

THE OPERATING SYSTEM FOR PROFESSIONAL-SERVICES FIRMS

ProServiceWorld

One governed workspace for clients, engagements, matters, documents, compliance, time and billing — so a firm stops running itself on six systems that do not talk to each other.

CLIENTS & ENGAGEMENTS

MATTERS & DOCUMENTS

TIME & BILLING

COMPLIANCE & CONFLICTS

GOVERNED AI



Pre-launch. Launching 2026, waitlist open. Every capability in this document is described with its real maturity.

proserviceworld.com

01 The short version

ProServiceWorld is the system a professional-services firm uses to run itself — every client, every piece of work done for them, every hour and every invoice held in one governed record.

Firms whose product is expert judgment — legal, accounting, tax, advisory, consulting, finance and insurance practices — almost all run their business the same way: a contact database for clients, a case or job system for the work, a shared drive for documents, a timer for hours, a billing tool for money, and a conflicts process that lives in somebody's head. Each tool is fine. The seams between them are where the margin goes.

ProServiceWorld replaces the seams with one model. A client is a continuous record rather than a row in a database. An engagement is the commercial container the firm actually sells — scope, fee arrangement, milestones, deliverables and a staffed team. A matter is the professional container inside it, carrying the deadlines, the privilege and the conflict scope that regulated work demands. Time, documents, invoices and compliance checks all hang off those two things, so the work and the money and the record of both stop being separate exercises.

The part most platforms bolt on afterwards is built into the shape here: a conflict check and an acceptance decision are records the firm can produce years later, not a hallway conversation. And the honest framing matters — ProServiceWorld is pre-launch. Some of what follows is live in the web experience today, some is in progress, and some is designed and ticketed. This document says which is which every time.

THE PROMISE

One governed record of the firm — from first contact to final invoice, with the compliance evidence attached.

What it changes

1

One system of record

The client, the engagement, the matter, the document, the hour and the bill live in a single governed place rather than six that need reconciling.

5+

Practices on one model

Legal, accounting, tax, advisory and consulting work share the same client, practice-area, engagement and matter spine instead of a stitched stack of single-vertical tools.

Free

A genuine entry tier

A zero-cost plan for a solo practitioner with the full domain model, roles and audit — not a crippled trial that hides the product behind a sales call.

Day 1

Governance inherited

Single sign-on, role-based access, multi-tenant isolation, audit and file governance come with the platform rather than arriving in a later release.

Who it is for

Independent professionals and solo practices

One platform instead of five subscriptions, and the operational credibility of a much larger firm — a documented acceptance step, a proper invoice, a record you can produce on request.

Accounting, tax and audit firms

Recurring filings and periodic reviews on a schedule, independence requirements as tracked obligations, structured document collection from clients, and engagement quality control that is a gate rather than a habit.

Small and mid-size firms of two to fifty

Shared client records, consistent engagement delivery, conflict checking and partner-level visibility without taking on enterprise-system overhead or an implementation project.

Finance, wealth advisory and insurance practices

Client books, fiduciary obligations, recurring reviews and licensing requirements managed as first-class records, with the relationship history and the work done against it in one timeline.

Large and multi-office practices

Governance, segregation of duties, matter-level access control and audit-grade evidence across teams, offices and jurisdictions, modelled as workspaces and organisations rather than separate installations.

Management and specialist consultancies

Outcome-based engagements with milestones, deliverables that move through a real review cycle, staffing by allocation and rate, and realisation visible against the fee arrangement that was actually sold.

Legal practices

Matters with their own deadlines and responsible practitioners, privileged document handling, conflict scope carried at the matter level, and a trust ledger for client funds that cannot be driven negative.

What breaks today

None of what follows is exotic. It is the ordinary daily friction of running a practice on tools that were never designed to know about each other — and it is expensive precisely because each individual instance looks too small to fix.

The client lives in one system, the work in another

The relationship history sits in a contact database while the actual delivery happens somewhere else, so nobody can answer what the firm has done for this client without opening three tools and trusting their memory for the rest.

- The client is a continuous record. Every engagement, matter, document, time entry and invoice hangs off it, so the relationship and the work are one timeline instead of two systems that need reconciling.

Matters and deadlines are tracked in spreadsheets and email

A statutory deadline, a filing date or a review is only as reliable as the person who remembers to update the sheet — and the sheet has no idea which documents are privileged or who is responsible.

- Matters carry their own deadlines, responsible practitioners, status, privilege flags and conflict scope, scoped to the client they belong to and surfaced on a shared calendar with reminders.

Billable time leaks before it reaches an invoice

Reconstructing a timesheet on Friday from memory rounds hours down, forgets others entirely, and produces narratives so thin the client queries the line and delays the payment by a fortnight.

- Time is captured against the right engagement or matter at the moment it happens, marked billable or not, carrying a rate and a narrative, then routed through submission and approval before anything reaches a bill.

What breaks today

Conflict checks are hallway conversations

A partner asks whether anyone sees a problem, everyone says no, and the work starts. When a regulator, an insurer or a client asks for the record two years later, there is nothing to show them.

- A conflict check is a first-class record: the parties searched, the findings, any waiver reason, who cleared it and when, with a status of pending, cleared, waived or failed — attached to the client and produceable on demand.

Nobody can say which version is final

Working papers live across email attachments, a shared drive and three people's laptops. A reviewer asks whether this is the latest draft and the honest answer is a shrug.

- Every document is filed against the client, engagement or matter it belongs to, with folders, versioning, classification from public through to privileged, tags and status — so the current version is unambiguous and the history shows what changed.

Month end is a re-keying exercise

Hours are exported from one tool, milestone amounts copied from another, and invoices hand-built in a third. It is slow, it introduces errors, and those errors are the source of most billing disputes.

- Invoices assemble from the work itself — approved time, milestone triggers and fixed-fee schedules — and move through draft, sent, paid and overdue, so the firm bills what it actually delivered.

What breaks today

You know your revenue but not your margin

Top-line numbers are easy. Whether the firm is realising the rates it set, who is under- or over-utilised, and which receivable has aged past ninety days are questions that get answered by intuition.

- Utilisation, realisation, write-offs, aged receivables and revenue trend are computed from the same records that hold the time and the invoices, so the numbers are live and drillable rather than reconstructed.

