

Stratagem AI Pro

AI-Powered Consulting Workbench

A Technical Case Study for Management Consultants

The Genesis: From Experience to Acceleration

After years of strategic consulting across financial services, technology, and healthcare, a pattern emerged: consultants repeatedly applied the same frameworks—PESTLE, Porter's Five Forces, SWOT, BCG Matrix—yet each analysis started from scratch. The frameworks were universal, but quality varied dramatically based on experience and time.

Senior partners executed PESTLE analyses with nuance, asking second-order questions about regulatory shifts. Junior consultants often produced surface-level analyses missing critical strategic insights. The delta wasn't intelligence—it was accumulated pattern recognition.

This sparked a question: ***What if we encoded senior-level strategic thinking into intelligent prompts guiding consultants toward deeper analysis?*** Not replacing human judgment, but accelerating the path to insight.

The Architecture: 37 Frameworks Across 6 Strategic Categories

Stratagem AI Pro organizes 37 battle-tested consulting frameworks into six strategic categories, each addressing a distinct phase of the consulting engagement lifecycle:

Framing (6 frameworks): Problem Statement, Scope & Guardrails, Success Metrics, Stakeholder Map, Objective Tree, Risk Framing—tools ensuring teams don't solve the wrong problem elegantly.

Structured Thinking (6 frameworks): First Principles, Second-Order Thinking, Systems Thinking, Scenario Planning, Pre-Mortem Analysis, Decision Trees—mental models preventing linear thinking and surfacing non-obvious risks.

Analysis (7 frameworks): Market Sizing, Competitive Landscape, Customer Segmentation, Porter's Five Forces, Unit Economics, Value Chain Analysis, SWOT—frameworks transforming raw business data into strategic insights.

Decision (6 frameworks): Options Matrix, Decision Criteria, Scenario Comparison, Financial Tradeoffs, Go/No-Go, Recommendation—tools helping teams evaluate options systematically and make defensible choices under uncertainty.

Execution (6 frameworks): Initiative Roadmap, 90-Day Workplan, KPI Dashboard, Change Management Plan, Operating Model, Implementation Risks—frameworks translating strategic intent into operational reality.

Communication (6 frameworks): Executive Summary, Key Insights, Storyline Outline, So What Callouts, Slide Outline, Risk Narrative—frameworks distilling complex analyses into narratives driving executive action.

The screenshot shows the Stratagem AI Pro Consulting Workbench interface. At the top, there's a navigation bar with a logo, project information ("ACTIVE PROJECT Tech Startup Series B Strategy + New Project"), and user links ("AI Advisor", "Partner View"). On the left, a sidebar lists "Dashboard", "Workflow", "Workspace", and "Settings". The main content area is titled "PROMPT LIBRARY" and features a section called "Consulting Prompt Library" with the subtitle "Curated prompts for framing, analysis, decision, and execution." It displays statistics: "Total prompts 37", "Categories 6", and "Results shown 37". Below this are six cards, each representing a different framing framework:

- Problem Statement** (Framing): Crisp, board-ready statement of the decision and stakes. Includes a "Use Prompt" button.
- Scope & Guardrails** (Framing): Define in-scope, out-of-scope, assumptions, and constraints. Includes a "Use Prompt" button.
- Success Metrics** (Framing): Translate challenge into measurable KPIs with targets. Includes a "Use Prompt" button.
- Stakeholder Map** (Framing): Identify stakeholders, power/interest, and likely positions. Includes a "Use Prompt" button.
- Objective Tree** (Framing): MECE decomposition into sub-goals and Is. Includes a "Use Prompt" button.
- Risk Framing** (Framing): Key uncertainties with likelihood/impact and indicators. Includes a "Use Prompt" button.

Figure 1: Prompt Library showing Framing frameworks with categorized prompts

The Executive Dashboard: Project Management at a Glance

The dashboard provides consulting teams with immediate visibility into active engagements, workflow progress, and recent analytical outputs. Key features include:

Quick Start Templates: Pre-configured workflows for Strategic Assessment and Market Entry Strategy enable consultants to launch structured analyses in minutes rather than hours.

Engagement Pulse: Live metrics tracking total outputs generated, latest activity timestamps, and active project counts across the team.

Recent Projects: Contextual summaries showing business scenarios, output counts, and last updated timestamps for quick re-engagement with paused work.

