



SALES & PARTNER PLAYBOOK

ProServiceWorld

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

Clients & engagements

Matters & privilege

Time to invoice

Conflicts & compliance

Trust accounting

PREPARED BY

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Ltd.

PRODUCT

proserviceworld.com

BOOK A CALL

calendly.com/vignesh-burdenoff/1-1



00 How to use this playbook

Read the cheat sheet before a meeting and this playbook before a serious conversation. The sections you will use most are the discovery questions, the opportunity signals, and the objection handling — they are written to be said out loud, not summarised. Where a capability is not yet shipped this document says so plainly; use that honesty rather than working around it, because prospects in regulated professions check.

IN A HURRY

Read sections 01–03 and 18. That is enough to recognise an opportunity and open a conversation.

BEFORE A MEETING

Add 06–08, 10 and 16 — who buys, what they buy, what it costs, and what they will push back on.

HANDING OVER A LEAD

Sections 19–22 tell you exactly what to send, to whom, and what you earn for it.

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01 Product Overview

PROSERVICEWORLD.COM

ProServiceWorld is the system a professional-services firm uses to run its own business. A client is a continuous record; an engagement is the commercial container with its scope, fee arrangement, milestones, deliverables and staffed team; a matter is the regulated professional thread inside it, with deadlines, privilege and its own access rules. Time logged against that work becomes an invoice, documents are classified and retained against the record they belong to, and conflict and compliance checks gate the work rather than sitting beside it. It is a single-sided product: the firm runs its own clients, and the platform never sits between the firm and the people it serves.

CATEGORY

Practice-management and firm-operations platform for professional-services firms across legal, accounting, tax, audit, finance and wealth advisory, insurance, and management consulting.

WHERE IT STANDS TODAY

Generally available, with a free plan live today and paid tiers still to be published. The product is young: it has no public reference customers, and several capabilities that incumbents lead on — court and tax-authority integrations, resource and capacity planning, mobile applications, and the judgment half of the AI work — are on the roadmap rather than shipped.

HOW CUSTOMERS GET IT

Cloud, multi-tenant, with each firm's workspace logically isolated. A firm signs up on the free plan and starts entering real work the same day; there is nothing to install. Dedicated tenancy and data-residency options are offered to larger and regulated firms and are agreed per deal. Regional pricing bands cover India and international markets, and invoicing runs through the appropriate contracting entity for the buyer's region.

Web application — the full product, in any modern browser

Client portal — a governed view for the client into their own matters, invoices and shared documents

In-product AI assistant, available on every screen and aware of the record you have open

MCP server — firm tools callable from an AI client, under the caller's own permissions

Data export in CSV and JSON

Command line, Node and Python libraries, and browser and editor extensions — early, not yet published

Mobile and desktop applications — planned

02 One-Line Pitch

SAY EXACTLY THIS

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

SHORTER, FOR A CHAT MESSAGE

One system of record for the whole firm — work, money and compliance.

THE CATEGORY SENTENCE

ProServiceWorld is a practice-management platform for professional-services firms — legal, accounting, tax, audit, advisory, insurance and consulting.

03 30-Second Elevator Pitch

SPOKEN, ROUGHLY 30 SECONDS

"Most professional firms run on six systems that do not talk to each other: a CRM for clients, a practice tool for the work, a drive for documents, a timer, a billing system, and a spreadsheet for conflicts. ProServiceWorld replaces that with one governed record. The client carries its engagements, the engagement carries its matters, deliverables, hours and invoices, and a conflict check has to clear before work begins. Legal, accounting, tax and advisory all run on the same model, in one workspace."

IF THEY ARE TECHNICAL

The whole firm domain — clients, engagements, matters, deliverables, milestones, staffing, time, invoices, documents, trust accounts, compliance and conflict checks — is one federated API with a permission directive on every field, enforced at the gateway before the service is reached. Identity, role-based access, audit, file storage and billing are inherited platform services rather than re-implemented, and an assistant or external agent signs in as a real person and inherits exactly that person's roles.

IF THEY ARE A BUSINESS BUYER

A firm's margin leaks in the seams between its tools: hours never billed, conflicts checked from memory, deadlines living in a spreadsheet, and a partner who cannot answer how the practice is doing without opening five systems. ProServiceWorld closes those seams by putting the client relationship, the work, the hours, the bill and the compliance record in one place. One subscription replaces a stack of single-vertical tools that each cover a slice of the practice.

04 Problem We Solve

These are the complaints you will actually hear when you ask a partner or a practice manager what their week looks like. Each one is a seam between two systems that do not share a record.

The client lives in one system and the work lives in another

Who feels it: Managing partner, relationship partner, practice manager

What it costs them: Client details are re-keyed into every tool, nobody trusts any single list, and answering a simple client question means opening three applications and reconciling them.

How ProServiceWorld answers it: The client record is the spine. Every engagement, matter, document, time entry, invoice and compliance check hangs off it, so the relationship history and the delivery history are the same timeline rather than two copies that drift.

Billable hours leak before they reach an invoice

Who feels it: Fee earners, billing coordinators, finance partner

What it costs them: Timesheets get reconstructed on a Friday from memory, hours are rounded down or forgotten, and the firm quietly writes off margin it already earned.

How ProServiceWorld answers it: Time is logged against the specific engagement or matter with a rate, a narrative and a billable flag, then moves through submit and approve. Invoices assemble from approved entries, milestone triggers and the fee arrangement, so what reaches the bill is reviewed and traceable.

Conflict checks are a hallway conversation

Who feels it: Compliance and risk officer, engagement partner

What it costs them: When a client, an insurer or a regulator later asks for the record of what was checked before the firm took the work, there is nothing to show but somebody's recollection.

How ProServiceWorld answers it: A conflict check is a real record on the client — the parties searched, the findings, any waiver reason, who cleared it and when — and it moves through pending, cleared, waived or failed. Compliance obligations such as engagement acceptance, independence, licensing and continuing education are records of the same kind.

Documents and their sensitivity are managed by folder convention

Who feels it: Audit managers, matter leads, records and governance leads

What it costs them: Nobody is certain which version is final, privileged material sits in a shared drive next to everything else, and retention amounts to never deleting anything.

How ProServiceWorld answers it: Every document is filed against its client, engagement or matter and classified from public through internal and confidential to privileged. Matters carry their own privilege flag, retention deadlines and legal hold apply to the record, and file access is scoped, expiring and logged.

One tool per profession, none of them talking

Who feels it: Multi-disciplinary firms and firms that have outgrown a single-vertical tool

What it costs them: A firm doing legal and accounting work pays for two practice systems, maintains two client lists, and reconciles two billing formats every month.

How ProServiceWorld answers it: One client, engagement and matter model covers legal, accounting, tax, advisory and consulting work, with practice areas defining each service line. A single engagement can span matters in more than one discipline without leaving the workspace.

The partner cannot see how the practice is doing

Who feels it: Managing partner, finance partner

What it costs them: Questions like which engagements are stalled, what is sitting unbilled, and which receivables have aged past ninety days get answered by intuition or a week of spreadsheet work.

How ProServiceWorld answers it: A live practice dashboard computes the firm's numbers from the same records that run the work — active clients and engagements, billed against unbilled hours, revenue by month, outstanding and collected invoices, open conflicts and pending compliance checks.

Client funds are tracked outside the practice system

Who feels it: Legal practices and any firm holding money on account

What it costs them: Trust and operating money are reconciled by hand against a bank statement, and an overdrawn client balance is discovered after the fact rather than prevented.

How ProServiceWorld answers it: Client funds sit in a dedicated trust ledger separate from operating money. Deposits, withdrawals and trust-to-operating transfers each post an immutable entry, reconciliation runs against the ledger, and a guard stops any individual client balance going negative.

Everyone can see everything, and nobody can prove who did what

Who feels it: Firm administrators, IT leads, buyers in regulated practices

What it costs them: Access is all-or-nothing, privileged work is visible to staff who should not see it, and an access question becomes an investigation instead of a lookup.

How ProServiceWorld answers it: Roles are seeded for the real jobs in a firm — managing partner, engagement lead, practitioner, compliance officer, billing coordinator, practice auditor — and are scoped per resource type. Consequential actions land in an audit trail with actor, target and result, with privileged text redacted before it is written.

05 Value Proposition

Five things a firm gets that it cannot get by buying another point tool. Each is grounded in something that ships today.

One record instead of six integrations

The client, the engagement, the matter, the document, the hour and the invoice are the same system, not six systems joined by exports. That means a number on the dashboard can be traced back to the record it came from, and a change in one place does not need reconciling anywhere else. The firm stops paying the tax of keeping copies in step.

Evidence: Clients, engagements, matters, deliverables, milestones, staffing, time, invoices, documents, trust accounts, compliance and conflict checks are all first-class records in one workspace.

Compliance that travels with the work

Conflict checks and compliance obligations are records attached to the client, the matter or the practitioner, not a separate process someone remembers to run. Engagement acceptance, independence, licensing, continuing education, data retention and legal hold are all modelled the same way, with status, evidence and resolution history. For a regulated practice this is the difference between believing it was handled and being able to show it was.

Evidence: Conflict checks capture searched parties, findings, waiver reason and who cleared them; compliance checks cover acceptance, independence, licensing, continuing education, retention and legal hold.

One platform across professions

Every serious alternative is built for a single profession — legal, or accounting, or tax — or is a generic project tool with none of the professional semantics. A firm that does more than one thing has to run more than one system. ProServiceWorld models practice areas over a shared client, engagement and matter spine, so a multi-disciplinary firm consolidates instead of integrating.

Evidence: Practice areas define the firm's service lines, and one engagement can carry matters across disciplines on the same client record.

Time to cash as one flow

Hours are captured against the engagement that holds the scope and the milestones, reviewed through submit and approve, and assembled into invoices with fixed, hourly, retainer or value-based fee arrangements. Milestone completion can raise the matching invoice. Because billing, time and delivery are one system, the firm bills what it delivered and the question of whether an invoice ever went out stops being a question.

Evidence: Time entries move draft to submitted to approved to billed; invoices move draft to sent to paid or overdue, and feed realization and receivables reporting.

Enterprise governance without an enterprise project

Single sign-on, role-based access enforced before a request reaches the service, workspace isolation, an audit trail and multi-lingual, accessible interfaces are inherited from the wider platform rather than built for this product. A twelve-person firm gets the same governance a large one does, on day one, without a rollout programme.

Evidence: Roles for partner, engagement lead, practitioner, compliance officer, billing coordinator and auditor are seeded into every workspace, and permissions are checked at the edge on every field.

An assistant that works inside privilege

The assistant is on every screen and knows which record you have open — but is given the route and an identifier, never the client name, matter title, findings or time narrative. It signs in as the person asking and inherits exactly their roles, so it cannot read a privileged matter that person cannot read. Its writes go through the same permission checks a human's do, and its history is redacted before it is stored.

Evidence: Read access covers forty-one permission-checked lookups and sixteen live practice figures; every request is metered against the firm's AI allowance, and privileged records are redacted to identifiers in the audit trail.