The firm's methodology lives in three people's heads

When the seniors who carry the house approach are busy — or leave — quality and consistency walk out with them, and every new engagement starts from a blank page and an improvised scope.

- Practice areas and a service catalogue define offerings once, with packages, scope, deliverables and requirements; engagement and deliverable templates that package default milestones, checklists and quality gates are on the launch roadmap.

What you get

CLIENTS

Clients, counterparties and the relationship record

Profiles for every client, counterparty and specialist the firm deals with, carrying contacts, specialisations, relationship history and engagement feedback. This is the firm's own private directory and quality memory — not a public marketplace, not a review wall.

ENGAGEMENTS

The commercial container the firm actually sells

Scope, fee arrangement — fixed, hourly, retainer or value-based — milestones, deliverables and a staffed team, advancing through a configurable lifecycle from proposal and acceptance to delivery, invoicing and acceptance, with allowed transitions and required approvals.

MATTERS

The professional container inside the commercial one

A legal matter, an audit, a tax filing, an advisory mandate or a claim, with its own deadlines, responsible practitioners, status, privilege and independence flags. One client can carry many matters, each with its own obligations. Shipping progressively as the dedicated service lands.

DOCUMENTS

Governed records and secure document rooms

Contracts, working papers, opinions and filings held against the client, engagement or matter, with folders, versioning, classification, tags and scoped sharing. Document rooms give clients one governed place to hand things over and receive outputs back.

TIME

Effort captured where it happens

Time logged against an engagement or matter in minutes with a rate, a billable flag and a narrative, then submitted and approved so only reviewed effort reaches an invoice and feeds the realisation numbers. A timer interface is on the roadmap.

BILLING

From delivered work to collected cash

Invoices assembled for a client or engagement and moved through draft, sent, paid and overdue. Subscriptions, recurring retainer billing, regional pricing and payment rails are handled by the shared platform billing capability rather than reinvented.

What you get

Nine building blocks make up the product. Each is a real entity with its own lifecycle and permissions rather than a view over a generic table, which is what lets compliance and billing behave like properties of the work instead of separate departments.

COMPLIANCE

Conditions of practice, tracked as records

Conflict-of-interest checks and compliance obligations — engagement acceptance, independence, licensing and continuing education, retention and legal hold — modelled as evidenced entities with status and resolution history, wired into the engagement lifecycle.

TRUST

Client funds held separately and provably

A trust ledger with deposits, withdrawals, trust-to-operating transfers and reconciliation. Every movement posts an immutable entry and a per-client guard makes a negative balance impossible, which is the core of what a regulated practice needs.

GOVERNANCE

Who can do what, and the proof of what they did

Role-based access scoped to the workspace, the engagement, the matter and the action, plus an immutable, exportable audit log. Permission checks run at the API edge before the service is invoked, so there is one place the rules live.

05 Put to work

Sixteen scenarios showing the platform from the seat of the person who has to use it. These are illustrative roles inside a firm working through the product as specified — ProServiceWorld is pre-launch, so none of these is an account of work already delivered, and each says plainly what is live today versus what lands with the dedicated service.

ENGAGEMENT PARTNER

Start every client relationship the same disciplined way

The relationship is one timeline from first contact, and the firm can show precisely when it decided to take the work and on what terms.

DELIVERY LEAD

Run an engagement the way the firm actually sold it

The commercial reality of the engagement and the state of the work stay in lockstep, so nobody bills a milestone that has not actually been delivered.

MANAGING PARTNER

See the health of every engagement on one screen

Leadership runs the firm from a command centre instead of a monthly reconciliation exercise, and the answer to how things are going is a screen rather than a project.

PRACTICE DIRECTOR

Staff the work with the right people at the right rate

An over-committed associate or an under-used specialist becomes visible before it turns into a delivery problem, and the rates on each assignment feed straight into how the engagement is billed.

MATTER LEAD

Give regulated work the discipline it actually requires

Professional discipline becomes a property of the matter rather than a habit that depends on who happens to be running it.

AUDIT MANAGER

Keep every working paper as a governed record

The document store stops being a liability and starts being part of the record the firm can defend.

ENGAGEMENT COORDINATOR

Collect and deliver through a governed document room

An awkward email back-and-forth becomes a clean, evidenced exchange that both sides can point at later.

SENIOR ASSOCIATE

Capture every billable hour at the moment it happens

Hours stop being reconstructed and start being recorded, which is the difference between a bill the client pays and a bill the client queries.

05 Put to work

BILLING MANAGER

Assemble the invoice straight from the work

The firm bills what it actually delivered, time-to-cash tightens, and whether an invoice ever went out stops being a question anyone has to ask.

FINANCE PARTNER

Know your realisation, not just your revenue

Whether to raise rates, and which engagements are quietly losing money, become data-backed decisions rather than partner intuition.

ACCOUNTING PRACTICE LEAD

Put recurring work on rails

The compounding obligations of a practice become a managed, visible cadence instead of a memory exercise with a quarterly failure rate.

COMPLIANCE OFFICER

Make the conflict check part of the lifecycle

The firm can show, on every new engagement, that it checked, decided and approved before work began — with names and dates attached.

PRACTICE RISK LEAD

Keep every licence and CPE requirement current

A lapsing credential becomes a warning the firm receives in advance rather than a finding somebody else makes.

RECORDS & GOVERNANCE LEAD

Retain and dispose of records defensibly

Record management moves from a belief that things were probably handled correctly to a posture a regulator and a client can both rely on.

FIRM ADMINISTRATOR

Govern who can do what, and prove it afterwards

Who approved that engagement, and who opened that privileged file, become lookups rather than investigations.

PRACTICE MANAGER

Ask the assistant to work the screen you are already on

The navigation tax disappears without the firm handing privileged text to an assistant in order to remove it.