Workflow Progress: Visual progress indicators showing completion status across multi-step analytical workflows, enabling team leads to monitor engagement velocity.

The screenshot displays the Stratagem AI Pro Executive Dashboard interface. At the top left is the user profile icon and name "Stratagem AI Pro Consulting Workbe". To the right are buttons for "ACTIVE PROJECT" (Tech Startup Series B Strategy), "+ New Project", "AI Advisor", and "Partner View".

The main content area is titled "EXECUTIVE DASHBOARD" and features the "Stratagem AI Pro" logo. Below it is a brief description: "A consulting-grade workbench for structured analysis, decision support, and client-ready outputs." On the far right, there are links for "3 active projects" and "+ New Project".

The dashboard is divided into several sections:

- Quick Start:** A section for creating new engagements with a guided template. It includes fields for "PROJECT NAME" (Strategic Assessment) and "TEMPLATE" (Strategic Assessment). A note says "Comprehensive assessment across market, capabilities, and options." A "Create Project" button is present.
- Engagement Pulse:** A live metric summary showing "Total outputs: 2" and "Latest activity: 38 minutes ago".
- Recent Projects:** A list of active projects:
 - Tech Startup Series B Strategy:** Last updated 38 minutes ago. Description: "Our B2B SaaS company has grown from \$2M to \$18M ARR in 3 years. We're raising Series B (\$40M target) but facing pressure..."
 - Manufacturing Cost Transformation:** Last updated 40 minutes ago. Description: "A mid-sized industrial manufacturer (\$800M revenue) is facing margin compression. Raw material costs are up 22%, labor c..."
- Workflow Progress:** A section showing the progress of three analytical workflows:
 - Tech Startup Series B Strategy:** 1/7 steps completed.
 - Manufacturing Cost Transformation:** 1/7 steps completed.
 - Healthcare Market Entry:** 0/7 steps completed.

Figure 2: Executive Dashboard with Quick Start, Recent Projects, and Workflow Progress

Multi-Step Workflows: Orchestrating Strategic Analysis

Individual frameworks are powerful, but strategic engagements require sequences of analyses building upon each other. Stratagem AI Pro includes pre-configured workflows chaining frameworks into comprehensive analytical journeys:

Market Entry Strategy Workflow (3-5 hours)

This workflow addresses market entry decisions with four sequential analyses:

Step 1: Market Sizing (40 min) — Estimates TAM/SAM/SOM with assumptions and sensitivities. Provides ranges rather than point estimates to reflect uncertainty.

Step 2: Segment Prioritization (35 min) — Ranks customer segments by attractiveness and strategic fit using a segmentation matrix. Identifies beachhead opportunities for initial entry.

Step 3: Entry Modes (30 min) — Compares greenfield investment, acquisition, and partnership approaches with pros, cons, and capital requirements for each path.

Step 4: Financial Outlook (35 min) — Provides investment case with high-level financial model including investment range, payback period, and expected ROI projections.

The screenshot shows the Stratagem AI Pro platform interface. On the left, there's a sidebar with a logo, navigation links for Dashboard, Workspace, Prompt Library, and Settings, and a project list showing 'ACTIVE PROJECT Tech Startup Series B Strategy' and '+ New Project'. The main area is titled 'WORKFLOW Market Entry Strategy' and describes it as 'Market sizing, competitive context, and entry path evaluation.' It indicates a duration of '3-5 hours' and is categorized under 'Market Entry Strategy'. The workflow is divided into four sequential steps: 'Step Progress' (4/4), 'Market Sizing' (40m), 'Segment Prioritization' (35m), 'Entry Modes' (30m), and 'Financial Outlook' (35m). To the right, there's a 'Financial Outlook' section with a sub-section for 'Outline investment and return profile.' It shows an 'OUTPUT' box with the instruction 'Run this step to generate a structured output.' and a 'VISUALIZATION' box stating 'No chart for this step yet.' Below this is a 'NEXT STEP' section with 'Workflow complete' and an 'Advance' button. The overall layout is clean and modern, designed for easy navigation and management of complex strategic projects.

Figure 3: Market Entry Strategy workflow with 4 sequential analytical steps

The Workspace: AI-Generated Analysis in Action

The workspace is where consultants interact with the AI engine. The interface divides into three functional areas:

Business Scenario Input: Consultants describe the client situation, including timeline, stakeholders, constraints, and success metrics. This context grounds the AI analysis in client-specific realities.

