WHITE PAPER | 2026

From Hesitation to Action:

A Leadership Playbook for Driving Adoption of AI-Powered Growth at Professional Services Firms

How managing partners, CMOs, and CFOs can unlock measurable cross-service revenue — without disrupting partner workflows.

+9.7%	+7.2%	87%
Growth in cross-sold clients across Propense customer base	Increase in number of cross-sells year-over-year	Prediction accuracy (LBMC — 1,500 cross-sold services)

Clients include 14 of the top 100 U.S. accounting firms and 3 of the top 200 U.S. law firms. Backed by Thomson Reuters Ventures, Operator Collective, and Harlem Capital.

EXECUTIVE SUMMARY

The single biggest obstacle professional services firms face when investing in AI-driven growth tools is not budget, and it is not data quality. It is adoption. Managing partners have full schedules, established habits, and a healthy skepticism toward any technology that promises to change the way they serve clients. CFOs want measurable ROI before committing. And yet the competitive opportunity — capturing the unclaimed revenue sitting inside a firm's existing client relationships — is too significant to ignore.

This white paper lays out a practical, leadership-tested playbook for deploying Propense in a way that **generates real results without demanding behavioral change from busy partners.** Drawing on case studies from LBMC, Aprio, Bennett Thrasher, and KLR — and supported by aggregate benchmark data across Propense's customer base — we detail proven adoption models that any firm can start immediately, and walk through Propense's newest capabilities that make partner-free, frictionless deployment a reality today.

The bottom line: with the right starting model, firms see results within weeks, not quarters.

THE CHALLENGE: WHY ADOPTION STALLS

Cross-service growth has long been a stated priority for professional services leadership. Most firms know their existing client relationships represent their largest untapped revenue opportunity. The math is straightforward: moving a client from two services to four or five has an exponential impact on lifetime value, retention, and partner positioning.

Yet the gap between ambition and execution persists. When Aprio's leadership analyzed its client base prior to Propense, the firm saw significant uncaptured revenue potential across accounts — opportunity that had existed for years but was invisible without structured data and predictive intelligence. As Marc Silverman, Aprio's Go-To-Market Leader, described it: cross-service growth had long felt more like hope than strategy.

> ***"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, Go-To-Market Leader, Aprio

Leadership teams consistently cite four adoption barriers:

Partner bandwidth	Partners are billable and relationship-driven. Asking them to log into a new system, learn a new interface, or change how they prepare for client meetings rarely survives contact with a busy quarter.
Skepticism about AI recommendations	Without visible proof that recommendations are accurate and relevant, partners dismiss them. Trust is earned through demonstrated precision, not product demos.

Gap between insight and CRM action	Even when partners find a recommendation compelling, translating it into a tracked pipeline opportunity inside the CRM has historically required manual steps — creating friction that kills momentum between insight and action.
Unclear ROI path	CFOs and managing partners need to see how an investment translates into measurable outcomes — services per client, pipeline value, and ultimately revenue — before scaling a deployment.

THE OPPORTUNITY: WHAT IS AT STAKE

Propense benchmarked cross-sell performance across customers who had deployed the platform for one year or more. The results demonstrate that when Propense recommendations are incorporated into BD workflows — even partially — the impact is measurable and consistent.

+9.7%	Growth in cross-sold clients	**+7.2%**	Increase in cross-sells
+1.4%	Cross-sell rate improvement	**+0.8%**	Service line sell rate improvement

LBMC, a top 40 accounting firm based in Nashville, provides some of the most compelling evidence of recommendation precision. When Propense analyzed 1,500 cross-sold services over a two-month period, it correctly predicted the individual service that was sold for 1,300 of those transactions — an accuracy rate of 87%. For one specific consulting service sold 49 times in a single month, Propense achieved 98% prediction accuracy. Equally important: Propense's models ensured 94% of LBMC's service portfolio was represented in client recommendations, distributing growth opportunity across all practice areas without any manual configuration.