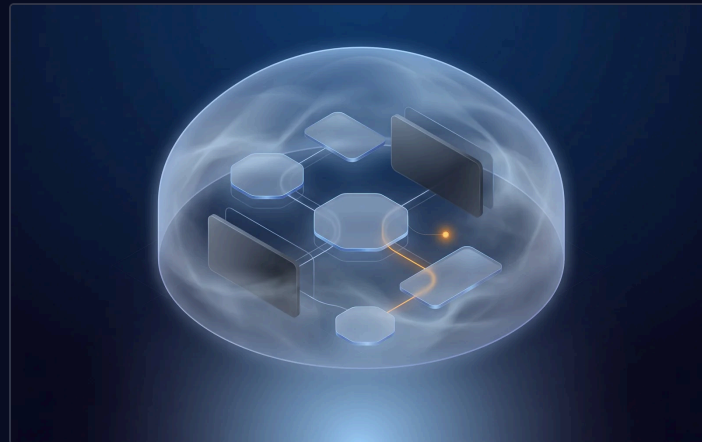
06 Built AI-native

An assistant that works inside privilege, not around it

In a professional-services firm most facts are privileged, conflict-sensitive or billable — three categories where a confident guess is considerably worse than no answer at all. That constraint shapes every design decision here. ProServiceWorld does not treat AI as a feature bolted to the side of a practice-management product; it treats the firm's own governed record as the thing the AI is allowed to work on, and the firm's own permissions as the boundary it works inside.

The mechanism is deliberately unglamorous. The assistant is told which screen you are on and which record is open — a page, a record type and an identifier — and nothing about what that record says. It discovers what the product can currently do from the live product itself rather than a hand-written list, so a capability released this week is usable immediately and one withdrawn stops being offered. When it acts, it takes the same route a person takes, and the same permission check runs first. There is no elevated path that exists only for automation, and no shared machine account: from an outside AI client you sign in as yourself.

The judgment work — conflict triage, engagement health, bill readiness, drafted time narratives — is designed, ticketed and explicitly marked roadmap rather than sold as shipped. That is the honest position, and it is also the defensible one: a conflict finding is a professional-conduct decision that has to be reproducible months later, which is why the design puts deterministic matching over the firm's own records first and model reasoning second. What ships today is grounding, reach and accountability. What is coming is judgment, and it will arrive as proposals on records a person still clears.



06 Four pillars



One firm record, not six systems

Clients, engagements, matters, time, invoices, documents, compliance and client funds sit in one place, so an answer cannot quietly disagree with the firm's own books. Grounding here means looking something up, not guessing at it.



The assistant is you, with your permissions

It signs in as you and inherits exactly your roles. There is no shared machine account and no way for it to open a matter you cannot open, whether it is working inside the product or driving it from your own AI client.



Privilege-aware by design

It is told where you are, never what is inside. Client names, matter titles, findings and time narratives are not in the context that travels with a question — and they are stripped again before anything reaches the audit history.



Metered today, reversible next

Every request checks the firm's AI credit before it runs and reports what it consumed afterwards. A confirmation step and a documented undo are still missing — planned and ticketed, not claimed as shipped.

06 What the AI can actually do

An assistant on every screen of the firm

Ask from the dashboard, clients, engagements, matters, time, invoices, trust accounting, compliance, conflict checks, documents, practice areas, analytics, signatures or the client portal.

Shipped. It travels with the product, so wherever you already work is where you ask — there is no separate AI destination to navigate to.

Forty-one permission-checked ways to look things up

Clients, engagements, matters, deliverables, milestones, staffing, time, invoices, documents, compliance and conflict checks, practice areas, trust accounts and signature requests, all filterable.

Shipped. It runs the same lookups your own screens run, and only the ones your role is allowed to run.

It knows which record you are looking at

Across eighteen screens — eight record views and ten lists — you can say this matter or these invoices without pasting an identifier.

Shipped. It is told the screen and which record is open, and nothing at all about what that record contains.

Sixteen live practice numbers it can quote

Active clients and engagements, open matters, billed and unbilled hours, outstanding and collected invoices, pending checks, revenue by month, client funds held.

Shipped. The figures are computed from your records at the moment you ask, so they are counted rather than estimated.

It picks up new abilities as they ship

The assistant carries no hand-written list of what the product can do; it checks the live product each time you ask.

Shipped. Something released this week is usable straight away, and something withdrawn stops being offered rather than failing oddly.

Twenty-three firm tools inside your own AI client

Clients, engagements, matters, invoices, time, compliance and conflict checks and practice areas are callable from any protocol-capable AI client.

Shipped. You sign in as yourself from your own client, so it can do exactly what you can do and nothing more.

What the AI can actually do

Grounding references for outside agents

Read-only references — the domain schema, the client directory, the matter list and the firm's practice areas — so an agent can learn the firm's actual vocabulary.

Shipped. An agent that knows your nouns asks better questions than one improvising from a generic template.

Governed changes, with the undo half still missing

Anything the assistant changes is permission-checked, kept inside the firm's workspace and written to a redacted history. There is no confirmation step, no documented undo and no marker distinguishing assistant-made changes.

In progress. Today you get proof of what happened; the ask-first and roll-back halves are being built, not claimed.

Two guided firm workflows

Client onboarding walks create the client, check for unresolved conflicts, pick the practice area, open the engagement and the first matter, then activate.

Engagement delivery walks review, advance, log time, confirm no blocking check, invoice, mark paid.

Shipped. These are the sequences a firm actually follows, written down where an agent can follow them too.

A firm playbook for the assistant

A written guide teaching the assistant how your firm actually works — acceptance before work, which checks gate an invoice, what your people mean by work in progress.

Roadmap. Until it lands, ask in plain professional terms rather than internal shorthand; it reasons from the domain, not your slang.

Every request metered before and after

A request checks the firm's AI credit before it runs and reports what it consumed afterwards.

Shipped. No credit, no request — and what each one costs is attributed back to the firm rather than surfacing as a surprise at renewal.

06 In progress and on the roadmap

Find the matters that resemble this one

Describe a matter in your own words and get the nearest past ones back, rather than trying to express the question as a filter.

Roadmap. It also requires settling how privileged text may be searched at all, which is a policy question before it is a technical one.

Bill readiness and drafted time narratives

Raise the lines a client will query — thin narratives, hours past a fixed-fee cap, a rate contradicting the engagement, work on a matter with an open check — and draft the wording.

Roadmap. A draft would be grounded in what the engagement records for that day and offered for you to accept, edit or reject; it would never post one on your behalf.

Conflict triage before you accept

Match the parties being searched against every client, counterparty, matter and staffed team the firm already holds, rank what comes back, and explain each hit in a sentence a partner can read.