06 Ideal Customer Profile

A five to fifty person firm that sells expert work as engagements, is answerable to a regulator or a professional body, and has outgrown the single-vertical tool it started on.

SEGMENT	TYPICAL SIZE	WHY THEY BUY
Multi-disciplinary firms	5–100 professionals across two or more disciplines	A firm doing law and accounting, or tax and advisory, currently pays for and reconciles one practice system per discipline. This is the clearest consolidation case and the one where the shared client, engagement and matter model has no direct equivalent.

SEGMENT	TYPICAL SIZE	WHY THEY BUY
Compliance-heavy regulated practices	10–200 professionals	Audit, tax resolution, securities and forensic practices need to prove conflict clearance, independence, licensing currency and retention. They feel the absence of a compliance record every time a client or regulator asks, and no direct alternative models these natively.
Mid-size and multi-office practices	20–200 professionals, two or more offices	Tools that work for five users break at fifty. These firms need matter-level access control, segregation between delivery and approval, and an audit trail — and they are the ones who ask about single sign-on and governance in the first call.
Solo and small practices	1–10 professionals	A live free plan lets a solo practitioner run a small real practice — one seat, three active clients, ten engagements a month, two concurrent matters — and establish the system of record before growing into paid seats. Low friction, quick to demonstrate.
Advisory and specialist consultancies	10–150 consultants	Outcome-based engagements with milestones, deliverables, staffed teams and mixed fee arrangements fit the engagement model directly, and the compliance layer is a differentiator against generic professional-services automation.

GEOGRAPHIES

India first, where regional pricing and the local contracting entity make the commercial path simplest, and English-speaking international markets served through the international contracting entity. The interface is multi-lingual and locale-aware, so European and Gulf practices are workable; buyers who require an in-region data-residency commitment today should be qualified early, because residency options are agreed per deal rather than published.

NOT A FIT — DO NOT CHASE

- Product or software companies with no client engagements, no matters and no billable hours — the whole model is wrong for them
- Firms whose primary requirement is deep integration with courts, e-filing systems or a tax authority's transcript service; those integrations are not built
- Buyers who need a completed independent security certification report in hand before signing — those are targeted after launch, not available today
- Anyone looking for a marketplace to find clients or subcontractors; this is the software a firm runs itself on, not a place to buy or sell work
- Practices that want workflow driven from a shared email inbox as the primary surface, which is another product's core strength
- Organisations that require an on-premises or air-gapped installation today

07 Buyer Personas

Five people you are likely to meet in a firm, what they actually care about, and the line that opens the conversation with each of them.

Managing partner or firm principal

WHAT THEY WANT

Know how the practice is doing without chasing five systems; grow without the operating model breaking; keep the firm out of trouble with its regulator and its insurer.

WHAT FRUSTRATES THEM

Cannot answer basic questions about utilisation, unbilled work or aged receivables from one place; carries personal responsibility for compliance that lives in other people's heads.

Open with: If a client asked you today to prove you ran a conflict check before you took their work last year, how long would that take you?

They will ask: What does this replace, what does it cost when we are thirty people, and how long before the firm is actually running on it?

Engagement lead or partner in charge

WHAT THEY WANT

Deliver the engagement on scope and on margin; staff it with the right people; get it billed without a month-end argument.

WHAT FRUSTRATES THEM

Scope, hours, deliverables and the invoice live in different tools; staffing decisions are made from a spreadsheet and memory; the bill is assembled by hand from three exports.

Open with: When a milestone completes on one of your engagements, how many places do you have to touch before the invoice goes out?

They will ask: Can it handle the way we actually charge — fixed fee here, retainer there, hourly on the rest?

Compliance and risk officer

WHAT THEY WANT

Evidence that every new client and matter cleared the gate; keep licences and continuing education current; apply and release legal hold cleanly.

WHAT FRUSTRATES THEM

Conflicts checked informally, obligations tracked in a spreadsheet that is always slightly stale, and no defensible record when someone asks for one.

Open with: Where does your firm's record of conflict clearances actually live, and who can produce it under pressure?

They will ask: Can I stop work proceeding when a check is unresolved, and is the trail immutable?

Practice or billing manager

WHAT THEY WANT

Get the month-end bill run out quickly and cleanly; chase fewer queried lines; keep receivables moving.

WHAT FRUSTRATES THEM

Time exported from one system, milestone amounts copied from another, invoices built by hand in a third; thin time narratives cause disputes and delay payment.

Open with: How many of last month's invoice lines came back queried, and what did that cost you in days to payment?

They will ask: Where does the money actually get taken, and what happens to our existing accounting system?

Firm IT or operations lead

WHAT THEY WANT

One system to administer instead of six; sensible access control; a defensible answer when a client's security questionnaire arrives.

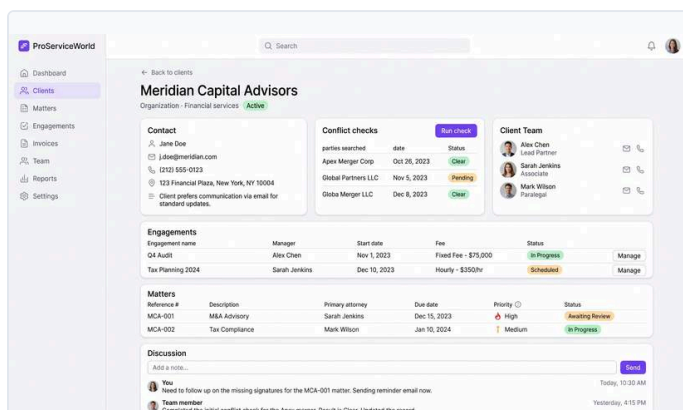
WHAT FRUSTRATES THEM

Every tool has its own logins and its own permission model; offboarding somebody means remembering six places; no consistent audit.

Open with: How many separate practice systems do you administer, and how many of them share your identity provider?

They will ask: How is access scoped, how is our data isolated from other firms, and what does the security posture look like on paper?

Fourteen situations a firm will recognise. Pick the two or three closest to the prospect in front of you rather than walking the list — each one is written so you can tell it as a short story.



ENGAGEMENT PARTNER

Take on a new client without leaving a paper trail behind

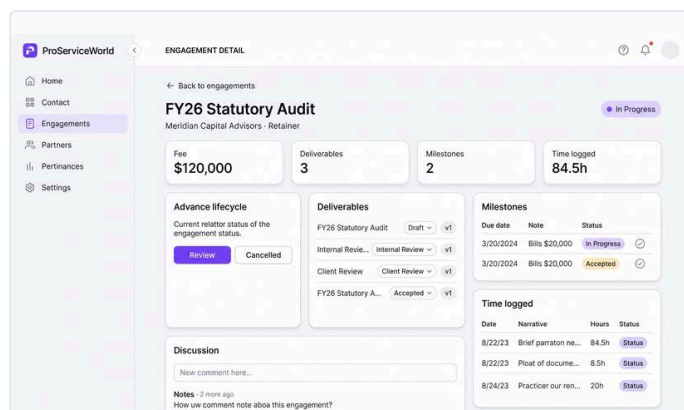
THE SITUATION

A new client arrives, and onboarding means a record in the CRM, a folder on a shared drive, and a conflict check done by asking around the office. Six months later nobody can reconstruct what was decided or checked.

WHAT HAPPENS WITH PROSERVICEWORLD

The client is created once as a continuous record with its contacts and relationship detail. A conflict check is raised against it — parties searched, findings, any waiver — and engagement acceptance captures scope, fee arrangement and the responsible partner. The engagement then opens under that same client, so everything that follows hangs off one record.

Every relationship starts the same disciplined way, and the evidence exists without anyone assembling it.



DELIVERY LEAD OR PARTNER IN CHARGE

Run an engagement the way the firm actually sold it

THE SITUATION

A generic project tracker forces the work into a shape that has nothing to do with the fee arrangement, so the commercial reality of the engagement lives in a spreadsheet next to it.

WHAT HAPPENS WITH PROSERVICEWORLD

The engagement carries its scope, its fee arrangement — fixed, hourly, retainer or value-based — its milestones, its deliverables and its staffed team with roles and rates. It advances through defined lifecycle stages, deliverables move through their own review cycle, and completing a milestone can raise the matching invoice.

Delivery and the commercial position of the engagement stay in step, without a reconciliation step.

Matter	Client	Priority	Status	Due	Actions
Regulatory Investigation — SEC Inquiry (Ref: PSW-103)	Meridian Capital	Critical	Open	Oct 28, 2023	Close
Contract Dispute (Ref: PSW-104)	Northwind Legal	High	Open	Nov 15, 2023	Close
Annual Compliance Filing (Ref: PSW-105)	Aster Health	Medium	On Hold	Dec 05, 2023	Close
Internal Audit — Q4 2023 (Ref: PSW-106)	ProServiceWorld Corp	Medium	Open	Dec 20, 2023	Close
Trademark Application (Ref: PSW-107)	BlueBird Tech	Low	Open	Jan 12, 2024	Close
GDPR Assessment (Ref: PSW-108)	Global Pharma Inc	High	Open	Nov 30, 2023	Close
Patent Litigation (Ref: PSW-109)	QuantumLeap Dynamics	Critical	On Hold	Jan 31, 2024	Close
M&A Due Diligence (Ref: PSW-110)	Innovate Solutions	High	Closed	Oct 01, 2023	Reopen

MATTER LEAD IN A LEGAL, AUDIT OR TAX PRACTICE

Give regulated work the discipline it requires

THE SITUATION

The professional thread of the work — the deadlines, the privileged material, the independence scope — is being tracked in a diary and a folder, because the practice system treats everything as a project.

WHAT HAPPENS WITH PROSERVICEWORLD

A matter opens under the client, inside or alongside the engagement, with its own status, priority, responsible practitioners and deadlines. It carries a privilege flag, and access is scoped so only the right people see it. One client can carry many matters across disciplines, each with its own obligations.

The professional obligations of the work are a property of the record rather than a habit.

Client	Parties searched	Run	Status	Actions
Beta Corp	Beta Corp, Gamma LLP, John Roe	Apr 13, 2022	Cleared	
Gamma LLP	Beta Corp, Gamma LLP, John Roe	Apr 13, 2023	Pending	Resolve
Gamma Conflict	Beta Corp, Gamma LLP, John Roe	Apr 13, 2023	Potential Conflict	
Gamma LLP	Beta Corp, Gamma LLP, John Roe	Apr 13, 2023	Conflict	
Gamma Conflict SaaS	Beta Corp, Gamma LLP, John Roe	Apr 13, 2023	Waived	
John Ipsum LLP	Beta Corp, Gamma LLP, John Roe	Apr 13, 2023	Waived	

COMPLIANCE AND RISK OFFICER

Make the conflict check a gate rather than a conversation

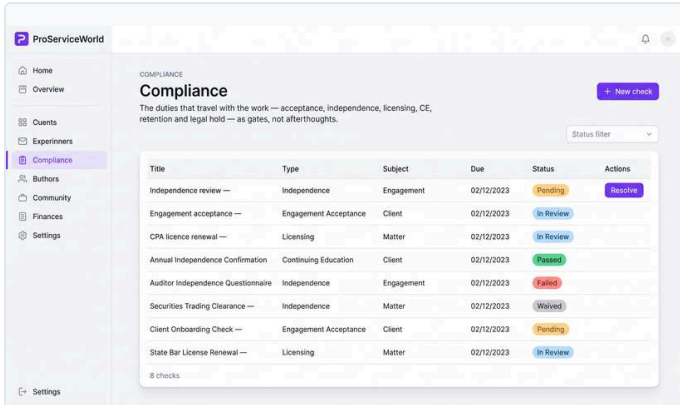
THE SITUATION

Before accepting a client or opening a matter, someone asks the room whether anyone sees a problem. It usually works, and it is completely unevidenced.