> ***"We partnered with Propense because we recognize that we need a scalable, data-driven process for anticipating our clients' needs and deploying the full breadth of our services to serve them. Propense allows us to confidently predict which of our services will likely provide the most value to our clients.***
>
> — Suzanne Reed, Chief Marketing Officer, LBMC

Aprio, a top 30 U.S. firm, frames ROI in terms of services per client. Expanding an account from one or two services to four, five, or six does not just add incremental revenue — it deepens trusted advisor positioning, expands access to new economic buyers within the client organization, increases embeddedness, and drives long-term retention. Propense provides a systematic, scalable way to pursue this expansion across every partner's book of business, not just the most growth-minded ones.

NEW IN 2026: ACTIONS & INSIGHTS

In March 2026, Propense released two foundational capabilities — **Actions** and **Insights** — that fundamentally change the adoption equation. These features make it possible for marketing and BD teams to run a full cross-service growth motion on behalf of partners, surfacing opportunities, generating real-time context, and delivering ready-to-send communications directly to partner inboxes. Partners do not need to log in. They do not need to learn a new system. The work comes to them.

Actions	Generate a complete Business Development Plan for any client in seconds. The plan includes a data-driven rationale for the recommended service, real-time market context pulled from current news and events, and a draft email ready to send. Delivered directly to the partner's inbox for review — and with one click, pushed directly into the CRM as a tracked pipeline opportunity, bridging the gap between insight and action instantly.
Insights	Real-time news analysis tied to each client and recommendation. Before a partner walks into a meeting or picks up the phone, Insights surfaces the external triggers — funding events, acquisitions, regulatory changes, industry shifts — that make a service introduction timely and relevant right now. Partners arrive informed, not guessing.

These capabilities mean a BD manager or CMO can now run a full growth sprint for a partner's book of business in a single morning — without requiring a single minute of partner time until the opportunity is ready to act on.

THREE WAYS TO DRIVE ADOPTION — START WHERE YOU ARE

There is no single right way to deploy Propense. The firm's size, culture, and existing tech stack will shape the best starting point. The three models below are each designed to generate immediate value while minimizing disruption to partner workflows — and each answers the same core question: **how do we get partners to act on these insights?**

Step 1 | Centralized BD — Marketing & Growth Team-Led

Ideal for firms that want to demonstrate value quickly and support partners without requiring any system access on their part. A BD or marketing team member runs the entire workflow and delivers the output directly to the partner.

- → Filter Propense to a target partner's book of business.
- → Review the partner's top 10 clients and highest-ranked recommendations across them.
- → Select 2–3 opportunities with strong fit and a compelling real-time trigger from Insights.
- → Use Actions to generate a Business Development Plan — rationale, market context, and a draft email.
- → Send the BD Plan directly to the partner's inbox. The partner reviews, decides, and acts. No login required.
- → Optionally push the opportunity into the CRM with one click to create a tracked pipeline record.

Step 2	Agentic Delivery — Hatfield Integration

Propense's agentic layer with Hatfield monitors each partner's book of business continuously and proactively pushes relevant opportunities as they emerge — without waiting for a BD team member to initiate the workflow.

→ Hatfield continuously monitors client accounts for compelling events: funding rounds, acquisitions, leadership changes, regulatory shifts.

→ When a trigger event aligns with a high-propensity recommendation, the system automatically drafts client-specific context and suggested email copy.

→ The partner receives a push notification or email with ready-to-use content and a one-click option to create a CRM opportunity.

→ Nothing slips through the cracks — high-value moments are caught and surfaced automatically, every time.

Step 3	CRM-Embedded — Inside the Tools Partners Already Use

For firms using Dynamics, HubSpot, or Salesforce, Propense surfaces recommendations directly within the CRM via an embedded iframe. Partners see insights in the context of the accounts they are already managing — with no separate login and no new application.

→ As a partner reviews an account or moves a deal through the pipeline, Propense's top recommendations appear in context.