Roadmap. It will draft a finding onto the check you already opened; clearing or waiving it stays with a person.

A watch loop that runs on a schedule

A scheduled sweep with plain filters first, an AI budget check per firm, findings deduplicated, thresholds you set, and off until you switch it on.

Roadmap. It will send what it noticed to the right person; the loop itself will never change a record.

Engagements that are quietly going wrong

Surface what only shows up between screens — five weeks sitting in review, sixty hours unbilled against it, an unresolved check on its matter.

Roadmap. Deterministic filters run first so a quiet week costs nothing, and a model only ranks and explains what the filter already found.

06 What keeps it in bounds

Permissions checked before anything runs

All ninety operations in the domain are permission-checked at the API edge before the service is invoked, and no assistant route skips that check. The service never validates a token or re-implements authorisation itself, which is exactly what makes agent access safe to reason about.

The agent inherits your roles, and only yours

An agent carrying your identity gets precisely your reach. It cannot read a privileged matter you cannot read, and it cannot write something your role cannot write. There is no service account and no privileged path that exists only for machines.

The context boundary is a route and an identifier

What travels with a question is fixed: the screen, the kind of record open, and that record's identifier. There is no slot for a client's name, a matter title, a document's contents, a finding or a time narrative — the boundary is structural, not a filter someone remembered to apply.

Privilege-aware audit redaction

Every change is recorded with a preview of what went in, redacted before it is stored. Credential-shaped keys go first, then contact names, emails, phone numbers, addresses, notes, titles, descriptions, references, searched parties, findings, waiver reasons and time narratives.

Privileged records are redacted to their identifiers

When the record itself is marked privileged or confidential — a privileged matter, a document classified as privileged — every other text field on it is stripped too, leaving only structural identifiers. An audit history outlives the record it describes, so it must not become the one place privileged text lives forever.

Workspace isolation enforced in storage

Every record belongs to exactly one firm's workspace, enforced at the storage layer as well as in the product, so an identifier belonging to another firm is not merely forbidden but unreachable.

06 What keeps it in bounds

A blunt off switch, honestly described

Every change sits behind a workspace-scoped operations flag and every page behind its own flag, so a firm can stop writes or hide a surface without waiting for a release. What that flag cannot yet do is tell an agent from a human — it stops both. An agent-specific policy switch is still ahead.

Credit checked before, usage reported after

Each turn checks the workspace's AI credit balance before it runs and reports the tokens it consumed afterwards, so AI is a line the firm can see and attribute rather than an unexplained cost at renewal.

No model or provider key inside the product

Requests run on the shared platform AI runtime, which selects a provider from keys the platform holds. There is no model picker and no bring-your-own-key today, and the firm's data is not used to train, tune or index anything.

Destructive tools are not yet confirmation-gated

State-changing tools — archiving a client, closing a matter, advancing an engagement, marking an invoice paid — are properly authorised but carry no are-you-sure contract and no documented undo. An agent that misreads an instruction can complete a real state change in one call. This is ticketed, and until it lands the tools deserve to be pointed deliberately.

No cross-run ledger yet

There is no record of what an agent proposed, which model produced it, what it cost and what it changed, held across runs. It depends on the shared platform agent runtime landing first. Today's story is strong on authorisation and provenance and thin on reversibility, and it is fairer to say that in this order.

A reviewable decision surface is designed, not built

The planned AI operations console would show each run's inputs, its proposal, the model that produced it, its cost, and an explicit approve or dismiss — so a firm could audit its AI the way it audits an associate. The product reserves the route today; the surface is on the roadmap.

06 Reachable from, and in numbers

REACHABLE FROM

- The in-app assistant, reachable from every firm screen rather than a separate AI page
- Record views for clients, engagements, matters, invoices, documents and compliance and conflict checks
- List views across the dashboard, time, trust accounting, practice areas, analytics and signatures
- The client portal, within the permissions that portal grants
- Any protocol-capable AI client through the firm tools server, signed in as a real person
- Guided onboarding and delivery walkthroughs exposed to outside agents as named workflows
- Read-only grounding references — domain schema, client directory, matter list, practice areas
- The command-line tool and the Node and Python SDKs, for scripted and automated access
- The planned AI operations console, where a proposal becomes a reviewable decision
- The planned firm-cadence watch loop, running on the platform workflow automation

IN NUMBERS

- Twenty-three firm tools exposed to outside AI clients, grouped into per-entity sub-APIs plus a health probe
- Twenty-one shared platform modules alongside them, covering files, tags, conversations, notifications, export, permissions, scheduling, organisations and billing
- Forty-one permission-checked read operations across the firm domain
- Ninety operations in total, every one permission-checked at the API edge
- Sixteen live practice figures computed from the firm's own records rather than estimated
- Eighteen screens that carry page-and-record context to the assistant
- Two guided firm workflows written down for agents: client onboarding and engagement delivery
- Four grounding references published read-only: domain schema, client directory, matter list, practice areas
- Zero model keys and zero provider credentials held inside the product itself
- No bring-your-own-key and no model picker today — both are honest gaps rather than omissions

WHAT THE AI DOES NOT DO TODAY

What the AI does not do today is the judgment. There is no model, provider or embedding wired into the product's own domain service — conflict findings, bill-readiness flags and time narratives are written by your people, and the machine versions are designed, ticketed and waiting on the shared platform AI runtime. There is no confirmation step before a destructive agent action, no documented undo at the agent boundary, no marker distinguishing an assistant-made change from a human one, and no cross-run ledger of what was proposed, by which model, at what cost. There is no firm-specific playbook yet, so the assistant reasons from the domain's own vocabulary and is weakest with internal shorthand. The write switch that stops an agent stops your people too. And there is no published AI policy covering provider terms and retention — that is planned. If AI-authored professional judgment is what you are buying, this is not yet that product; if a permission-bounded, privilege-aware assistant over one governed firm record is, it is.

07 Who does what

Six firm roles ship with defined permissions across the nine resource types the domain owns. Each is scoped to the responsibilities the job actually carries, so access matches accountability rather than seniority.

Managing Partner

Portfolio health, realisation, and whether the firm can defend its decisions

Runs the firm and answers for it — owns the client relationships, the practice areas, the engagement economics and the compliance posture of the whole practice.

