



Sensiba Builds a Scalable Propense Rollout to Strengthen Cross-Service Growth

“Propense helps us showcase the full breadth of our services and use AI to pinpoint what a client is most likely to need next. It gives our teams a clear, practical way to level up client service and drive growth across the firm.”

Karen Burns, Principal, Growth Department, Sensiba

The Challenge

Sensiba is an Inside Public Accounting Top 75 firm with about 500 employees and 30 partners. After several years of strong growth and a recent acquisition in Australia, Sensiba saw an opportunity to strengthen cross-service growth by helping professionals more consistently understand and connect clients to the firm's full set of capabilities.

With expanding service lines, industry depth, and new colleagues joining through acquisition, Sensiba wanted a scalable way to identify where existing clients might benefit from additional services and to make those opportunities easy for partners and teams to act on.

Sensiba also recognized that adoption would require intentional change management. Senior professionals have heavy client responsibilities and firm deadlines. To be successful, Propense had to fit naturally into day-to-day workflows and be introduced in a structured, practical way.

The Solution

Sensiba partnered with Propense to bring time and billing and CRM intelligence into BD workflows through a phased rollout built for adoption.

The firm began with a group of roughly 20 influential service line and industry leaders. Karen Burns, a recently retired equity partner now serving as a Principal in Growth, led implementation and coordinated early subject matter expert input to ensure Propense reflected Sensiba's services and culture.

Users explored the platform and shared feedback through a centralized spreadsheet. To drive consistent engagement, Sensiba and Propense ran two guided practice

sessions per week over five weeks, where users logged in, worked in real client views, and practiced filtering by their industries and services.

Sensiba is also embedding Propense into existing routines, including reviewing recommendations ahead of client meetings, and has integrated Propense inside Salesforce so teams can access insights directly within their CRM workflow.

Impact

Sensiba has already created meaningful momentum in the firms' first rollout phase. Guided practice sessions accelerated platform fluency and confidence, with users consistently reporting that structured, hands-on sessions helped them apply Propense to real client situations quickly.

Propense has also supported stronger cross-firm collaboration, a goal of Chief Growth Officer, Nick Lew Ton, by giving teams a shared, data-supported starting point for identifying underserved client needs and engaging the right subject matter experts. Leaders are actively refining recommendation relevance through usage, marking suggestions that are not a fit, and helping improve prioritization over time.

"Our excitement about the promise of implementing Propense is to give us greater assurance that we're taking great care of our clients – whether that drives revenue to our firm or not." - John Sensiba, Managing Partner, Sensiba

Sensiba is now preparing a second rollout wave of another 20 professionals, using the same phased approach to scale adoption across the firm.

About Propense

Propense analyzes a firm's time and billing and CRM data, and current events, to anticipate where the firm's clients have unmet needs and recommend services the firm should consider introducing to better support them. Propense's clients include 14 of the top 100 U.S. accounting firms and three of the top 200 U.S. law firms. The company was founded in early 2023 and is funded by Thomson Reuters Ventures, Operator Collective, and Harlem Capital.