→ Clicking a recommendation reveals the rationale and current market triggers without leaving the CRM.

→ A BD Plan can be generated and a pipeline opportunity created with a single click — from insight to tracked action in seconds.

→ Adoption happens naturally, as part of an existing workflow, not as a separate initiative.

HOW SERVICE LINE LEADERS DRIVE ADOPTION

Service line leaders are often the most effective champions for Propense adoption — because they have both the authority to set expectations and the incentive to grow their practice. Propense gives service line leaders a purpose-built workflow that requires no partner mandate and delivers immediate strategic value.

The Service Line Leader Workflow:

Filter to your service line.

In Propense, filter the recommendation view to your specific service or practice area. This surfaces every client across the firm that has a high-propensity recommendation for your services — instantly and without manual research.

Identify the top opportunities.

Review the ranked list of opportunities by confidence score, client size, or partner assignment. Propense shows you which clients are most likely to need your services right now, and why — drawing on their engagement history, peer behavior, and live market triggers.

Map clients to partners.

For each top opportunity, identify the relationship owner. This becomes the foundation of a cross-serving road map: a structured view of which partners should be having which conversations, and in what order.

Build the cross-serving road map.

Use the filtered output to create a prioritized action plan for the quarter — identifying the highest-value accounts, the services most likely to land, and the partners best positioned to introduce them. Share this road map in your next service line meeting and assign owners to each opportunity.

Track progress over time.

As partners act on recommendations and new engagements are added to the time and billing system, Propense updates its models. Service line leaders gain a living, dynamic view of their growth pipeline that improves with every interaction.

This workflow requires no firm-wide rollout. A single service line leader can begin building their cross-serving road map in one sitting — and use it to drive focused, data-backed conversations with the partners in their group.

EMBEDDING PROPENSE INTO YOUR MEETING CADENCE

One of the most practical and immediately actionable ways to drive adoption is also the simplest: bring Propense into the meetings you are already having. No separate training session, no change management program — just a standing agenda item that creates accountability and surfaces opportunities consistently.

Monthly Partner Meetings	At each monthly one-on-one or small group partner meeting, pull up Propense and review the top recommendations for that partner's book of business. Walk through the highest-priority opportunities together, discuss which clients are most ready, and assign who will take the next step. Follow up the following month to review what actions were taken and what results came from them.
Service Line Meetings	Use the service line filter to surface the top cross-serving opportunities relevant to that group's practice. Review the road map, assign owners to the highest-priority clients, and track which opportunities have moved into the pipeline since the last meeting. Visibility and accountability compound over time.
Firm-Wide BD Reviews	At quarterly or annual BD reviews, use Propense's aggregate data to show pipeline strength across service lines, the volume of opportunities acted on, and the resulting impact on services per client and cross-sell rate. This is the layer where CFOs and managing partners see the ROI in measurable terms.

The firms that sustain long-term adoption share a common habit: they make reviewing Propense recommendations a standing part of how leadership talks about clients. When it becomes part of the rhythm, it stops being a tool people have to remember to use — and starts being the lens through which growth conversations happen.

CLIENT EVIDENCE: FIRMS LEADING THE WAY

Aprio | Top 30 U.S. Accounting Firm

Aprio embedded Propense into its industry-aligned go-to-market model, using insights to prepare for economic buyer meetings and year-end account reviews. Within hours of rollout, partners were sharing enthusiastic feedback about the platform's impact on their client preparation. Today, Propense plays a central role in Aprio's organic growth strategy, with ROI tracked across average services per client, pipeline strength, and quantified white-space reduction.

LBMC | Top 40 Accounting Firm

LBMC's results are among the most quantified in Propense's client base: 87% overall prediction accuracy across 1,500 cross-sold services, 98% accuracy for a specific high-volume consulting service, and 94% of the firm's service portfolio represented in recommendations without any manual model tuning. Cross-department collaboration improved as recommendations averaged three service lines per client — naturally requiring different teams to coordinate.

