



ProServiceWorld

ProServiceWorld gives professional firms one governed record for clients, engagements, matters, time and billing — with compliance built in.

PARTNER
CHEAT SHEET
PROSERVICEWORLD.COM

Clients & engagements

Matters & privilege

Time to invoice

Conflicts & compliance

Trust accounting

WHAT IT IS

Practice-management platform running a professional firm's clients, engagements, matters, documents, time, billing and compliance on one record.

30-SECOND PITCH

Firms run on six disconnected tools; the seams leak margin and risk. ProServiceWorld puts clients, engagements, matters, hours, invoices, trust money and conflict checks on one governed record, across legal, accounting, tax and advisory.

PROBLEM WE SOLVE

- Client in the CRM, work elsewhere
- Billable hours lost before invoicing
- Conflict checks done from memory
- Six tools, no shared record

VALUE PROPOSITION

- One record, not six integrations
- Compliance travels with the work
- One platform across professions
- Time to cash as one flow

IDEAL CUSTOMER

Five to fifty fee earners, regulated work, two disciplines, outgrowing a single-profession tool

Not a fit: No clients, no matters, no billable hours

WHO YOU ARE TALKING TO

Managing partner — Can you prove that conflict cleared?

Engagement lead — How many places to raise one invoice?

Compliance officer — Where does that clearance record live?

Billing manager — How many invoice lines came back queried?

TOP USE CASES

- Onboard a client, clear conflicts
- Run an engagement to invoice
- Open a privileged, deadline-bound matter
- Log time, approve it, bill
- Reconcile client trust funds

CAPABILITIES

- Client record
- Engagement lifecycle
- Matters and privilege
- Milestones and deliverables
- Time approval
- Invoice assembly
- Trust accounting
- Conflict checks
- Compliance obligations
- Practice dashboard

PRICING

Free	\$0
Solo	Contact us
Practice	Contact us
Firm	Contact us
Enterprise	Contact us
Free plan live; paid tiers quoted, never guessed	

COMPETITIVE LANDSCAPE

Clio — Legal only; compliance stops at trust accounting

Karbon — Accounting only; no conflicts, thin billing

TaxDome — Tax only; annual upfront per seat

BigTime — Generic projects; no matter, no privilege

WHY US

- One model across every professional discipline
- Engagement owns the matter and money
- Conflicts and obligations are auditable records
- Assistant inherits your permissions, not more

PROOF & CREDIBILITY

- Free plan runs a real practice today
- Six seeded roles, permissions checked upstream
- Website publishes what is not built

DEMO

Free workspace in minutes, or book twenty minutes with Vignesh

TALKING POINTS

- Not a software problem, a seams problem
- Every alternative serves one profession only
- Compliance you can produce, not remember
- Nothing bills until somebody approves it

OBJECTION HANDLING

"No price on your website"

Free plan is genuine; paid tiers quoted, not invented

"You are too new"

Run one live matter free for a fortnight

"Send your certification report"

None yet; certification targeted post-launch, said plainly

DISCOVERY QUESTIONS

- How many systems between winning and invoicing?
- Does the firm practise more than one discipline?
- Where is your conflict-check record kept?
- How much worked time never reaches invoices?
- Do you hold money for clients?

SPOT A GOOD OPPORTUNITY

- Two disciplines, two separate practice tools
- Conflict checks recorded nowhere at all
- Holds client money, reconciled manually
- Partner cannot answer practice-health questions
- Court e-filing is requirement number one
- Certification report is a procurement gate

HOW TO INTRODUCE US

"There is one system for your clients, matters, hours and compliance — early, free to try, honestly documented"

LEAD HANDOFF

Firm name, size, disciplines, current tools, the pain quoted, decision-maker

PARTNER COMMERCIALS

10 to 15 percent of first-year collected net subscription

USEFUL LINKS

ProServiceWorld website

proserviceworld.com

Sign in or create a workspace

app.proserviceworld.com/login

Documentation docs.proserviceworld.com

Use-case stories by role

proserviceworld.com/use-cases

Head-to-head comparisons

proserviceworld.com/vs

TALK TO US

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