WHAT HAPPENS WITH PROSERVICEWORLD

A conflict check is raised against the client and optionally against a specific matter, recording the parties searched, the findings and any waiver reason. It moves through pending, cleared, waived or failed, with the person who resolved it and when, and it sits on the client's own page beside the work it protects.

The firm can show, on every engagement, that it checked, decided and approved before work began.



PRACTICE RISK LEAD

Keep licences, independence and continuing education current

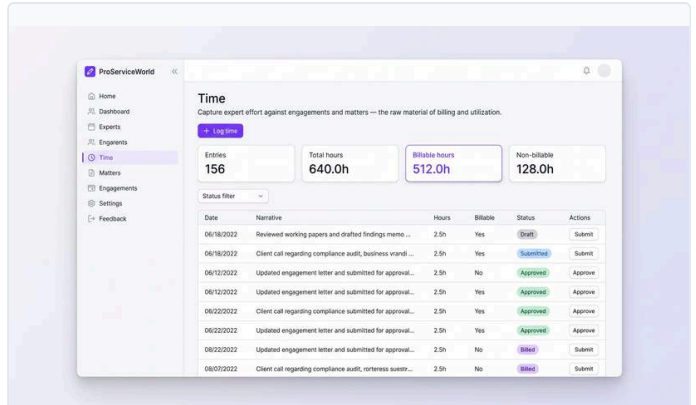
THE SITUATION

Practitioner licences, bar or accountancy registrations and continuing-education requirements are tracked in a spreadsheet that is always slightly out of date, and a lapse is discovered by someone external.

WHAT HAPPENS WITH PROSERVICEWORLD

Licensing, continuing education, independence, engagement acceptance, data retention and legal hold are all compliance checks of typed kinds, attached to the person, the client, the engagement or the matter. Each carries status, evidence and a resolution history, and pending checks surface alongside the work they relate to.

Obligations become records the firm can report on rather than facts living in someone's head.



SENIOR ASSOCIATE OR FEE EARNER

Stop losing hours between doing the work and billing it

THE SITUATION

Time is reconstructed at the end of the week from calendar entries and memory. Hours get rounded down or dropped, and the write-off is invisible because nobody ever recorded them.

WHAT HAPPENS WITH PROSERVICEWORLD

Time is entered against the specific engagement or matter with minutes, a rate, a billable flag and a narrative. Entries move through submit and approve so only reviewed time reaches a bill, and billed against unbilled hours are computed from the same records that feed realization and utilisation.

What reaches the invoice is reviewed, attributable and defensible when a client queries it.

ProServiceWorld

Dashboard

Overview

Invoices

Experience

Pricing

Collections

Payments

Notes

Settings

INVOICES

Invoices

64

Outstanding

\$84,500

Collected

\$312,000

Status filter

Number	Client	Total	Status	Due	Actions
INV-2026-014	Meridian Capital	\$42,000	Draft	2026-05-15	Mark paid
INV-2026-013	Northwind Legal	\$18,500	Paid	2026-04-20	Mark paid
INV-2026-011	Aster Health	\$9,800	Overdue	2026-05-01	Mark paid
INV-2026-010	Summit Tech	\$25,000	Sent	2026-05-18	Mark paid
INV-2026-009	Stellar Dynamics	\$55,000	Draft	2026-06-01	Mark paid
INV-2026-008	Nova Solutions	\$12,300	Cancelled	N/A	Mark paid
INV-2026-007	Orion Consultants	\$8,900	Paid	2026-04-30	Mark paid
INV-2026-006	Echo Media	\$19,400	Sent	2026-05-20	Mark paid

BILLING MANAGER

Assemble the month-end bill run from the work itself

THE SITUATION

Month end means exporting time from one system, copying milestone amounts from another, and building invoices by hand in a third — slow, error-prone, and the source of most disputes.

WHAT HAPPENS WITH PROSERVICEWORLD

Invoices assemble from approved time entries, milestone triggers and the engagement's fee arrangement, then move through draft, sent, paid and overdue. Outstanding and collected totals, and the collection rate, are computed live from those same invoices.

Time to cash tightens, and whether an invoice went out stops being a question anyone has to ask.

ProServiceWorld

Home

Documents

Company

Status

Evidence

Documents

Settings

Documents

Engagement letters, opinions, filings and evidence — metadata, classification and legal hold here; the file itself lives in the shared Files service.

Classification filter

Name	Classification	Status	Added	Actions
Engagement Letter — Confidential — Final v2	Public	Draft	Apr 16, 2023	Download
Audit Report Draft — Privileged — Draft v1	Internal	Final	Apr 16, 2023	Download
Board Resolution — Internal — Final v1	Confidential	Final	Apr 16, 2023	Download
Board Resolution — Internal — Final v2	Confidential	Final	Apr 28, 2023	Download
Board Resolution — Internal — Draft v2	Privileged	Archived	Apr 28, 2023	Download
Board Resolution — Internal — Final v1	Privileged	Archived	Apr 28, 2023	Download
Board Resolution — Internal — Final v1	Privileged	Final	Apr 28, 2023	Download

24 documents

AUDIT MANAGER OR RECORDS LEAD

Govern working papers instead of storing them

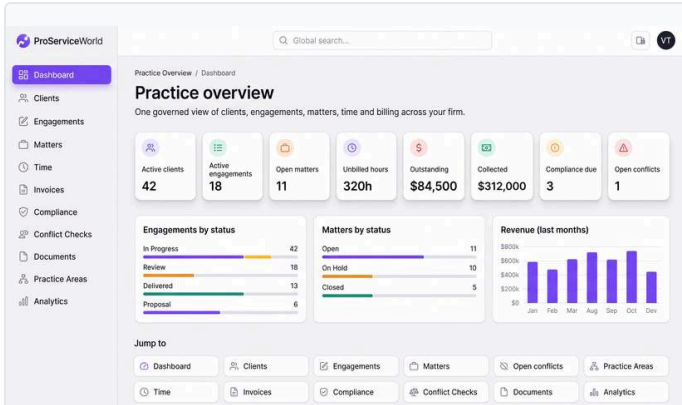
THE SITUATION

Working papers live across email attachments, a shared drive and three laptops. When a reviewer asks whether a document is the final version, nobody is sure.

WHAT HAPPENS WITH PROSERVICEWORLD

Every document is filed against the client, engagement or matter it belongs to, with versioning, tags and a classification from public through internal and confidential to privileged. Retention deadlines and legal hold apply to the record, and file access is scoped, expiring and logged.

The document store stops being a liability and becomes part of the evidence.



MANAGING PARTNER

Answer 'how is the firm doing' from one screen

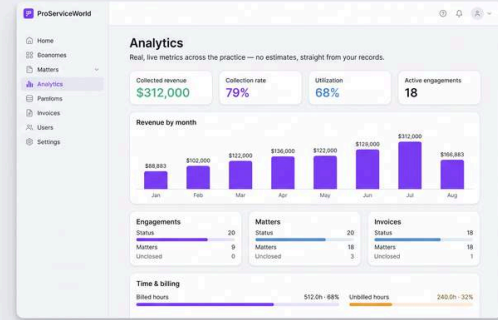
THE SITUATION

Answering that question means opening the project tool, the timer, the billing system and two spreadsheets — and still ending up estimating.

WHAT HAPPENS WITH PROSERVICEWORLD

A practice dashboard computes the firm's state directly from its records: active clients and engagements, open matters, billed against unbilled hours, revenue by month, outstanding and collected invoice totals, engagement and invoice distributions by status, open conflicts, pending compliance checks and client funds held.

The partner runs the firm from a live view rather than a reconciliation exercise.



FINANCE PARTNER

See where the margin is actually going

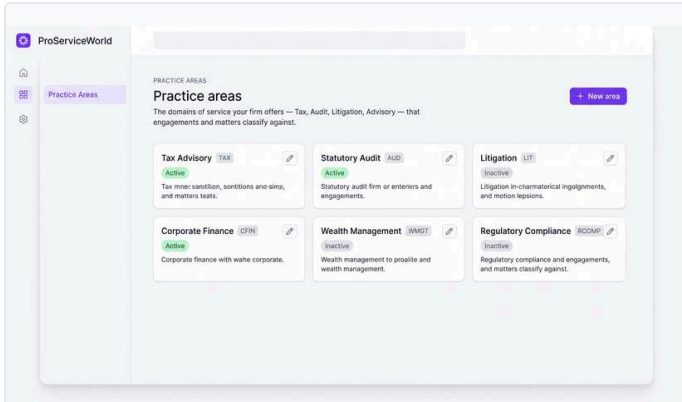
THE SITUATION

The firm knows its top-line revenue but cannot say whether it is realising the rates it set, who is under-used, or which receivable has aged past ninety days.

WHAT HAPPENS WITH PROSERVICEWORLD

Analytics roll up collection rate, utilisation, billed against unbilled hours and revenue trend from the same time entries and invoices that run the practice, so the numbers can be re-derived line by line rather than reconstructed.

Rate and staffing decisions get made on the firm's own data instead of partner intuition.



PRACTICE DIRECTOR OR SERVICE OWNER

Define the firm's service lines once

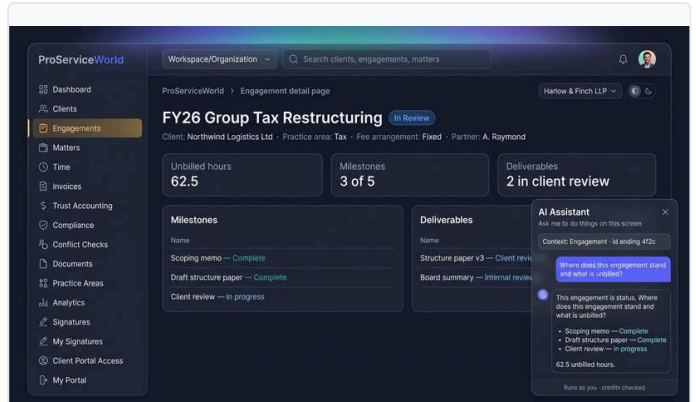
THE SITUATION

The firm sells the same handful of offerings repeatedly, but every proposal re-describes them from scratch and no two quite match.