Bennett Thrasher | IPA Top 100 Firm

Bennett Thrasher's growth team now uses Propense as the first stop for any client intelligence question. The platform allows the team to generate highly specific filtered client lists — for example, each partner's single-service audit clients in a specific industry above a revenue threshold — enabling BD discussions grounded in data rather than intuition.

KLR | IPA Top 100 Firm

KLR worked with Propense to retroactively classify every client engagement since 2022 under a more granular engagement hierarchy — unlocking a deeper foundation for predictive recommendations. Propense identified engagement types the firm had been providing but not specifically tracking, giving leadership a materially clearer picture of client relationships and enabling far more targeted service recommendations going forward.

ADDRESSING LEADERSHIP OBJECTIONS

The following addresses the most common concerns raised by managing partners, CFOs, and firm leadership during the evaluation process.

"Our partners won't use a new system."	With centralized deployment and agentic delivery, partners never need to log in. The BD or marketing team generates insights and BD Plans on their behalf. Partners receive a polished, ready-to-act email — their only job is to decide whether to send it.
"We don't have time to train the firm."	Propense requires no model training and no lengthy implementation. LBMC described it as delivering immediate impact from day one. The platform reads existing time and billing data — no new data entry, no change management program required.
"How do we know recommendations will be relevant?"	LBMC validated 87% prediction accuracy across 1,500 real cross-sold services. Propense's models are trained on your firm's own engagement history, client similarity patterns, and live market triggers — not generic benchmarks. Recommendations improve as the firm uses and provides feedback on the platform.

"What's the ROI, and when will we see it?"	Propense customers see measurable impact within the first year: +9.7% growth in cross-sold clients, +7.2% increase in cross-sells. Aprio tracks ROI through average services per client — a metric leadership can monitor from day one.
"We already have a CRM. Why add another tool?"	Propense integrates directly with Dynamics, HubSpot, and Salesforce. Partners see recommendations inside the systems they already use, and can create a tracked pipeline opportunity with one click — from insight to CRM record in seconds, without any separate workflow.

YOUR FIRST SPRINT: WEEK ONE IN PRACTICE

The most effective way to build internal momentum is to start small, demonstrate value quickly, and let results do the persuading. Here is a recommended first sprint that any marketing or BD team can run in week one — requiring no partner training, no firm-wide rollout, and no system integration.

Step 1 — Pick one partner.	Choose a growth-oriented partner with a mid-size book of business. Filter Propense to their accounts.
Step 2 — Identify the top 10.	Review the top 10 clients in that partner's book and the top recommendations across those accounts.
Step 3 — Select 2–3 opportunities.	Pick opportunities where service fit is strong and Insights shows a compelling real-time market trigger.
Step 4 — Generate a BD Plan.	Use Actions to produce a complete Business Development Plan — rationale, market context, and a draft email.
Step 5 — Deliver to the partner.	Send the BD Plan to the partner's inbox. They review and decide. Optionally create a CRM opportunity with one click.
Step 6 — Track and expand.	Follow up the next month on what actions were taken. Use outcomes to refine the approach and expand to additional partners.

CONCLUSION

The firms winning the cross-service growth race are not the ones that have convinced every partner to change their behavior. They are the ones that have built a centralized, intelligence-driven infrastructure that supports partners wherever they are — in their inbox, in their CRM, or in a brief conversation after a partner meeting.

With Propense's newest capabilities — Actions, Insights, agentic delivery, and CRM embedding — there has never been a lower-friction path to measurable cross-service growth. The adoption challenge has been fundamentally redesigned: partners do not need to change how they work. The intelligence meets them where they already are.

The question is no longer whether your partners will adopt. It is whether your marketing and BD team is ready to start surfacing the opportunities that are already waiting inside your client relationships.

Ready to see it in action?

Contact your Propense representative or visit propense.ai to schedule a personalized walkthrough of Actions, Insights, and the centralized BD workflow.