- Full control of clients and engagements
- Set compliance and conflict policy
- Full control of matters and documents
- Approve time and invoices
- Configure practice areas
- Review the audit trail end to end

Engagement Lead

Delivery against scope, staffing, and getting the engagement billed

Owns delivery on the engagements and matters they run — scopes the work, staffs the team, drives milestones and deliverables, approves time and raises invoices.

- Full control of their engagements
- Edit client records
- Full control of their matters
- Approve and edit time entries
- Manage engagement documents
- Raise and edit invoices

Practitioner

Getting the work done and the hours recorded before they are forgotten

The fee earner doing the work — logs time against engagements and matters, produces and revises deliverables and working papers, and moves matters forward.

- Log and edit their own time
- Create and revise documents
- Edit assigned engagements
- View client records
- Edit assigned matters
- View practice areas

Who does what

Compliance Officer

Whether the firm can prove it checked before it acted

Guards the conditions of practice — runs conflict checks before work is accepted, resolves independence, licensing and continuing-education obligations, and applies legal hold and retention.

- Full control of compliance checks
- Full control of conflict checks
- Record findings and waivers
- Apply and release legal hold
- Read clients, engagements and matters
- Cannot alter delivery records

Billing Coordinator

Time-to-cash, and invoices that do not come back queried

Turns delivered work into cash — reviews and approves billable time, assembles invoices, and tracks the sent, paid and overdue book.

- Full control of invoices
- Review and approve time
- Assemble from milestones
- Track sent, paid and overdue
- View clients and engagements
- No access to firm governance

Practice Auditor

A complete, unaltered record they can attest to

Reviews the firm's records for regulators, clients or internal quality control — reads engagements, matters, time, invoices and compliance evidence, and changes nothing.

- Read-only across the domain
- Read compliance evidence
- Read the audit trail
- Export records for review
- No write access anywhere
- No configuration rights

08 Under the hood

ProServiceWorld is API-first. The firm domain — clients, engagements, deliverables, milestones, team assignments, matters, time entries, invoices, documents, compliance and conflict checks, practice areas, trust accounts and signature requests — is exposed as a single federated GraphQL API, and every surface the product ships talks to that same API. The web experience has no private back door, which is why an assistant or an outside agent can be given exactly the reach a person has without inventing a second security model.

Authorisation is answered at the edge. Every query and mutation carries a permission directive, and the API gateway enforces it from the composed schema before the service is ever invoked. The service does not validate tokens and does not re-implement authorisation — identity arrives from the gateway, already checked. That single property is what makes the permission story short enough to actually verify: there is one place the rules are enforced, and every caller goes through it.

The product does not rebuild what a platform should provide. Identity and single sign-on, role-based access, multi-tenant isolation, file storage and signed access, conversations, tagging, notifications, scheduling, billing and payment rails, internationalisation, accessibility, audit and export all come from shared platform capabilities. What ProServiceWorld builds is the professional-services domain: the engagement and matter semantics, the compliance obligations, the trust ledger and the realisation model that no generic platform is going to supply.



THE SPLIT THAT MATTERS

Domain semantics are owned here; commodity infrastructure is not. Documents are ProServiceWorld records — matter linkage, classification, privilege, retention — while the bytes and the signed, expiring access live in the shared file capability. Invoices are ProServiceWorld records — assembled from time, milestones and fee arrangements — while subscriptions, regional pricing and payment rails live in the shared billing capability. One system of record per concept, and no concept implemented twice.

08 Capability by area

Domain API

One federated GraphQL API covering the whole firm domain, discoverable at runtime so a client picks up new operations as they ship rather than working from a stale copy. Ninety operations, every one permission-checked.

Audit and evidence

Every mutation recorded with actor, target and result, searchable and exportable, with a redaction pass that strips credentials, contact details, free text and — on privileged records — everything but the identifiers.

Authorisation

Role and policy-based access evaluated at the gateway before the service runs, scoped to the workspace, the engagement, the matter and the action. Six firm roles ship with defined levels across nine resource types.

Events and automation

Cross-module reactions flow through a durable event stream rather than point-to-point calls, and scheduled work — deadlines, recurring filings, periodic reviews, reminders — runs on the shared scheduling capability.

Multi-tenancy

Every record belongs to exactly one firm's workspace, enforced at the storage layer as well as in the product. Multi-office and multi-entity practices are modelled as workspaces and organisations inside the tenant.

Quotas and metering

Plan limits are enforced at the point of creating a client, an engagement or a matter rather than discovered afterwards, and AI credit is checked before each request with usage reported after.

Documents and files

Folders, versioning, classification from public to privileged, tags, status and scoped sharing, with every fetch a signed, expiring, audited link through the shared file capability.

Feature control

Every mutation sits behind a workspace-scoped operations flag and every page behind its own flag, so a firm can enable a surface gradually or stop writes entirely without waiting for a release.

08 Standards and integrations

OPEN STANDARDS IT SPEAKS

- GraphQL with a federated schema across the firm and platform domains
- OpenID Connect single sign-on against your existing identity provider
- OAuth 2.0 device-code flow for command-line tools and editors
- OAuth 2.0 client credentials for machine-to-machine automation
- API keys and developer tokens issued through a developer portal
- Model Context Protocol for AI clients, with tools, resources and prompts
- Webhooks for deadline, approval and status events
- CSV and JSON export for reporting and migration
- Internationalised UI with locale-aware dates, numbers and currency, and right-to-left support
- Accessibility practice — keyboard navigation, a command palette, screen-reader semantics and a high-contrast theme

PLUGS INTO

- Your identity provider, through single sign-on from the first login
- Any Model Context Protocol client, through the firm tools server signed in as a real person
- Node and TypeScript codebases, through the official typed SDK
- Python pipelines and notebooks, through the async SDK with token refresh and retry
- Terminal workflows and CI, through the command-line tool
- Your editor, through the code extension for engineering-heavy advisory practices
- Your browser, through a side panel for capture and lookup while you work elsewhere
- Webhook consumers, for approvals, deadlines and status changes
- Your reporting or BI tool, through CSV and JSON export — coverage still expanding
- Accounting, CRM and document systems through a connector framework — on the roadmap, not shipped

How it deploys

Shared multi-tenant

The default. Strict per-firm isolation enforced in storage and in the product, with no configuration required from the firm.