Prompt Selection: Choose from 37 framework-specific prompts, each with context-aware templates enforcing MECE logic, 'So What' synthesis, and actionable recommendations.

AI Output Generation: Google Gemini 1.5 Pro generates structured analyses in real-time using streaming responses. The system implements multi-tier fallback (Gemini Pro → Gemini Flash) ensuring consultants always receive responses even during API outages.

The screenshot shows the Stratagem AI Pro Consulting Workspace interface. On the left is a sidebar with a dark header containing the company logo and name. Below the header are several navigation links: Dashboard, Workflow, Prompt Library, and Settings. The main workspace area has a light gray header with the text "ACTIVE PROJECT" and "Tech Startup Series B Strategy" followed by a "+ New Project" button. To the right of the header are two small buttons: "AI Advisor" and "Partner View". The central part of the workspace is divided into two main sections. On the left, under the heading "WORKSPACE", is a large box titled "Tech Startup Series B Strategy" which displays "1 outputs generated". Inside this box, there's a "BUSINESS SCENARIO" section containing a paragraph about a B2B SaaS company's growth and challenges, followed by a numbered list of three items. A tip at the bottom of this section suggests including timeline, stakeholders, constraints, and success metrics. On the right, under the heading "SELECT PROMPT", is another large box. It contains a "Storyline Outline" section with a "Communication" option selected, and a "Prompt details" section below it. At the bottom right of this box is a "Generate Analys" button. At the very bottom of the workspace area, there is a large, empty rectangular box with a faint watermark in the center. Below this box, the text "Ready to Generate" is displayed, followed by the instruction "Provide your scenario, choose a prompt, and generate a structured consulting analysis."

Figure 4: Workspace showing Business Scenario input and Prompt Selection interface

The Enriched Prompt Library: Encoding Strategic Expertise

The true innovation lies not in listing frameworks, but in how the prompts guide their application. Each of the 37 framework prompts embeds decades of consulting best practices:

MECE-Enforced Structure

Every prompt demands mutually exclusive, collectively exhaustive analysis. When a consultant uses Porter's Five Forces, the AI doesn't just list forces—it evaluates intensity (1-5 scale), provides evidence-based rationale, and synthesizes implications for industry profitability.

'So What' Enforcement

Junior consultants often produce descriptive analyses lacking strategic synthesis. The prompts explicitly demand 'So What' conclusions. A SWOT analysis isn't complete until it identifies top 2-3 strategic implications and recommends specific actions.

Context-Aware Templates

Each prompt template includes variable substitution allowing consultants to inject client-specific context. The AI then tailors analysis to the specific industry, competitive landscape, and strategic question—preventing generic outputs and ensuring relevance.

Business Value: Measurable Impact on Consulting Delivery

The application delivers measurable value across the consulting engagement lifecycle:

Accelerated Analysis Delivery

A comprehensive strategic assessment traditionally requiring 8-12 hours of senior consultant time can now be completed in 4-6 hours. This isn't cutting corners—it's eliminating the 3-4 hours consultants spend structuring their approach and drafting initial analyses. The AI handles structural heavy lifting; consultants focus on interpretation, validation, and client-specific customization.

Consistent Analytical Rigor

Junior consultants now produce analyses with senior-level structure and completeness. The prompts prevent common mistakes: incomplete PESTLE analyses skipping Environmental factors, SWOT analyses without 'So What' synthesis, or Porter's Five Forces assessments lacking competitive intensity ratings. This consistency reduces review cycles and improves deliverable quality.

Embedded Learning

The enriched prompts serve as implicit training. When junior consultants use Pre-Mortem Analysis, they learn what questions senior consultants ask: 'What could cause this strategy to fail spectacularly? What early warning indicators would signal trouble?' This accelerates professional development by exposing consultants to best-practice analytical approaches.

Real-World Application: Tech Startup Series B Strategy

A B2B SaaS company (\$2M to \$18M ARR in 3 years) approaches the consulting team for Series B fundraising strategy (\$40M target). The company faces investor pressure on multiple fronts: sales cycle lengthening (45 → 90 days), well-funded competitor launches, and NRR decline (130% → 115%).

Hour 1-2: External Analysis — The team uses PESTLE to assess macro forces and Porter's Five Forces to evaluate competitive intensity. AI identifies regulatory tailwinds (data privacy creating barriers to entry) and intensifying rivalry (3 new entrants with \$50M+ funding).

