

Case study 03 · Professional services

15% of partner time back, and 9% more revenue per client in one quarter

Management consulting firm · United States · 25 people

Client follow-ups now go out the same day, proposals go out 35% faster, and partners spend more of their time selling instead of searching.

Business impact

15%

Of partner time handed back

+9%

Revenue per client from expansion work

35%

Faster proposal turnaround

90%

Of client calls followed up the same day

Time saved from the first week live

Before and after

	Before	After
Client calls followed up the same day	20%	90%
Proposal win rate	32%	38%
Partner time spent finding information	18%	6%

The problem

What the firm knew about each client was scattered across call recordings, chat threads and four AI tools. Follow-ups slipped, proposals were rebuilt from memory, and expansion opportunities were missed because nobody had the full picture.

What we changed

- One place that knows every client, available in the tools the team already uses.
- Call recaps and next steps sent automatically after every client meeting.
- Proposals start from everything the firm already knows about the client.