Dedicated tenancy

An Enterprise option for firms whose regulator, insurer or client contracts require isolation beyond a shared tenant.

Data residency

An Enterprise option on the roadmap rather than a shipped capability. Ask before you assume a particular jurisdiction is available.

Self-host

Discussed for Enterprise and grouped with advanced governance on the later roadmap. Not available today, and it would be wrong to imply otherwise.

Web first, surfaces after

The web experience is the primary surface for the 2026 launch. Desktop, mobile, command line, SDKs and extensions roll out through and after it.

09 Security & trust

The controls below are the ones the platform enforces and ProServiceWorld inherits, plus the domain-specific handling a privileged practice needs. Where something is planned rather than live, it says so — the compliance posture is stated in full underneath.

Role-based access on every operation

Permissions govern every query and mutation and are applied consistently across the whole platform, so the rules are the same everywhere for every actor rather than re-implemented per feature.

Enforcement at the API edge

The gateway checks the permission directive from the composed schema before the service is invoked. The service never validates a token, which removes the most common class of authorisation drift.

Workspace isolation by default

Every client, engagement, matter, document, time entry and invoice belongs to exactly one firm's workspace, enforced at the storage layer as well as in the product.

Matter- and engagement-level access control

Access is scoped to the workspace, the engagement, the matter and the action rather than being all-or-nothing, so privileged work is visible only to the practitioners responsible for it. The matter layer lands with the dedicated service.

Encryption in transit and at rest

All traffic is served over TLS, and data at rest is encrypted on managed database and storage services.

Centralised secret management

Secrets live in a per-environment managed secret store, never in source code, and each environment reads only its own.

Immutable audit log

Every consequential action is recorded with actor, target and result, and the log is searchable and exportable for regulators, insurers and clients.

Privilege-aware audit redaction

Audit previews are redacted before storage: credential-shaped keys first, then contact details, notes, titles, descriptions, references, searched parties, findings, waiver reasons and time narratives — and on a privileged record, every remaining text field.

09 Security & trust

Signed, expiring, audited file access

Every document fetch is a scoped, time-limited link through the shared file capability, and each request lands in the audit trail alongside the document it touched.

Feature flags as a control surface

Every mutation sits behind a workspace-scoped operations flag and every page behind its own, so a firm can stop writes or hide a surface without waiting for a release. The switch is blunt: it stops people as well as agents.

Document classification and privilege

Documents are classified from public through internal and confidential to privileged, and matters can themselves be flagged privileged, so access follows the sensitivity of the work product rather than folder conventions.

Secure development practice and disclosure

Dependency and container scanning, secret scanning and security review run in the build pipeline, and responsible-disclosure reports go to security@proserviceworld.com.

Trust ledger integrity

Client funds are held separately from operating funds, every deposit, withdrawal and transfer posts an immutable ledger entry, and a per-client guard makes a negative balance impossible.

Signature audit trail

Requesting, viewing and signing a document is recorded in an append-only trail alongside the document's content hash, so a signature can be evidenced rather than asserted.

STATED PLAINLY

ProServiceWorld holds no security certifications today. SOC 2 Type II and ISO 27001 are both planned and targeted post-launch, which means that at the moment the honest answer to a certification question is a roadmap rather than a report — if your procurement process requires an attestation before signature, say so early and we will tell you where the programme actually stands rather than pointing at a badge. Data handling is designed to be GDPR-aligned, with data-subject requests, consent handling and cross-border considerations inherited from the platform, but alignment is not certification and the two should not be conflated. On the product side, several controls a regulated firm will ask about are on the launch roadmap rather than live: retention schedules, legal hold and disposition, the matter-level privilege layer, and the compliance-obligation engine covering independence, licensing and continuing education. The trust ledger, the audit trail, workspace isolation, permission enforcement at the edge and privilege-aware redaction are built. Finally, the AI governance gaps are stated in full in the AI section and are real: no confirmation step before destructive agent actions, no documented undo, no cross-run agent ledger, and no published AI policy covering provider terms and retention.

One product, many front doors

The web experience is the primary surface for the 2026 launch, and the rest of the family is built around the same API. Statuses below are honest: the product is pre-launch, so most surfaces are built or scaffolded rather than generally available, and it matters which.

Web app

The full console — dashboard, clients, engagements, matters, documents, messaging, time, billing, compliance, analytics and administration — in any modern browser. The primary surface for the 2026 launch.

Client portal

A governed view for the client into their own matters, invoices and public documents. A practitioner grants an existing platform user portal access to one client record; the self-service email-invite signup flow is not built.

Firm tools server for AI clients

Twenty-three firm tools, four grounding references and two guided workflows, callable from any Model Context Protocol client. Authentication is a device-code login as a real person — no service account, no shared key. Distributed with the product's ecosystem tooling ahead of general availability.

Command-line tool

Terminal-native access to clients, engagements, matters, time, billing and compliance for scripts, CI and partners wiring the platform into existing systems. An early scaffold rather than a shipping surface.

Node and TypeScript SDK

Typed, promise-based access to the full domain for automation and partner integrations from any Node or Bun project. Scaffolded, general availability at launch.

Python SDK

A fully async SDK with multiple auth flows, automatic token refresh and retry with backoff, for data pipelines, notebooks and finance or compliance integrations. Requires Python 3.10 or later. Scaffolded, general availability at launch.

One product, many front doors

Code extension

Clients, engagements, matters and time entries beside your code, for engineering-heavy advisory and software-enabled consulting practices. Part of the 2026 launch plan.

Browser extension

A side panel for quick access to clients, matters, time entries and approvals while you work in mail or document tools, capturing time and linking evidence in a click. Part of the 2026 launch plan.

Desktop app

A native console for macOS, Linux and Windows with offline drafts and system notifications, auto-updating to each release. Planned; downloads publish when the build ships.

Mobile apps

Native iOS and Android apps to review matters, capture time, approve work and respond to client requests, with offline drafts and biometric authentication. In development as part of the 2026 launch.

Documentation

Guides, tutorials and API and SDK reference at docs.proserviceworld.com, published at launch alongside the changelog and roadmap.

