

Run your entire consulting firm — not just your projects

ClientPulse joins client development, engagement delivery and firm financials in one system. AI does the preparation; you stay in control of every decision that leaves the building.

Client & pipeline CRM

- Contacts, companies and deals in one place, with a full activity timeline per client.
- Voice-first entry — dictate a new client or meeting note between calls.
- Email and LinkedIn outreach tracks, each step logged to the client record.

CP Intelligence — safe AI outreach

- Turn a LinkedIn profile into a researched, four-email sequence in minutes.
- Confidentiality engine: every historical claim must trace to an approved, externally permitted proof point — anything else is blocked and labeled.
- Approved Company Messaging library keeps voice, sender identity and claims consistent.

Project Command Center

- Engagements with phases, tasks, milestones and deliverables in one workspace.
- Weighted completion engine: system-calculated progress alongside the Engagement Manager's official assessment.
- RAID log with owned, dated actions and escalation.

Meetings → approved action

- First-class meeting records with AI extraction of tasks, risks and decisions.
- Nothing executes until the Engagement Manager approves; superseded proposals are retained for audit.
- Status reports generated from live project data, not memory.

Time, billing & financial health

- Rate cards, time entries and expenses roll straight into invoices and collections.
- Live margin per engagement — know before the margin is gone, not at closeout.
- Budget vs. actuals and burn tracked continuously across the engagement.

Resource capacity & forecasting

- Allocations and capacity by consultant, with over-allocation warnings.
- Forward-looking revenue and utilization forecasting across the portfolio.
- Portfolio health view: every engagement's status, risk and margin at a glance.

Human-in-the-loop by design: AI drafts outreach, extracts meeting actions and flags risk — nothing is sent, saved or executed without your approval.

Control, roles & document vault

- Roles for owner, engagement manager, consultant, contractor and client viewer.
- Row-level isolation with sensitivity-gated document vault for dec pages, SOWs and deliverables.
- Auditable history on approvals, sends and completions.

Plans

Plan	Monthly	Best for
Practice	\$149	Independent consultants and solo practices
Firm	\$399	Growing firms with multiple consultants
Enterprise	\$799	Larger practices needing full governance
Custom	Quoted	Bespoke scope and integrations

Optional modules: Advanced Project Operations \$99/mo · Resource, Capacity & Margin Intelligence \$149/mo · AI Project Intelligence \$199/mo · Finance & Billing Operations \$129/mo. All four as the Complete Consulting Operations bundle: \$299/mo — saves \$277.

Want the full detail?

The Complete Capability Guide covers all 142 features — what each one does, how to access it, and how to use it efficiently.

Download the Complete Capability Guide (PDF)

Start a 14-day trial at clientpulse.ltd/consulting