
 Legal research →
 Drafting

Management Consulting

Strategy workshop →
 Data analysis →
 Benchmarking →

ISO / 6Sigma QMS Consulting

Gap analysis →
 Process mapping →
 Documentation

IT/ERP/AI Consulting

Requirement analysis
 → Software selection
 / custom build →

(pleadings/contracts)
→ Review → Filing /
court appearance →
Billing (hourly /
contingent)

Recommendation
deck →
Implementation
roadmap → Monthly
retainer

(manual, SOP) →
Internal audit →
Pre-assessment →
Certification audit
support →
Surveillance

Configuration → Data
migration → Training
→ Go-live support →
AMC

📌 **Marketing Consulting**

Brand audit → Competitor analysis → Strategy
(SEO, social, content) → Campaign execution → ROI
tracking → Monthly reporting

📄 **Accounting Consulting**

Bookkeeping → Tax planning → Financial statement
preparation → Audit support → CFO advisory →
Compliance filing (GST, income tax)

📋 **Critical Control Points (Consulting Quality)**

- **Conflict of interest check** (law / audit).
- **Confidentiality & data security** (client data, GDPR).
- **Timesheet integrity** – GPS / screen capture for remote work (if required).
- **Peer review** – mandatory for legal opinions, QMS audit reports.
- **Regulatory compliance** – Bar council rules, ISO accreditation body rules, CPA standards.

3. Milestone & Retainer Billing Structure

Billing Model	Trigger	Payment % / Terms	Typical For
Fixed fee – milestone	Proposal accepted → 30% advance, 40% on draft deliverable, 30% on final sign-off	30/40/30	ISO certification, ERP implementation
Time & material	Monthly timesheet + expense report	100% within 15 days of invoice	Law firms, IT consulting, accounting
Monthly retainer	First of each month – auto invoice	Pre-paid monthly	Management advisory, outsourced CFO, marketing retainer
Success fee / contingent	Upon achievement of KPI (e.g., tax saved, license obtained)	% of benefit (e.g., 15% of tax refund)	Tax consulting, legal contingency
Subscription (knowledge / tool)	Annual / quarterly renewal	Upfront	Compliance updates, AI consulting tool access

🕒 Automatic late fee (2% per month) for overdue invoices – configurable by client.

4. ERP Module Mapping for Consulting Firms

Client & CRM –
Lead mgmt, conflict check,

Project & Resource –
Scheduling, skill matrix, utilisation

Time & Expense –
Mobile timesheet, OCR expense,

Document & Knowledge –
Templates, past audits,

Billing & Invoicing –
Milestone billing, retainer

Compliance & Risk –
Engagement letter, NDA, professional

proposal,
SOW

approval
workflow

legal
precedents,
AI search

drawdown,
collection

indemnity
expiry

AI Engine – Document summarisation, legal research, audit checklist generator

5. AI-Based Consulting Automation

Function	AI Automation
Legal document analysis	Upload contract → AI extracts clauses, risk points, obligation dates → creates review ticket
ISO gap analysis	AI compares client processes against ISO 9001/14001 clauses → auto generates gap report ticket
IT/ERP requirement gathering	From client interviews (transcript) → AI proposes module list, integration needs, man-days estimate
Marketing performance report	Integrates Google Analytics, social ads → AI writes narrative + recommendations
Accounting anomaly detection	AI scans ledgers → flags outliers (e.g., duplicate entries, missed depreciation) → creates review ticket
Timesheet fraud detection	Compares entry with calendar, GPS, screen time → alerts supervisor

Function	AI Automation
Retainer utilisation alert	Monitors billed hours vs retainer pool → notifies client when 80% consumed
Legal research assistant	Natural language query → AI searches case law, statutes, returns citations

6. Final Consulting ERP + TicketingOS Architecture

Lead → Discovery → Proposal → Contract → Resource → Execution → Review → Deliverable → Acceptance → Invoice → Payment

Internal ERP: Sales → Legal/Advisory → Project Mgmt → Delivery → QA → Finance

AI TicketingOS: AI Document Analysis → AI Gap Analysis → AI Requirement → AI Anomaly → AI Retainer Alert → AI Legal Research

Every consulting engagement becomes a ticket chain – from first call to final payment. Zero manual follow-up.

Engagement Traceability (Audit Ready)

Client onboarding ticket – KYC,

Work ticket – Each task (research,

Deliverable ticket – Document

Invoice ticket – Linked to work tickets,

Compliance ticket – Professional

conflict check,
engagement
letter signed

drafting, audit)
assigned to
consultant,
time logged

version, peer
review sign-off,
client
acceptance

approval,
payment
reconciliation

license validity,
CPD hours,
indemnity
insurance
expiry

Consulting Firm Dashboards

- Pipeline value by service line, win rate, average deal size
- Consultant utilisation (billable %), capacity vs demand
- Project profitability (fee vs actual hours), realisation rate (billed vs worked)
- Accounts receivable ageing (days overdue), collection efficiency
- Client satisfaction score (survey after each deliverable)
- Compliance calendar (licence renewals, audit deadlines, tax filings)
- AI-generated: "Top 5 clients at risk of churn" based on communication frequency

Industry-Specific Compliance & Extras

Law Firms –
Court date
calendar,
appearance
ticketing, client

**ISO/QMS
Consultants –**
Accreditation
body login, audit
non-conformance

**IT/ERP/AI
Consulting –**
Server access
logs,
deployment

**Marketing
Consulting –**
Campaign ROI
calculator,
keyword rank

**Accounting
Consulting –**
Direct bank
feed, auto
reconciliation,


trust
accounting
(separate
ledger), bar
council
reporting

tracker, corrective
action ticket,
certification
expiry reminder

checklist, UAT
sign-off,
hypercare
ticket system,
AMC billing

tracker, social
media
scheduler
integration,
client portal
with live
dashboards

tax filing
reminder,
client
document
vault
(encrypted),
audit trail for
each journal
entry

 AI ERP TicketingOS – Consulting Firms (Law, Mgmt, ISO, IT, Marketing, Accounting).
Full lifecycle from lead to payment. Audit-ready, AI-powered. Print to PDF (Ctrl+P) → Save as PDF.