WHAT HAPPENS WITH PROSERVICEWORLD

Practice areas define each service line with its scope, specialisations and the deliverables it produces. New engagements open against a practice area, so the shape of the work and the language used to sell it come from the firm's own agreed definition.

Delivery is consistent regardless of which partner sold it.



PRACTICE MANAGER

Ask the firm's records a question instead of navigating to it

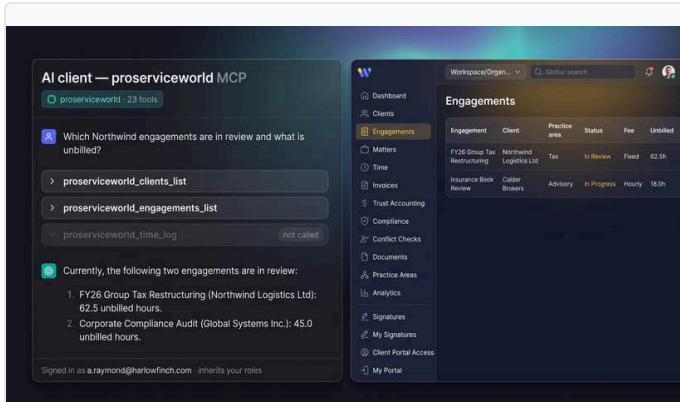
THE SITUATION

A partner wants to know which matters are still unbilled and a client is on hold asking whether their deliverable went out. Neither is hard work — it is knowing which screen holds the answer and which filter to set.

WHAT HAPPENS WITH PROSERVICEWORLD

The assistant sits on every screen and is told which record you have open, so 'this engagement' resolves without pasting an identifier. It runs permission-checked lookups across clients, engagements, matters, time, invoices, documents and checks, and quotes live practice figures rather than estimating them. It is never given the record's contents — no client name, matter title, findings or narrative.

Navigation stops being the work, and privileged text never leaves the page it belongs to.



FIRM IT LEAD OR A PARTNER WHO LIVES IN AN AI CLIENT

Work the firm from the AI client you already use

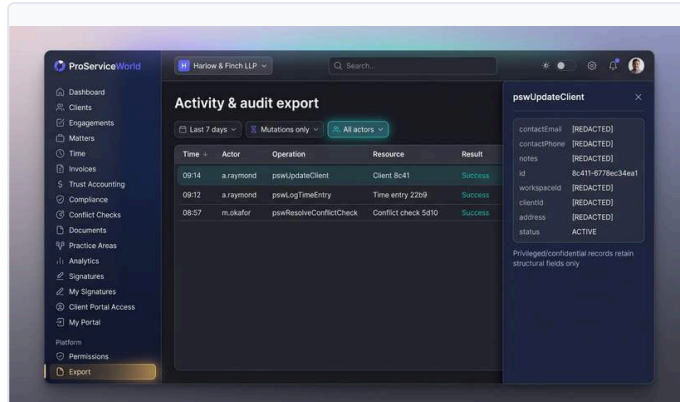
THE SITUATION

Someone whose working surface is an AI client all day does not want to switch into another web application to ask which engagements are in review and how many hours sit unbilled against them.

WHAT HAPPENS WITH PROSERVICEWORLD

A set of firm tools — clients, engagements, matters, invoices, time, compliance and conflict checks, practice areas — is exposed to an external AI client, authenticated as a real person and limited to that person's permissions, alongside read-only references so the agent grounds itself in the firm's own vocabulary rather than guessing.

The firm's records are reachable from the tools people already work in, without a shared machine account.



FIRM ADMINISTRATOR

Prove what an assistant reached and what it touched

THE SITUATION

The real question about AI in a privileged practice is not whether it is clever. It is what it could have reached, what it actually did, and whether the firm can demonstrate either to a client, a regulator or an insurer.

WHAT HAPPENS WITH PROSERVICEWORLD

Every operation carries a permission directive enforced before the service is reached, so an agent carrying a person's identity inherits exactly that person's roles and there is no elevated path for automation. Every change is recorded with a preview that is redacted first — credentials, contact details, notes, titles, findings and narratives — and on a privileged record, everything but the identifiers.

AI access becomes something the firm can reason about and evidence, rather than trust.

09 Product Capabilities

What exists today, what is being built, and what is still on the roadmap. Anything not marked shipped should be described as such in front of a prospect — regulated buyers check, and the credibility is worth more than the claim.

Clients and engagements

The commercial spine: the client relationship, the work sold against it, and the people delivering it.

Continuous client record

Clients as individuals or organisations, from prospect through active to archived, carrying contacts, relationship detail, and every engagement, matter, document, invoice and check that follows.

Engagement lifecycle

Engagements advance through proposal, accepted, in progress, review, delivered, invoiced and closed, with allowed transitions rather than free-text status.

Fee arrangements

Fixed, hourly, retainer and value-based arrangements on the engagement, each driving the right billing behaviour.

Milestones and deliverables

Milestones as checkpoints that can trigger the matching invoice; deliverables with their own review cycle and acceptance step.

Team and staffing

Assign practitioners to an engagement or matter with a role, an allocation percentage and a billing rate, designate a lead, and pull one person's load across everything they are on.

Practice areas

Service lines with scope, specialisations and deliverable definitions, so engagements open against the firm's own agreed offering.

Engagement and deliverable templates planned

Packaged scope, default milestones, document checklists and quality gates so a new engagement starts from the firm's best practice.

Matters, documents and privilege

The professional half of the work, and the records it produces.

Matters and cases

The regulated thread inside or alongside an engagement, with its own status, priority, responsible practitioners and deadlines, and a privilege flag.

Document classification

Every document filed against its client, engagement or matter and classified public, internal, confidential or privileged.

Retention and legal hold

Retention deadlines and legal hold applied to and released from the records in scope, with the action evidenced.

Versioning and scoped sharing

Folders, versions, tags and status on documents, with file access scoped, expiring and logged through the shared file service.

Secure client document rooms in progress

Governed spaces to request documents from a client, deliver outputs back, or run a diligence-style exchange with an audit trail on every action.

In-context discussion in progress

Threaded conversation, attachments and mentions anchored to the engagement, matter or document they concern.

Time, billing and client funds

The path from expert effort to collected cash, including money held on a client's behalf.

Time capture with approval

Manual entry against an engagement or matter with minutes, rate, billable flag and narrative, moving through draft, submitted, approved or rejected, then billed.

Invoice assembly

Invoices built from approved time, milestone triggers and the fee arrangement, moving through draft, sent, paid or overdue.

Trust accounting

A dedicated client-funds ledger separate from operating money, with deposits, withdrawals, trust-to-operating transfers, reconciliation and a per-client negative-balance guard.

Receivables and realization reporting

Outstanding and collected totals, collection rate, billed against unbilled hours and utilisation computed from the firm's own records.

Recurring and retainer billing in progress

Retainer and managed-service arrangements billed on a recurring schedule through the platform billing service.

Taking payment inside the product planned

Client card and bank payment against an issued invoice from within the application; today invoices are issued and marked paid rather than collected in-app.

Compliance, conflicts and governance

The conditions of practice, modelled as records the firm can produce on demand.

Conflict-of-interest checks

A record on the client and optionally a matter, capturing parties searched, findings, waiver reason and who cleared it, moving through pending, cleared, waived or failed.

Compliance obligations

Typed checks for engagement acceptance, independence, licensing, continuing education, data retention and legal hold, each with status, evidence and resolution history.

Role-based access control

Seeded roles for managing partner, engagement lead, practitioner, compliance officer, billing coordinator and practice auditor, scoped per resource type and checked before the request reaches the service.

Audit trail

Consequential actions recorded with actor, target and result, with contact details, narratives, findings and privileged content redacted before the entry is written.

Automatic conflict triage planned

Cross-matching new parties against the firm's existing clients, counterparties and matters and proposing a draft finding for a human to clear; today the check records a person's judgement rather than proposing one.

Independent security certification planned

Third-party audited certification and annual penetration testing, targeted after launch; data-residency commitments are agreed per deal.

Insight and reporting

The numbers a partner needs, computed from the records rather than reassembled.

Practice dashboard

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

Analytics views

Collection rate, utilisation and status distributions across engagements, invoices and matters.

Data export in progress

Export firm data as CSV or JSON for use in other tools; coverage is still expanding and this is not yet a full reporting surface.

Resource and capacity planning planned

Forward-looking bench and capacity planning across the practice; staffing today is per engagement with allocation percentages and a per-person load view.

AI assistant and agent access

AI as a governed teammate under the firm's own permissions — with the judgment half honestly marked as roadmap.

Assistant on every screen

Reachable from dashboard, clients, engagements, matters, time, invoices, trust accounting, compliance, conflicts, documents, practice areas, analytics, signatures and the client portal.

Record context without content

It is told which page and which record you have open so 'this matter' resolves, and is never given the client name, matter title, findings or your time narrative.

Permission-checked lookups

Forty-one filtered reads across the firm domain plus sixteen live practice figures, all running under the asking person's own roles.

Firm tools in your own AI client in progress

Twenty-three firm tools plus read-only references exposed to an external AI client, authenticated as a real person; the published package for general installation is not out yet.

Governed writes with confirm and undo in progress

Changes already run through the same permission checks a person's do and are metered and audited; an explicit confirmation step and an undo are not built yet.

Judgment work planned

Conflict triage, stalled-engagement detection, pre-bill readiness and drafted time narratives are designed and deliberately not live; nothing reads or writes a time narrative today.

Client experience and surfaces

How the firm's clients and its own people reach the system.

Web application

The full product in any modern browser — the primary surface, multi-lingual, keyboard-navigable and available in light, dark and high-contrast themes.

Client portal

A practitioner grants an existing user portal access to one client record; the client then sees only their own matters, invoices and shared documents. Self-service email-invite signup is not built.

Native e-signatures

Request, view and sign documents by typing or drawing a signature, with sent, viewed and signed recorded in an append-only trail alongside the document's content hash. Third-party signing providers are not integrated.

Single sign-on and API access

Enterprise single sign-on for people, device-code login for command-line and editor tools, and API keys for automation.

Command line, libraries and extensions in progress

A command-line tool, Node and Python libraries and browser and editor extensions are early scaffolds rather than published, generally available surfaces.

Mobile and desktop applications planned

Phone and tablet builds for approvals, time capture and status checks, and a signed desktop build for Windows, macOS and Linux.

10 Pricing & Plans

One recurring subscription per firm, priced by seats and practice volume. There is no commission, no take rate and no per-transaction fee — the platform never sits between the firm and its own clients' money. Every plan includes the full domain model, audit, role-based access and multi-tenancy; what scales by plan is seats, storage, AI allowance, API quota, compliance depth, governance options and support. A free plan is live today; the paid tiers exist as plans but their prices are set at general availability and are not published yet, so quote them as a conversation rather than a number.

