



## Aprio Accelerates Client-Centric Growth with Propense

**“Propense gives our partners confidence going into client conversations. It arms them with data and insights so they are not relying on hope or a hunch. It helps us put the client at the center and act on real opportunity.”**

Marc Silverman, Co-To-Market Leader, Aprio

### The Challenge

Aprio, a top 30 U.S. accounting and advisory firm, has built a broad platform of approximately 346 service offerings across industries and specialties. As the firm expanded, leadership recognized significant opportunity within its existing client base: helping partners more consistently identify and deliver the full breadth of Aprio’s capabilities.

Historically, cross-service growth relied heavily on individual partner awareness and client conversations. Teams believed additional needs existed, yet uncovering and validating those opportunities required time, multiple meetings, and manual effort. As Cheri Husney shared, it often felt more like hope than strategy.

At the same time, Aprio’s leadership was focused on evolving the firm’s growth model. To remain competitive and forward-looking, the firm needed to embrace technology, empower professionals with better insights, and make data central to business development decision-making.

A key strategic priority emerged: increase average services per client and reduce white space across accounts. Leadership knew the gap between current engagement and potential engagement represented a meaningful revenue opportunity. What they lacked was a scalable, predictive way to surface and prioritize it.

### The Solution

Aprio partnered with Propense to embed predictive analytics into its account planning and business development workflows.

Propense analyzes time and billing data, CRM information, and market triggers to identify likely unmet client needs and recommend relevant services. For Aprio, the platform became a catalyst for quantifying uncaptured revenue and operationalizing cross-service growth.

## *Industry-Aligned Rollout*

Aprio structured the rollout around its industry go-to-market model. Rather than positioning Propense as a standalone technology initiative, leadership embedded it within existing industry meetings and account planning processes.

Key components included:

- Industry-led office hour sessions focused on real client accounts
- Using Propense insights to complete and refine account plans
- Reviewing recommendations ahead of year-end and economic buyer meetings
- Setting expectations that the platform would improve through usage and feedback

Leadership emphasized practical adoption. The goal was immediate progress in identifying opportunities, with continued refinement over time.

Despite the natural resistance that often accompanies new technology in professional services, Aprio saw rapid positive engagement. Within hours of rollout, team members were sharing enthusiastic feedback about the platform's impact on their client preparation. Early visible adoption from respected partners helped accelerate broader acceptance across the firm.

## **Impact**

Propense now plays a central role in Aprio's organic growth strategy, with ROI evaluated across services per client, pipeline strength, and measurable uncaptured revenue.

## *Quantifying White Space and Revenue Opportunity*

One of the most immediate impacts was visibility. When Aprio first analyzed its client base through Propense, leadership saw significant uncaptured revenue potential across accounts. The magnitude of the opportunity created meaningful internal discussion and urgency.

Cross-serving moved from a conceptual objective to a quantified growth lever.

Aprio measures ROI in part by tracking average services per client. Leadership understands that expanding from one or two services to four, five, or six services within an account has exponential revenue impact. Each additional service:

- Expands access to new economic buyers
- Deepens trusted advisor positioning
- Increases embeddedness in the client's enterprise
- Strengthens long-term retention and revenue growth

Propense provides a systematic way to identify and prioritize these opportunities, helping reduce white space and drive measurable organic growth.

### *Stronger, More Predictable Pipeline*

Before revenue is realized, pipeline must be built. Propense strengthens Aprio's pipeline by providing forward-looking visibility into:

- Client buying patterns
- Industry-level demand trends
- Service line expansion opportunities
- Staffing and investment implications

This data-supported pipeline enables leadership to make more informed decisions about talent allocation and strategic investment, improving predictability in growth planning.

### *Higher-Confidence Client Conversations*

Prior to Propense, identifying new opportunities often required multiple exploratory discussions. Today, partners enter meetings with validated insights and relevant market triggers.

As Cheri Husney noted, partners now feel more confident walking into conversations with data to inform and guide action. This shortens the path from opportunity identification to execution and increases the likelihood of productive, value-driven discussions.

### *Strengthened Cross-Service Collaboration*

Propense also supports collaboration across service lines by providing a shared, data-backed starting point. When opportunities are surfaced through analytics, it becomes easier to engage the right subject matter experts and align around client needs.

While collaboration continues to evolve, Propense has created a common language around opportunity and client-centric growth.

## **About Propense**

Propense analyzes a firm's time and billing data, CRM information, and current events to anticipate where clients have unmet needs and recommend relevant services to introduce. Propense's clients include 14 of the top 100 U.S. accounting firms and three of the top 200 U.S. law firms.

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