Community hub

Question-and-answer and discussion, signed in against your workspace identity, with a templates showcase and user stories. Planned.

FREE

\$0

Trying ProServiceWorld, or a solo practitioner just starting out.

- One team seat
- Three active clients
- Ten engagements per month
- Two concurrent matters
- The full domain model — clients, engagements, matters, documents, billing
- Role-based access, audit and multi-tenancy included
- The same API, SDK and command-line surface as every other plan

SOLO

Independent professionals with a steady client base.

- Everything in Free, with real working limits
- Higher client, engagement and matter allowances
- More storage for documents and deliverables
- Pricing announced at general availability
- Founding-member pricing offered to the waitlist

PRACTICE

Small firms of two to twenty-five collaborating across shared clients.

- Shared client records across the team
- Team staffing with roles, allocation and rates
- Conflict checks and the client portal
- Pooled quotas across practitioners
- Pricing announced at general availability

FIRM

Mid-size and multi-office practices.

- Matter-level access control
- Deeper compliance coverage
- Realisation and utilisation reporting
- Higher quotas across the board
- A service-level agreement
- Pricing announced at general availability

ENTERPRISE

Custom

Large and regulated firms with procurement, governance and residency requirements.

- Custom governance and segregation of duties
- Dedicated tenancy
- Data residency options — on the roadmap, not shipped
- Self-host discussed, grouped with later governance work
- Premium support
- Talk to us before assuming a specific control is available

11 How the commercials work

One subscription per firm. There is no commission, no escrow and no per-transaction take — ProServiceWorld is not a marketplace and does not take a cut of what you bill your own clients. Paid-tier pricing is not finalised and will be published before general availability; quoting a number now would be inventing one.

No commission, ever

The firm pays a subscription and nothing else. ProServiceWorld is not a payment processor, an escrow agent or a marketplace, and takes no percentage of the fees you bill your own clients. There is no listing step and no platform-run matching to migrate into.

Add-ons rather than forced upgrades

Extra seats, storage, AI capacity, dedicated tenancy, compliance packages and premium support are bought as add-ons, so a single constrained limit does not push a firm onto a whole plan it does not need. The catalogue and its pricing publish at general availability.

Regional pricing and tax

Prices are shown before tax unless stated, and the final price depends on your billing country, tax rules and payment method. Web billing is the canonical price; a mobile app-store purchase may show a higher one with platform fees included.

Discounts, stated as intentions

Annual billing will carry a discount, and standing programmes for students, non-profits and professional associations plus a referral scheme are planned. Exact rates and terms are announced at general availability rather than promised now.

12 Why teams choose it

Multi-vertical on one model, not five separate products

Legal, accounting, tax, advisory and consulting work share the same client, practice-area, engagement and matter spine. Every named alternative is single-vertical or a generic services-automation tool, which is why firms doing more than one kind of work end up stitching a stack together.

Compliance is in the lifecycle, not in a folder

Conflict checks and compliance obligations are first-class records with status, evidence, waivers and resolution history, wired into acceptance rather than run alongside it. Most alternatives stop at trust accounting or have no conflicts engine at all.

The engagement is a first-class thing

Not a project with a fee field bolted on. Scope, fee arrangement, milestones, deliverables and a staffed team, moving through a lifecycle with allowed transitions and required approvals, with a completed milestone able to trigger the matching invoice.

A trust ledger that cannot go negative

Client funds held separately from operating funds, with deposits, withdrawals, trust-to-operating transfers, reconciliation and a per-client guard on the balance. This is the core of what regulated practice requires, shipped rather than deferred.

The matter is separate from the engagement, deliberately

An engagement is the commercial container; a matter is the professional one, carrying deadlines, privilege, independence and conflict scope. Collapsing the two is what forces regulated firms into workarounds on generic tools.

12 Why teams choose it

Governance inherited, not deferred to version two

Single sign-on, role-based access, multi-tenant isolation, audit, file governance, notifications, tagging, scheduling, internationalisation and accessibility arrive with the platform, so the team builds professional-services semantics rather than plumbing.

Status stated honestly, per capability

Every capability in the product's own material carries a real status, and the roadmap names where competitors currently lead. A vendor that tells you what it has not built yet is easier to plan a migration around than one that does not.

AI grounded in one record, bounded by your roles

Because the client, the engagement, the matter, the time and the invoice are one governed record, an assistant can look things up rather than guess — and because it inherits your permissions exactly, giving it reach does not mean giving it a back door.

An entry tier that is actually usable

The free plan carries the full domain model, roles and audit with real if small limits, rather than hiding the product behind a demo. Add-ons raise a single constraint instead of forcing a whole-plan upgrade.

Privilege-aware from the context boundary inward

The assistant is told the screen and the record identifier and nothing about the contents, and the audit history is redacted before storage. Very few practice platforms have had to think about what an immutable log does to privileged text; this one has.

Honest answers to hard questions

You are pre-launch. Why would we bet a practice on this?

You should not bet a practice on anything without knowing what exists. That is why every capability here carries a status and why the roadmap names where competitors lead today. The realistic shapes are a pilot on a practice area, a parallel run alongside your current system, or a waitlist place with founding-member pricing while the launch surfaces complete. If you need a mature legal-only or accounting-only suite in production this quarter, buy one — and revisit when your second vertical makes that stack expensive.

Some of what you describe is roadmap. Which parts are actually live?

The client and counterparty directory, engagement and project surfaces with milestones, deliverables and team, documents with versioning and classification, the service catalogue, bookings and the shared calendar, invoice and payment surfaces, analytics, the trust ledger, e-signature with an audit trail, the client portal, role-based access and audit, the in-app assistant with page-and-record context, and the firm tools server for outside AI clients. The matter layer, the lifecycle engine, invoice assembly from time and milestones, retention and legal hold, licensing and continuing-education tracking, and all AI judgment features are in progress or on the roadmap.

We are a legal firm. Does a multi-vertical product mean a compromised legal product?

It is a fair worry and the honest answer is that breadth costs depth in places. What is shared is the spine — client, practice area, engagement, matter — and what is specific sits on top: privilege and independence flags, conflict scope, the trust ledger, retention and legal hold. Where a legal-only suite is ahead today is in years of jurisdiction-specific workflow and integration depth. Where this is ahead is that a firm doing legal plus advisory or tax does not need two systems and a reconciliation habit.