PLAN	PRICE	WHO IT IS FOR	WHAT IS INCLUDED
Free	\$0 Live today, no charge, no card required	A solo practitioner starting out, or any firm that wants to run real work through the product before committing	1 team seat; 3 active clients (a slot frees when a client is archived); 10 engagements per month; 2 concurrent matters (a slot frees when a matter is closed); Provided as is, with community support and no service-level commitment
Solo	Contact us Monthly or annual; price published at general availability	Independent professionals and solo practices running a full book of client work	Single practitioner seat; Full domain model — clients, engagements, matters, documents, time, billing, compliance; Higher client, engagement and matter allowances than the free plan; Exact quotas set when the tier is published
Practice	Contact us Monthly or annual; price published at general availability	Small firms of roughly two to twenty-five people sharing client records across partners	Pooled team seats; Shared client records, team staffing and conflict checking across the firm; Client portal access for the firm's own clients; Larger storage and API allowances
Firm	Contact us Monthly or annual; price published at general availability	Mid-size and multi-office practices that need governance and deeper compliance	Matter-level access control and segregation between delivery and approval; Deeper compliance and longer audit retention; Higher seat, storage and AI allowances; Dedicated tenancy available as an option
Enterprise	Contact us Negotiated annually; scope and price set per deal	Large and regulated firms with stricter governance, residency or support requirements	Configurable governance controls and segregation of duties; Dedicated tenancy and data-residency options; Negotiated service-level commitment — no self-serve plan carries one; Named support and an agreed onboarding plan

Add-ons

ADD-ON	PRICE
Additional practitioner seats	Contact us
Additional document and deliverable storage	Contact us
Additional AI allowance	Contact us
Dedicated tenancy and data-residency options	Contact us
Extended compliance and audit retention package	Contact us
Premium support	Contact us
Onboarding and migration services	Custom, under a statement of work

WHAT TO TELL A PROSPECT ABOUT PRICE

- Never quote a paid-tier figure. The free plan is \$0 and the paid tiers are priced at general availability — for anything above free, introduce the prospect and let us quote.
- Fees are exclusive of taxes. Indian buyers are invoiced by the Indian contracting entity and international buyers by the international one; the checkout identifies which applies, and Indian business buyers need a valid tax registration number.
- Regional pricing bands apply, so the same plan is priced for the buyer's market rather than converted from a single list price.
- Standard plans are billed monthly or annually — there is no annual-upfront requirement, which is a genuine difference against one of the named alternatives.
- Material price changes carry thirty days' notice; the free plan carries no service-level commitment and may be rate-limited.

11 Competitive Landscape

Six alternatives you will meet. Each is genuinely good at something, and each is narrower than this product in a way that only matters to some firms. Lead with the concession — a comparison where the other side never wins is one a partner will stop believing.

ALTERNATIVE	WHAT IT IS	WHERE THEY ARE STRONG	WHERE WE WIN
Clio	The best-known cloud practice-management system for law firms, with a large legal ecosystem covering court calendars, electronic filing, trust accounting and legal billing formats.	For a pure law firm, Clio is the safe choice: a very large installed base, deep trust-account reconciliation, hundreds of legal integrations, and court and e-filing connections we simply do not have. A firm whose top requirement is e-filing should buy Clio.	One client, engagement and matter model runs legal alongside accounting, tax and advisory work — Clio is legal only. Compliance beyond trust accounting is first class here: conflict checks, engagement acceptance, independence, licensing, continuing education, retention and legal hold are records, not add-ons. Higher Clio tiers require a sales quote.
Karbon	A premium accounting practice-management product built around workflow automation and a shared email inbox, with well-regarded AI features for prioritising and summarising client correspondence.	Email-driven workflow is their core strength and we have nothing like it. Their AI practice intelligence is live where our judgment features are still roadmap, and their interface has a strong reputation with accounting teams.	Billing depth: invoices from time, milestones and fixed, hourly, retainer or value-based arrangements, where Karbon's billing leans on an external payment integration. No compliance or conflict engine on their side at all, and no legal, tax or consulting depth — Karbon is accounting only.
TaxDome	An all-in-one platform for tax practices covering client relationship management, portal, documents, electronic signature, workflow and billing, with tax-authority transcript integration on higher tiers.	Their client portal is more mature than ours and includes unlimited storage and signing, and their tax-authority transcript integration has no equivalent here. For a tax-only practice, the fit is tight.	Tax runs alongside accounting, legal and advisory on one record rather than in a tax-only tool. Conflict checks, engagement acceptance, retention and legal-hold tracking exist here and do not there. And TaxDome bills annually upfront per seat, while standard plans here can be monthly.
PracticePanther	A modern, approachable legal practice-management product covering matters, time, billing and trust accounting, popular with small and solo law firms.	Simple, quick to adopt, with trust accounting on its higher tier and native phone and tablet applications that we do not have yet. For a two-person law firm that wants something that just works, it is a reasonable choice.	No compliance engine and no conflict checking on their side; no deliverables with review cycles and acceptance gates; and legal only. Firms that grow into multiple disciplines or a governance requirement outgrow it.

ALTERNATIVE	WHAT IT IS	WHERE THEY ARE STRONG	WHERE WE WIN
BigTime	A mid-market professional-services automation product for consulting, accounting and engineering firms, strong on time, expense, project budgeting and resource planning.	Resource and capacity planning is their core strength and ours is roadmap. Their time and expense tracking is mature, and their entry tier is inexpensive. For a consultancy whose main problem is bench utilisation, they are the better fit today.	Their work model is a generic project container, with no matter, no privilege, no conflict check and no compliance obligations. Document management is limited. Firms doing regulated work need semantics BigTime does not have.
Xero Practice Manager	Accounting practice management tightly integrated with the Xero accounting platform, using a job-based model, often bundled with a Xero subscription.	If a firm already runs its clients' books in Xero, the native integration and the bundled pricing are hard to beat, and their client portal and phone applications are established.	No dependency on one accounting ecosystem, and legal, tax, advisory and consulting work run in the same workspace. A job does not express a matter, a privilege flag or a conflict scope. No compliance or conflict engine on their side.

THE POSITIONING LINE TO HOLD

Every serious alternative is built for one profession; ProServiceWorld runs legal, accounting, tax and advisory work on one client, engagement and matter model, with conflicts and compliance wired into the lifecycle rather than bolted on.

12 Why Us / Differentiators

If a partner remembers only a few things, make it these. Each is something a prospect can check.

One model across professions, not one product per profession

Clients, practice areas, engagements and matters share a single model, so a firm doing legal and accounting work, or tax and advisory, consolidates onto one system instead of integrating two. Every named alternative is built for a single vertical or is a generic project tool with none of the professional semantics.

The engagement owns the matter and the money

Competitors organise around cases, jobs, tax-season workflows or projects. Here the engagement is the commercial container — scope, fee arrangement, milestones, deliverables, team — and the matter is the regulated thread inside it. Completing a milestone can raise the invoice, so delivery and billing never drift apart.

Compliance is a record, not a process

Conflict checks and typed compliance obligations covering acceptance, independence, licensing, continuing education, retention and legal hold are first-class entities with status, evidence and a resolution history. No direct alternative offers this natively; most offer nothing at all beyond trust accounting.

Privilege carried by the record

Matters carry a privilege flag and documents are classified from public through to privileged, with access enforced accordingly. Retention deadlines and legal hold apply to the record itself. Generic tools express none of this, and even legal-specific tools rarely carry it beyond the matter.

Client money kept honest by the system

Trust accounting with a separate client-funds ledger, immutable entries for every deposit, withdrawal and transfer to operating, reconciliation, and a guard preventing any client balance going negative. This is table stakes for a law firm and absent from most cross-vertical products.

Enterprise governance inherited, not deferred

Single sign-on, role-based access checked before a request reaches the service, workspace isolation, an audit trail, multi-lingual and accessible interfaces come from the wider platform. A small firm gets the same governance a large one does without a rollout programme.

An assistant that is you, with your permissions

The assistant signs in as the person asking and inherits exactly their roles — no shared machine account and no elevated path for automation. It is told which record you have open and nothing about what is inside it, and its history is redacted before it is stored, so an audit trail never becomes the one place privileged text lives forever.

Honest about the roadmap

The public site marks the judgment half of the AI work, resource planning, conflict triage and tax-authority integrations as roadmap rather than shipped, and says so on the page a prospect reads. In a market where every vendor claims AI, being checkable is a differentiator.

13 Customer Proof & Credibility

There are no customer references to lean on. Build credibility instead from what a prospect can verify for themselves: the depth of the domain model, the governance posture, the roles and permissions the product ships with, and the fact that the public material marks unfinished work as unfinished. Invite scrutiny rather than deflecting it.

DEPTH OF THE DOMAIN MODEL

Clients, engagements with fee arrangements and lifecycle transitions, matters with privilege, deliverables and milestones, staffing with allocation and rates, time through submit and approve, invoices, classified documents with retention and legal hold, trust accounts, conflict checks and typed compliance obligations — all first-class records, all inspectable in a live account.

GOVERNANCE POSTURE

Role-based access checked before a request reaches the service, workspace isolation per firm, encryption in transit and at rest, credentials held in a per-environment secret store, and an audit trail of consequential actions with actor, target and result.

ROLES THAT MATCH A REAL FIRM

Six roles are seeded into every workspace — managing partner, engagement lead, practitioner, compliance officer, billing coordinator and practice auditor — with deliberate separations, such as an engagement lead who can see compliance findings but cannot clear or waive them.

PRIVILEGE HANDLING THAT IS DESIGNED, NOT INCIDENTAL

The assistant receives a route and an identifier, never record content. Audit previews are redacted of contact details, notes, titles, findings and narratives, and on a privileged record everything but the structural identifiers is stripped.

A LIVE FREE PLAN

A prospect can create a workspace today and run a real, small practice through it — one seat, three active clients, ten engagements a month, two concurrent matters — before any commercial conversation. That is stronger evidence than any deck.

PUBLISHED, CHECKABLE STATUS

The product's own website marks each capability shipped, in progress or roadmap, and names where competitors currently lead. Point a sceptical prospect at it; the willingness to publish that is itself the argument.

A STATED CERTIFICATION PATH

Independent security certification and annual third-party penetration testing are targeted after launch rather than claimed now, and data handling follows the privacy commitments published on the site. Buyers who need a completed report today should be told plainly that it does not exist yet.

Be straight about this. ProServiceWorld is generally available but early. There are no public reference customers, no published usage numbers, no independent security certification yet, and no third-party review record — anyone who tells a prospect otherwise is making it up. Several things incumbents do well are still roadmap here: court and tax-authority integrations, resource and capacity planning, phone and desktop applications, automatic conflict triage, and the judgment half of the AI features. What a prospect should weigh instead is whether the domain model matches how their firm actually works, whether the governance and privilege handling stand up to their own scrutiny, and how the product behaves when they run real work through the free plan for a fortnight. That is a fair basis for a decision, and it is the one we ask for.

14 Demo Information

The demo that lands is a firm's own story told in order: take on a client, clear the conflict, open the engagement, do the work, bill it, and then show the trail. Resist the temptation to tour every screen — pick the buyer in the room and follow their thread.