Hour 3: Internal Assessment — SWOT analysis synthesizes strengths (strong SMB traction, 250K+ users), weaknesses (limited enterprise features, sales cycle friction), opportunities (upmarket expansion, product-led growth), and threats (competitive pressure, churn risk).

Hour 4: Strategic Options — AI generates 3 strategic paths: (1) Double-down on SMB with PLG motion, (2) Accelerate enterprise with sales-led expansion, (3) Hybrid approach with tiered offering. Compares options on value upside, risk, and feasibility.

Hour 5-6: Recommendation — Executive Summary framework delivers final recommendation (Hybrid approach) with top 3 supporting arguments, top 3 risks, and 30/60/90 day implementation roadmap. Exported to PowerPoint for investor presentation.

Result: **Board-ready strategic recommendation delivered in 6 hours vs traditional 2-week timeline, with senior-level analytical rigor throughout.**

Technical Architecture: Built for Enterprise Consulting

Stratagem AI Pro was architected for enterprise consulting environments where reliability, performance, and data security are non-negotiable:

Modern React Architecture

Built on React 18.2 with TypeScript 5.3 for type safety and developer productivity. Zustand 4.5 manages application state with localStorage persistence, ensuring consultants don't lose work when switching tabs or experiencing connectivity issues during client site visits.

Google Gemini 1.5 Pro Integration

The AI engine uses Gemini 1.5 Pro with streaming responses for real-time feedback. Multi-tier fallback architecture: if Gemini Pro fails, gracefully degrades to Gemini Flash. This resilience ensures consultants always receive responses even during API outages.

Export to Client Deliverables

Analyses export to PowerPoint (PPTX), Word (DOCX), or PDF formats—critical for client-ready deliverables. The export engine preserves formatting, tables, and visualizations, allowing consultants to seamlessly integrate AI-generated insights into presentations.

Future Evolution: The Roadmap Ahead

Stratagem AI Pro represents the foundation of an intelligent consulting ecosystem. Future enhancements under consideration:

Custom Framework Builder

Allow firms to encode proprietary frameworks and methodologies. A firm with specialized digital transformation approaches could create custom prompt templates embedding unique IP, making the tool a force multiplier for firm-specific expertise.

Industry-Specific Workflow Libraries

Expand beyond generic strategic assessment to industry-tailored workflows: Healthcare Market Entry (regulatory analysis, reimbursement modeling), Financial Services Digital Transformation (legacy system assessment, regulatory compliance), Manufacturing Operations Excellence (lean diagnostics, supply chain optimization).

Collaborative Workspaces

Enable multi-user engagement teams to collaborate on shared analyses with version history, alternative option comparison, and contribution tracking across team members.

Knowledge Graph Integration

Connect to firm knowledge management systems to automatically surface relevant past engagements, industry benchmarks, and proprietary research when consultants run analyses, amplifying firm institutional knowledge.

Advanced Visualization Engine

Auto-generate client-ready charts, strategy maps, and decision trees from AI analyses —eliminating manual formatting work consuming hours of analyst time.

Conclusion: Augmented Intelligence for Strategic Work

Stratagem AI Pro doesn't replace the consultant—it amplifies their capabilities. The frameworks remain the same proven tools guiding strategic decisions for decades. What changes is the *speed and consistency* with which consultants apply them.

The real value lies in democratizing senior-level analytical approaches. A consultant with 2 years experience can now produce work with the structural rigor of a 10-year veteran, not because the AI is smarter, but because it encodes pattern recognition only coming from repetition.

This is augmented intelligence in action: humans set strategic context, interpret nuances, validate assumptions, and make final recommendations. The AI accelerates analytical heavy lifting, ensuring no critical dimension is overlooked and every analysis meets professional standards.

For consulting firms, implications are profound: **faster engagement delivery, more consistent quality, accelerated junior consultant development, and ability to tackle more complex strategic challenges in compressed timeframes.** Stratagem AI Pro represents a new category of professional tooling—one that doesn't automate thinking, but structures and accelerates it.

Technical Stack: React 18.2, TypeScript 5.3, Zustand 4.5, Google Gemini 1.5 Pro, Recharts 2.12, TailwindCSS, Vite 5.0

— *End of Case Study* —