Our conflict-checking obligations are serious. Is an automated check trustworthy?

There is no automated check today, and that is the point worth being clear about. What exists is the record: parties searched, findings, waiver reason, who cleared it and when, with a status and a full resolution history. The triage that cross-matches parties against the firm's own history is designed and ticketed, and its design puts deterministic search over your records first and model ranking second precisely so a finding is reproducible months later. The human always clears or waives.

12 Honest answers to hard questions

We cannot let an AI touch privileged material.

The context boundary is structural rather than a policy someone applies. What travels with a question is the screen, the kind of record open and its identifier — there is no field for a client name, a matter title, a document's contents, a finding or a time narrative. Reads still run under your permissions, so nothing reaches you that you could not open yourself. And the audit history is redacted before storage, with privileged records stripped to their identifiers, because an immutable log outlives the record it describes.

What stops an agent doing something destructive?

Authorisation does, and reversibility does not. Every agent action is permission-checked at the edge and inherits exactly your roles, and a firm can stop all writes with a workspace flag. But there is no confirmation step before a destructive tool call, no documented undo, and no marker distinguishing an assistant-made change. Those are ticketed and not yet built. Until they are, treat the agent as powerful and point it deliberately — and note that the write switch stops your people too.

You have no SOC 2 or ISO certification.

Correct. Both are planned and targeted post-launch. The controls a certification would test — permission enforcement at the edge, workspace isolation enforced in storage, encryption in transit and at rest, centralised secret management, an immutable exportable audit log, signed and expiring file access, dependency and secret scanning in the build — are in place, but controls in place are not the same as an auditor's report and it would be dishonest to blur that. If procurement needs an attestation before signature, tell us early.

12 Honest answers to hard questions

Migrating a firm's history is the part that kills projects.

It is, and there is no migration service to point at yet. What exists today is export in CSV and JSON with coverage still expanding, and the same API every surface uses, so a scripted import is possible through the SDKs or the command-line tool. A connector framework for the accounting, CRM and document systems firms already run is on the later roadmap. For a phased entry, the practical route is to start new engagements in the platform and leave closed history where it is.

Your pricing has blanks in it.

It does, and the blanks are deliberate. The free tier is real and its limits are the ones actually enforced — one seat, three active clients, ten engagements a month, two concurrent matters. Solo, Practice and Firm pricing is not finalised, and publishing a number we might change would be worse than an honest gap. Enterprise is custom because governance, tenancy and support shapes vary too much to list. Annual, non-profit and referral discounts are intended and their rates publish at general availability.

What happens if we outgrow it, or want to leave?

Data comes out in CSV and JSON, and the same federated API that runs the product is available to you through the SDKs, the command-line tool and the developer portal — there is no private interface the vendor keeps for itself. Export coverage is still expanding and is not yet a full reporting surface, which is the honest limitation. The commercial answer is simpler: there is no commission and no transaction lock-in, so leaving costs you a migration and not a revenue share.

Where it sits against the alternatives

VS LEGAL PRACTICE-MANAGEMENT SUITES

They are ahead today on jurisdiction-specific workflow depth, integration ecosystems and years of production hardening, and a legal-only firm may well be better served by one this quarter. ProServiceWorld's angle is the firm that is not only legal: the same client, engagement and matter spine covers advisory, tax and consulting work, with conflict checks and compliance obligations as first-class records rather than trust accounting plus a spreadsheet.

VS ACCOUNTING AND TAX PRACTICE PLATFORMS

They own recurring compliance calendars and accounting-package integration in a way this does not yet match, and one of them leads the market on AI practice intelligence today while ProServiceWorld's judgment features are explicitly roadmap. The angle here is billing depth and governance: invoices assembled from time, milestones and four fee arrangements, plus a conflicts and independence model that most accounting platforms simply do not have.

VS GENERIC PROFESSIONAL-SERVICES AUTOMATION TOOLS

They are mature at resource planning and portfolio reporting, and their project model is genuinely good at what it does. But it is a project model — no matter semantics, no privilege, no independence, no conflict scope, no trust ledger. A regulated practice ends up encoding professional obligations as custom fields and conventions, which works right up until someone asks for the evidence.

Where it sits against the alternatives

VS ASSEMBLING A BEST-OF-BREED STACK YOURSELF

Each individual tool in a stack is usually better than the equivalent module in any suite, including this one, and swapping any single piece is easier. The cost is the seams — the re-keying, the reconciliation, the questions that need three systems to answer, and a compliance story assembled by hand. This is a bet that one governed record beats six good integrations for a firm that bills its own judgment.

VS GENERIC PROJECT TRACKERS AND SHARED DRIVES

They are cheap, familiar and impossible to argue with on adoption, and for a two-person practice they may be entirely adequate. What they cannot do is tell you which draft is final, evidence that a conflict was checked before work began, capture the hour at the moment it happened, or produce an audit trail a regulator will accept. The cost is invisible until the day someone asks for proof.

VS A DOCUMENT SYSTEM BOLTED ONTO A CONTACT DATABASE

The pairing gets you further than people expect, and it is where a large share of firms genuinely are today. The gap is that neither half knows about the work: documents are not filed against a matter with a privilege classification, the client record does not carry the engagement's fee arrangement, and no part of it knows what has been billed. Realisation stays invisible because nothing holds the time and the invoice together.

START TODAY

See whether it fits your practice

ProServiceWorld is pre-launch and launching in 2026. The most useful next step is a conversation about which parts of your firm it can carry today, and which parts are still on the roadmap.

- Join the waitlist for early access and founding-member pricing when the paid tiers are published
- Book a walkthrough tailored to your practice area — legal, accounting, tax, advisory, consulting, finance or insurance
- Start on the free tier to work the model end to end with one seat, three clients and two concurrent matters
- For Firm and Enterprise shapes — custom governance, dedicated tenancy, residency or self-host — talk to us before assuming a control is available

WEBSITE AND WAITLIST

proserviceworld.com

JOIN THE WAITLIST

proserviceworld.com/waitlist

DOCUMENTATION

docs.proserviceworld.com

SALES AND ENQUIRIES

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ProServiceWorld

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