HOW TO GET A DEMO

Anyone can create a workspace on the free plan and follow along in their own account, which is the strongest version of this demo. For a guided walkthrough focused on a specific practice area, book time with us directly and we will run it.

Runs about Twenty minutes for the core story; thirty-five if the room includes a compliance officer or a security-minded IT lead who wants to see permissions and the audit trail.

WHERE TO LOOK

- **Product website** — <https://proserviceworld.com>
- **Sign in or create a workspace** — <https://app.proserviceworld.com/login>
- **Use-case stories, by role** — <https://proserviceworld.com/use-cases>
- **Head-to-head comparisons** — <https://proserviceworld.com/vs>
- **Security and governance** — <https://proserviceworld.com/security>
- **Book a walkthrough with us** — <https://calendly.com/vignesh-burdenoff/1-1>

The walkthrough, in order

- 1 The practice dashboard**

Start here. Active clients and engagements, billed against unbilled hours, outstanding and collected invoices, open conflicts and pending compliance — all computed from the firm's own records. This is the screen the managing partner opens on a Monday.
- 2 A client record with its history**

The client is the spine. Contacts, relationship detail, and every engagement, matter, document, invoice and check that has ever attached to it. Notice there is no separate customer system to reconcile against.
- 3 A conflict check on that client**

Before work is accepted, the check records the parties searched, what was found, any waiver, and who cleared it. It sits on the client's own page next to the work it protects. This is what a firm produces when someone asks how it decided to take the work.
- 4 An engagement with milestones, deliverables and team**

The engagement carries the scope, the fee arrangement, the milestones, the deliverables and the staffed team with roles and rates. It advances through defined stages rather than a free-text status field, and completing a milestone can raise the matching invoice.
- 5 A matter under the same client**

The engagement is the commercial container; the matter is the professional one — its own deadlines, its responsible practitioners, and a privilege flag that changes who can see it. This is the piece a generic project tool cannot express.
- 6 Time entry and the approval step**

Hours are logged against this specific engagement or matter with a rate, a narrative and a billable flag, then reviewed before they can be billed. Only approved time reaches the invoice, which is what makes it defensible when a client queries a line.
- 7 The invoice and the trust ledger**

The invoice assembles from approved time, milestone triggers and the fee arrangement. If the firm holds client money, the trust ledger keeps it separate from operating funds, with every movement posted immutably and a guard against a negative client balance.
- 8 The assistant, and then the audit trail behind it**

Ask it something about the engagement you have open. It knows which record you mean, runs the same lookups your role allows, and never receives the client's name or the matter title. Then show the trail: what it did, redacted of anything privileged.

15 Sales Talking Points

Eight sentences that do work in a conversation. They are written to be said, not read out.

Most firms do not have a software problem, they have a seams problem.

It reframes the conversation away from a feature comparison and towards where the firm's money and risk actually leak. Almost every partner recognises it immediately.

Every alternative on the shortlist is built for one profession.

It is verifiable in thirty seconds and it is the single fact that decides the deal for a multi-disciplinary firm. It also sets up the concession that for a single-profession firm, the incumbent may well be the right answer.

Compliance here is a record you can produce, not a process you remember to run.

For a regulated practice, evidence is the product. Conflict checks and obligations with status, findings and a resolution history are exactly what an insurer or a professional body asks for.

The engagement owns the matter and the money.

It is the shortest way to explain why this is not a project tracker. Scope, fee arrangement, milestones, deliverables and the invoice sit on one object rather than being joined by exports.

The assistant signs in as you and inherits exactly your permissions.

Every AI conversation in a privileged practice is really a question about blast radius. This answers it in one sentence, and the redacted audit trail answers the follow-up.

Nothing is billed that has not been reviewed.

Time moving through submit and approve before it can reach an invoice is what turns a billing conversation from a feature list into a margin argument.

You can run a real, small practice on the free plan today, before you talk to anyone.

It removes the friction of a procurement conversation and produces the strongest evidence available. It also demonstrates the product's own confidence.

We publish what we have not built.

The website marks judgment-level AI, resource planning and tax-authority integrations as roadmap. Saying this before a prospect discovers it converts an objection into a reason to trust the rest.

The ten you will actually hear, in the words prospects use. Answer the hard ones straight — a partner who oversells and is caught costs more than the deal was worth.

"I cannot find a price on your website. What does this actually cost?"

The free plan is genuinely free — one seat, three active clients, ten engagements a month, two concurrent matters, no card. The paid tiers exist but their prices are being set for general availability, so I am not going to invent a number for you. Tell me the size of your firm and what you are replacing, and we will come back with a quote you can compare against what you pay today.

PROOF · The free plan and its quotas are live and can be checked in five minutes by creating a workspace.

"You are new. Why would I move my whole practice onto something with no track record?"

You should not, on my say-so. What you should do is run one live matter through it for a fortnight on the free plan, with real hours and a real conflict check, and see whether the model matches how your firm works. If it does not, you have lost two weeks.

Firms that switch practice systems on a demo are the ones that regret it.

PROOF · The free plan supports real work end to end, and the product's own site marks each capability shipped, in progress or roadmap so claims can be checked.

"Why would I not just buy the market leader for my profession?"

If you are a pure law firm whose top requirement is electronic court filing, you probably should. Where that answer breaks down is when a firm does more than one thing, or when compliance beyond trust accounting matters. Then you are buying two systems and reconciling them, and paying for the seam. What does your firm do that does not fit inside one profession?

PROOF · Every named alternative is single-vertical or a generic project tool; the comparison pages on the site name where each of them still wins.

"We already have a practice system. Switching is more disruption than it is worth."

Then do not switch anything yet. Start with the part that is not in your practice system today — usually conflicts, acceptance and compliance obligations, which are living in a spreadsheet. Get that in one place, and see whether the rest wants to follow.

Nobody should migrate a live matter book in one weekend.

PROOF · Conflict checks and typed compliance obligations are first-class records, and data can be exported as CSV or JSON.

"Why not just build this on the tools we already have?"

Firms try, and what they build is usually a client list and a timer. The parts that take real work are the ones you notice a year later: privilege carried at the matter level, a trust ledger that cannot go negative, an audit trail redacted before it is written, and role separation between the person who delivers and the person who clears a conflict. That is a multi-year build, and it is not what your firm is paid for.

PROOF · Six seeded roles with deliberate separations, per-resource permission levels, trust accounting with a negative-balance guard, and redaction rules on the audit trail.

"What happens to our data if this does not work out, or if you disappear?"

Fair question for an early product. Firm data exports as CSV or JSON today, and export coverage is expanding. There is no commission model and no dependency on us sitting between you and your clients' money, so if you leave, you leave with your records and your client relationships intact. I would rather you ask this now than in year three.

PROOF · Data export in CSV and JSON is available; the product is subscription-only with no take rate on the firm's own client billing.

"Our work is privileged. How do I know an AI feature will not leak it?"

The assistant is given the page you are on and an identifier for the record — never the client name, the matter title, the findings or your time narrative. It signs in as you and inherits your roles, so it cannot open a matter you cannot open. And the history it writes is redacted before it is stored, so an audit trail does not become the one place your privileged text lives forever.

PROOF · Record content is excluded from assistant context by design; audit previews strip contact details, notes, titles, findings and narratives, and privileged records are reduced to identifiers.

"Send me your security certification report and we will start there."

There isn't one yet. Independent certification and annual third-party penetration testing are targeted after launch, and I am not going to pretend otherwise. What exists today is role-based access checked before a request reaches the service, workspace isolation, encryption in transit and at rest, secrets held per environment, and an audit trail. If a completed report is a hard gate for you, this is not the right time and I would rather say so.

PROOF · The security page on the site lists what is in place today and marks certification, residency options and penetration testing as planned.

"You are a small company. What support do we actually get?"

On the free plan, community support and no service commitment — that is stated plainly rather than buried. Paid plans carry support, and a service-level commitment is negotiated at the enterprise tier rather than implied on a self-serve plan. What you also get, being early, is direct access to the people building it, which larger vendors cannot offer at your size.

PROOF · Support levels are set by plan; the free plan is explicitly provided as is, and service-level commitments are enterprise-only and negotiated.

"Does it do everything my current tool does?"

No, and I will tell you which parts. Court and tax-authority integrations, resource and capacity planning, phone and desktop applications, automatic conflict triage and AI-drafted time narratives are not built. If any one of those is your top requirement, buy the tool that has it. If your top requirement is one record across professions with compliance built in, that is where this wins.

PROOF · The comparison pages name where each competitor still leads, and the capability list marks unfinished work as in progress or planned.

"We hold client money. Can it handle that properly?"

Yes, and this is one of the areas that is genuinely built. Client funds sit in a dedicated trust ledger separate from operating money, every deposit, withdrawal and transfer posts an immutable entry, reconciliation runs against the ledger, and a per-client guard prevents a balance going negative. What is not there is integration with a specific jurisdiction's reporting format, so ask us about yours.

PROOF · Trust accounting with ledger entries, reconciliation and a per-client negative-balance guard is shipped.

"My people will never adopt another system."

That is usually a symptom of adding a seventh tool rather than replacing several. The adoption test here is whether a fee earner can log time, find a document and see their matters in one place instead of three. Run it with two people for a fortnight and let them tell you. If it is not obviously less work for them, it will not stick and you should not buy it.

PROOF · Time, documents, matters and invoices sit on one record; the free plan makes a two-person trial possible without a purchase.

17 Discovery / Qualification Questions

Ask these early. The answers tell you within ten minutes whether this is a real opportunity, and they give us something useful when you hand it over.

ASK THIS

LISTEN FOR

Walk me through what happens in your firm between winning a piece of work and sending the invoice for it. Which systems does it touch?

The number of systems named. Three or more, especially if one is a spreadsheet, is the core opportunity. If the answer is one system and they are happy, this is a hard sell.

Does your firm do more than one kind of professional work — say legal and accounting, or tax and advisory?

A yes is the strongest single qualifier. Follow up with whether each discipline runs on its own practice tool, and whether client records are duplicated between them.

Before you take on new work, how does the firm check for a conflict, and where is that check recorded?

Any answer involving asking around, memory, or a spreadsheet. Silence or discomfort here is a strong buying signal, particularly if a compliance officer is in the room.

If a client asked today for the record of everything done on their matter and every hour billed, how long would that take you to produce?

Days rather than minutes, or an answer that involves several people. This exposes the fragmentation cost without anyone having to be sold to.

How much of the work your fee earners do never reaches an invoice, and how would you know?

An estimate rather than a number, or an admission that timesheets are reconstructed weekly. Both point straight at the time-capture and approval flow.

Who in the firm can see privileged or confidential client material today, and how is that controlled?

Folder permissions, honour system, or 'everyone technically can'. This is where matter-level access and document classification land hardest.

Does the firm hold money on behalf of clients, and how is that reconciled today?

Manual reconciliation against a bank statement, or a separate ledger nobody enjoys maintaining. If they hold client money, trust accounting moves from nice-to-have to a requirement.

