



# holistic leadership: coaching & ai

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## a human-first approach to leveraging artificial intelligence

How you think about AI and its role in your future advisory practice will directly impact the results you create for yourself and your firm. You can either choose to think that AI is something to be feared, avoided, or dismissed because it's taking jobs, is unethical, difficult to understand, unreliable, and lacks human connection...

OR

You can choose to embrace AI as a way to enhance your human-first approach by supporting your team, increasing your knowledge, maximizing your efficiency, elevating your creativity, reducing your errors, automating your processes... you get the point. The financial services firms that will stand the test of time will fully integrate AI into their business, not just leverage it as a way to amplify their marketing.

The following is a guide to help you think more creatively as you embed AI into your practice. We hope you share this resource with others who may still be wondering how AI could be used in their advisory firm.



# best practices

MODEL  
R-12

01 ◦

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# be specific

Use clear and specific keywords in your commands to ensure the AI understands exactly what you want it to generate.

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◻ 02

# provide context

Give relevant information, context, and role guidance to support the AI's generation process. This can help the AI produce more accurate and relevant outputs.

03 ◦

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# experiment with variations

Try different command formulations or prompts to see how the AI responds. Explore different wordings or approaches to get the desired output.

04

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# refine and iterate

If the AI doesn't generate the desired result initially, refine and iterate your commands. Adjust the instructions, keywords, or context to improve the AI's understanding and output.

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05

# understand ai capabilities

Familiarize yourself with the capabilities and limitations of the AI model you're working with. This will help you craft commands that align with what the AI can effectively generate.

The background features a dark blue and black color palette. A large, semi-transparent silhouette of a human head is positioned on the left side, facing right. The interior of the head and the surrounding space are filled with intricate digital and network motifs. These include glowing blue and white nodes connected by thin lines, forming a complex web. There are also circular patterns, some resembling orbits or data paths, and various geometric shapes like hexagons and squares. Faint binary code (0s and 1s) is scattered throughout the background, adding to the technological atmosphere. The overall effect is one of advanced technology and human cognition.

# human-first prompts

01 ◦

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# self coaching

"Ask me questions that will help me uncover what might be causing me to feel [feeling] with [situation]."

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◻ 02

# employee development

"I am having challenges with an employee. They [explain issue]. Create a 90-day development plan that will help to improve this employee's skill set and correct the underlying issue."

03 ◦

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# client coaching

"I have a client that [explain situation]. Develop a list of open-ended questions to help me understand the client better while avoiding my own biases or missing anything due to blind spots. Please explain what each question should help me to understand."

04

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# business consultant

"I'd like you to act as my business consultant to help me devise our firm's annual business plan. Please ask me questions and go back and forth with me to help create a compelling and actionable business strategy."

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05

# sales coach

"I am going to be meeting with a new prospect [explain what makes this prospect unique or different from past prospects] and would like to role-play what questions they might ask me about our business and process."

06

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# goal development

"We are looking to grow our firm by [insert lagging performance metric]. Please create 3 leading indicator metrics that we need to track to support our goal."

07 ◦

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# recruiting

"Please design 5 open-ended interview questions to help us hire [insert role]. This position must be able to [insert most important responsibilities and qualities]. Our past hires have struggled with [insert issues]. Please also include questions to help us determine if they embrace our firm values of [insert values]."

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◻ 08

# client experience

"We want to develop a human-first client experience to surprise and delight our ideal client persona of [insert key details about your ideal client]. Please provide a list of 10 things that would elevate our experience."

09 ◦

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# difficult conversations

"My business partner [or insert who you are having trouble with] has been [insert behavior or action that you are having a hard time with], and I'm trying to figure out the best way to approach them so that they hear my concerns but don't feel attacked. Please role-play some scenarios to help me anticipate how this conversation might unfold."

Contact our team to learn more about how we can help  
you build the human-first advisory firm of the future.

# Our Coaching Initiative

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