ASK THIS

How many people are fee earners, and how many offices or entities does the firm operate across?

LISTEN FOR

Size and structure. Five to fifty across one or two offices is the sweet spot; over a hundred, or multi-entity, needs us involved early for governance and residency questions.

What are you paying today, across all the practice tools, per person per month?

A stack total. A firm paying for two or three single-vertical tools has a consolidation case that does not depend on our price being known yet.

What has to be true for you to change practice systems this year — and what would stop it?

Budget cycle, a renewal date, a partner who owns the decision, or a hard requirement such as court filing or a completed security certification. Surface the blocker before we build a quote.

Who signs this off, and has your firm been asked for a security questionnaire by a client recently?

The decision-maker and whether governance is already on their agenda. If a client has recently sent a questionnaire, the governance story matters more than the feature list.

18 How to Identify a Good Opportunity

Spend your time on the green ones. A partner who walks away from a poor fit early is worth more to us than one who brings us everything.

STRONG SIGNAL — PURSUE

- The firm does two or more kinds of professional work and runs a separate practice tool for each
- Conflict checks or engagement acceptance happen informally, and nobody can produce a record of them
- The firm holds client money and reconciles the trust position by hand
- A partner cannot answer how the practice is performing without opening several systems
- Between five and about a hundred fee earners, growing, and openly outgrowing the tool they started on
- A client or insurer has recently asked the firm a governance or security question it struggled to answer

Introduce us straight away.

WORTH A CONVERSATION

- Single-profession firm that is otherwise a good fit — the multi-vertical argument does not land, so lead with compliance and privilege instead
 - Deep in a competitor's ecosystem, with a renewal more than six months away
 - Under ten people with no compliance pressure — real, but a free-plan self-serve motion rather than a quoted deal
 - Interested primarily in the AI features; qualify hard, because the judgment half is roadmap and disappointment here is expensive
 - Buyer wants a specific jurisdiction's data residency, which is agreed per deal rather than published
 - Enthusiastic operations manager with no partner sponsor identified
- Qualify further before an introduction.

POOR FIT — DO NOT CHASE

- Not a professional-services firm at all — no clients, no engagements, no billable work
- Electronic court filing or a tax authority's transcript service is the number one requirement
- A completed independent security certification report is a hard procurement gate today
- Looking for a marketplace to find clients or subcontract work rather than software to run a firm on
- Requires an on-premises or air-gapped installation
- Wants a fixed all-in price quoted this week with no conversation

Politely park it; suggest another product if one fits.

THE ONE-QUESTION TEST

Ask: 'How does your firm record that it checked for a conflict before taking on new work?' If the answer is a conflict-checking system they already trust, walk on. If it is a spreadsheet, an email thread, or an uncomfortable pause, you have a real opportunity — because that answer almost always sits next to a stack of disconnected tools.

19 How to Introduce Us

Keep the introduction short and specific to what the firm told you. You are not selling the product — you are earning us twenty minutes. Name the problem you heard in their own words, say what this is in one line, and offer the call.

IN CONVERSATION

"Say something close to: 'You mentioned your client list, your matters and your billing all live in different places, and that the conflict check is basically a conversation. There's a product built exactly for that — ProServiceWorld. It runs the whole firm on one record: clients, engagements, matters, documents, hours, invoices, and the compliance checks that gate the work. It's early, and they're straight about what isn't built yet. There's a free plan you can try this week, or I can introduce you to Vignesh, who runs it, for twenty minutes. Which would you rather?'"

EMAIL — SUBJECT: ONE SYSTEM FOR YOUR CLIENTS, MATTERS AND BILLING

Hi [Name],

After our conversation about [the conflict check being a hallway conversation / hours never reaching the invoice / running two practice systems], I thought this was worth five minutes of your time.

ProServiceWorld is a practice-management platform for professional-services firms. Clients, engagements, matters, documents, time, invoices, trust accounting and the compliance and conflict checks that gate the work all live on one record — across legal, accounting, tax and advisory, rather than one tool per profession.

It is early and they are open about what is not built yet. There is a free plan you can run real work through: <https://proserviceworld.com>

If it looks relevant, I can introduce you to Vignesh T.V., who runs it — vignesh@burdenoff.com, +91-7358445777, or book directly at <https://calendly.com/vignesh-burdenoff/1-1>

Best,
[Your name]

SHORT MESSAGE / LINKEDIN

Short version for a message: 'You mentioned running separate systems for [discipline] and [discipline]. ProServiceWorld puts clients, engagements, matters, time, billing and compliance on one record across both — proserviceworld.com. Early product, free plan, and they publish what they haven't built. Happy to introduce you to the founder if it's useful.'

WARM THREE-WAY INTRODUCTION

For a three-way email: 'Vignesh — [Name] runs a [size]-person [legal / accounting / advisory] practice in [place]. They're running [n] systems and their conflict checks aren't recorded anywhere. Sounded like exactly the problem you're solving. [Name] — Vignesh T.V. built ProServiceWorld and is the right person to show you how a firm like yours would actually use it. I'll leave you two to it.' Copy vignesh@burdenoff.com and include the calendar link so nobody has to chase a time.

Please do not: Do not quote a price for any paid tier. The free plan is \$0; everything above it is a conversation, and an invented number is very hard to walk back.; Do not claim customers, logos, usage numbers or independent certification. None exist, and a regulated buyer will check.; Do not promise court filing, tax-authority integration, resource planning, phone applications, or AI that drafts time narratives — those are roadmap.; Do not describe it as a marketplace for finding clients or subcontractors. It is the software a firm runs its own business on.; Do not run a technical deep dive on our behalf. Get the meeting, hand over what you learned, and let us take the detail.

20 Lead Handoff Process

The handover is the part that decides whether the introduction turns into anything. Give us the firm's own words, not a summary — five specific sentences beat a filled-in form every time.

1 Register the opportunity before you introduce

Email vignesh@burdenoff.com with the firm's name, the contact, and one line on the problem you heard. Registration is what protects your claim to the deal, and it has to happen before the conversation starts rather than after it closes.

2 Send the context alongside the introduction

Firm size, disciplines practised, what they run today, and the specific pain that started the conversation. Quote them where you can — 'the conflict check is basically me asking the room' tells us more than 'compliance concerns'.

3 Make the introduction

A three-way email or a short call. Copy vignesh@burdenoff.com and include <https://calendly.com/vignesh-burdenoff/1-1> so the prospect can book directly rather than waiting on a reply.

4 Stay on the thread

You do not have to run the sales process, but stay copied in. Partners who remain visible get better outcomes and are far easier to credit when the deal closes.

5 Agree who does what before the second meeting

If you want to stay involved through evaluation or delivery, say so early — it changes which partner programme applies and what you earn. Deciding this after a quote has gone out is the most common way a partner ends up on a lower tier than they expected.

6 Tell us when something changes

A renewal date, a competing shortlist, a new decision-maker, or the firm going quiet. Early warning is worth more than a polished update.

SEND US THIS — IT IS ALL WE NEED

- Firm name, city and rough size in fee earners
- Which professional disciplines the firm practises, and whether it operates across more than one office or legal entity
- The systems they run today, and roughly what they pay per person per month across all of them
- The specific pain that started the conversation, in the prospect's own words
- Who signs off, and whether there is a renewal date or budget cycle in play
- Any hard requirement you already know about — court filing, a tax authority integration, data residency, or a completed security certification
- Your name and the partner programme you are operating under, so the opportunity is attributed correctly from the start

WHAT HAPPENS NEXT, AND WHEN

We acknowledge a registered introduction within one working day and aim to have a first conversation with the prospect inside five working days. If a firm needs something faster — a renewal deadline, for instance — say so in the registration email and call +91-7358445777.

Deal registration: Register before the prospect is engaged. An approved registration protects the opportunity for ninety days, with one further ninety-day extension where there is active progress. There is no retrospective registration: if there was already an active conversation with that firm, the introduction does not qualify unless it opens a genuinely new buying centre or materially expands the scope. Duplicate claims go to the first approved partner who made a real contribution, and any split needs written agreement.

21 Partner / Referral Commercials

ProServiceWorld is sold on subscription only — there is no commission on the firm's own client billing and no transaction take rate — so partner earnings are a percentage of collected net subscription revenue. These are the standard Burdenoff partner programme terms, which are consistent across the product portfolio. Pick the tier that matches what you will actually do: introduce, support the evaluation, or deliver the implementation.

PROGRAMME	YOUR ROLE	FIRST-YEAR	RENEWAL / ADD-ONS
Referral Partner	Registered introduction, no sales ownership	10% of first-year collected net subscription	0% unless separately approved · 3%, capped at \$10,000
Consulting Partner	Introduction plus evaluation support	12% of first-year collected net subscription	0–3% if active in the success plan · 3%, capped at \$15,000
Implementation Partner	Introduction plus implementation delivery	15% of first-year collected net subscription	3–5% if active in the renewal success plan · 5%, capped at \$25,000
Authorised Reseller	Approved resale under the ProServiceWorld name, first-line commercial ownership	Up to 15% reseller margin on the approved quote	Up to 8% if the account stays active and supported · Up to 5% on dedicated tenant or managed services, if approved
Managed Service or Strategic Partner	Bundled or managed offering built around the product	Custom	Custom · Custom

THE RULES THAT MATTER

- Register the opportunity before the prospect is engaged. Approved registrations are protected for ninety days, extendable once where there is active progress; there is no retrospective registration.
- Earnings are calculated on collected net subscription revenue — after taxes, refunds, chargebacks, credits, discounts and payment-processing fees — never on list price or on the firm's own client billing.
- Regional pricing is the normal price for that market, not a discount, and does not affect eligibility. Extra discounts and credits do reduce the commissionable amount.
- Final pricing, discounting and eligibility are set by us, and every reseller quote needs approval before it is sent.
- One commercial programme applies per customer. Partner and affiliate rewards do not stack on the same account without a written exception.
- Renewal earnings require an approved, active role in the account at renewal — an introduction alone does not carry forward.
- Refunds, cancellations and chargebacks are clawed back or deducted from future payouts.

GETTING PAID

Paid fifteen days after the revenue is realised, once settlement, refund, cancellation, fraud, tax and payout-document checks have cleared. Multi-year commitments are paid as the cash is collected rather than on total contract value unless separately approved. Partners handle their own tax filings; we withhold and report where the law requires it, and currency is per the partner agreement.

These are the standard partner programme terms and are for guidance only. They are not an offer and not a contract. The terms that actually apply are those in your signed partner agreement and in the quote issued to the customer; where the two differ, the signed documents govern. Rates, caps and eligibility can change, and every quote requires our approval before it goes to a customer.

22 Contact Information

YOUR CONTACT

Vignesh T.V.
vignesh@burdenoff.com
+91-7358445777

BOOK A 1-1 CALL

<https://calendly.com/vignesh-burdenoff/1-1>

Use this for anything — qualification, pricing, a joint call with your prospect, or a live demo.

EVERY BURDENOFF PRODUCT

<https://burdenoff.com/products>

If ProServiceWorld is not the right fit, the answer may well be on that page.

WHICH CHANNEL FOR WHAT

- **A live opportunity** — email with the handoff details in section 20, and copy the phone number in if it is time-sensitive.
- **A question you cannot answer** — book the 1-1 call; it is usually faster than email.
- **A prospect who wants to meet us** — send them the calendly link directly, or ask for a joint call.

23 Useful Links & Sales Assets

ASSET	WHERE	WHAT IT IS FOR
ProServiceWorld website	https://proserviceworld.com	The public product site — positioning, capabilities, and the honest status of each one. Safe to share with anyone.
Sign in or create a workspace	https://app.proserviceworld.com/login	The application itself. A prospect can start on the free plan here without talking to anyone.
Documentation	https://docs.proserviceworld.com	Guides and reference material for people evaluating or setting up the product.
Use-case stories by role	https://proserviceworld.com/use-cases	Twenty-six scenarios written per role. The quickest way to send a prospect something that sounds like their own week.
Head-to-head comparisons	https://proserviceworld.com/vs	Per-competitor pages naming where each alternative still wins. Useful when a prospect is already on a shortlist.
Security and governance	https://proserviceworld.com/security	What is in place today and what is planned. Send this before a security questionnaire arrives rather than after.
AI approach	https://proserviceworld.com/ai	How the assistant handles privilege, permissions and audit — and which AI capabilities are still roadmap.
Book a call with Vignesh T.V.	https://calendly.com/vignesh-burdenoff/1-1	Twenty minutes, direct. Include this in every introduction so nobody has to chase a time.
Contact Vignesh T.V. directly	mailto:vignesh@burdenoff.com	Founder and the person who runs this product. Also reachable on +91-7358445777 for anything urgent.
General product enquiries	mailto:contact@proserviceworld.com	For prospects who would rather write to the product team than to a person.
All Burdenoff products	https://burdenoff.com/products	The wider portfolio. Worth a look if your contact's problem turns out to sit somewhere else.

WHAT YOU CAN SHARE, AND WITH WHOM

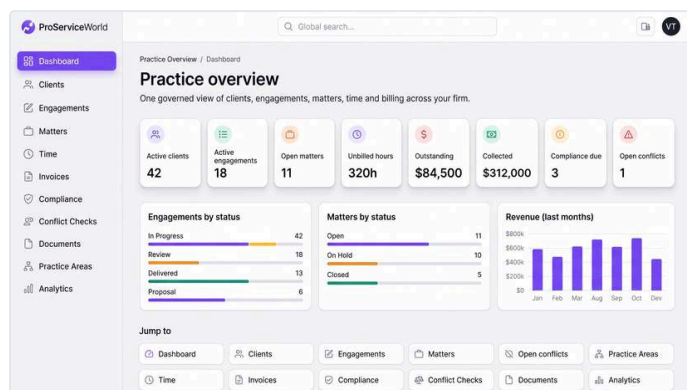
- Share freely: the product website, the use-case stories, the comparison pages, the security page, the AI page and the documentation. These are public, already reviewed, and written to be read by a prospect.
- Prospect-only: this playbook and the cheat sheet. They are written for you, contain competitive positioning and internal guidance on qualification, and should not be forwarded to a customer or published.
- Needs our sign-off before it goes out: any price for a paid tier, any written commitment on timing, roadmap, service levels, data residency or dedicated tenancy, and any reseller quote.
- Never create: customer names, logos, usage figures, testimonials, comparison claims not on the public comparison pages, or any statement that a security certification exists. If you need a claim that is not already published, ask us and we will either supply it or tell you it is not true.
- Use the product's own vocabulary when you write about it — engagement, matter, practice area, conflict check, compliance check, deliverable, trust ledger — and gloss each one the first time it appears for a reader outside the profession.

24 Product Mockups — Complete Visual Appendix

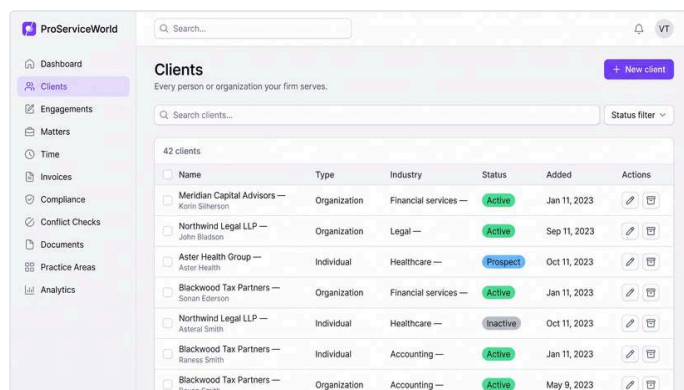
29 SCREENS

Every screen in the ProServiceWorld design set — 29 in total, none omitted. Use these to show a prospect what the product looks like before a live demo.

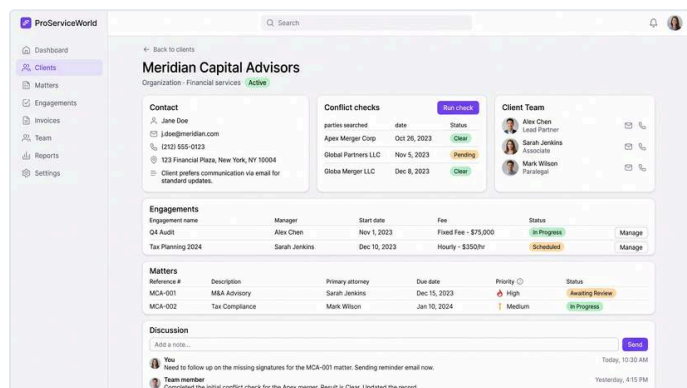
PRODUCT SCREENS • 25 SCREENS



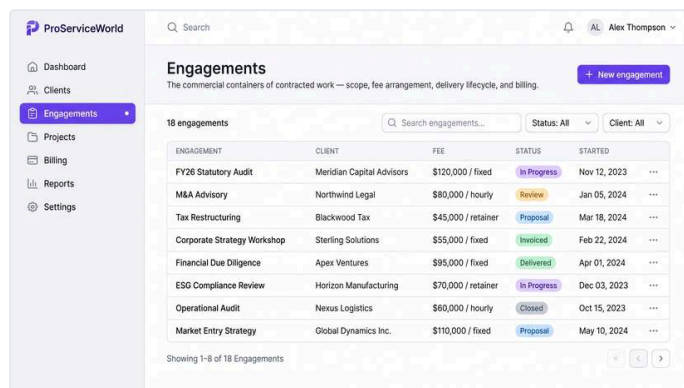
001 Psw 01 Dashboard



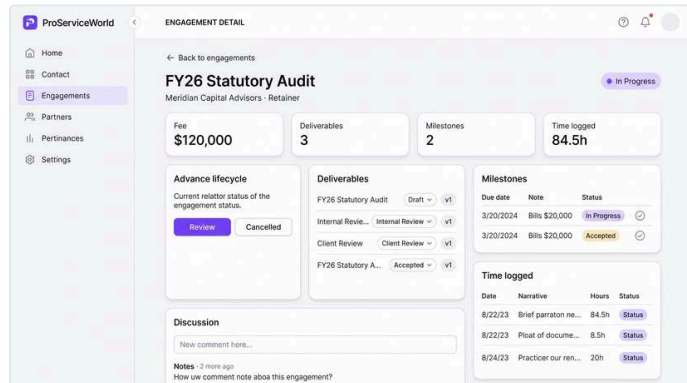
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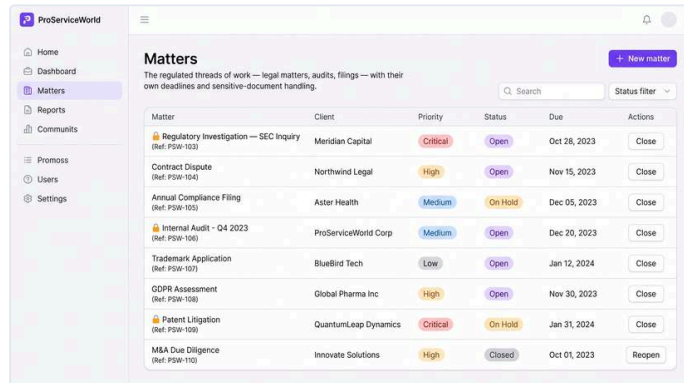
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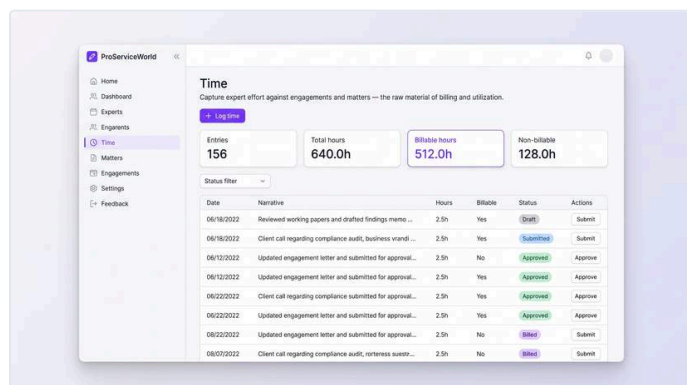
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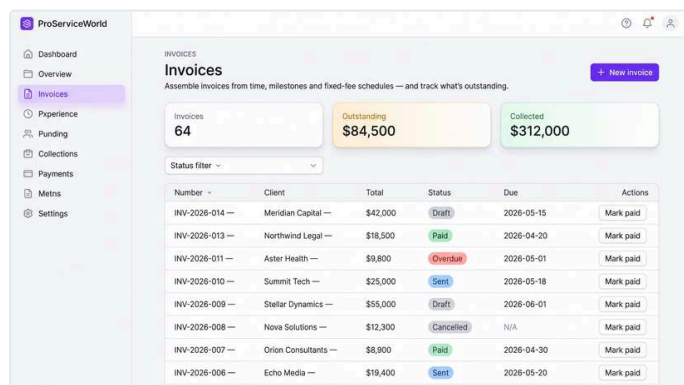
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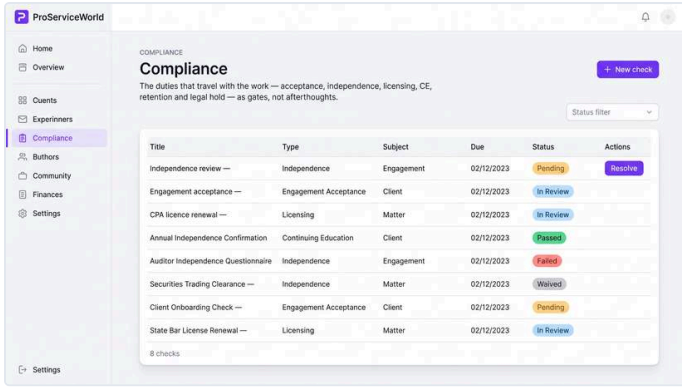
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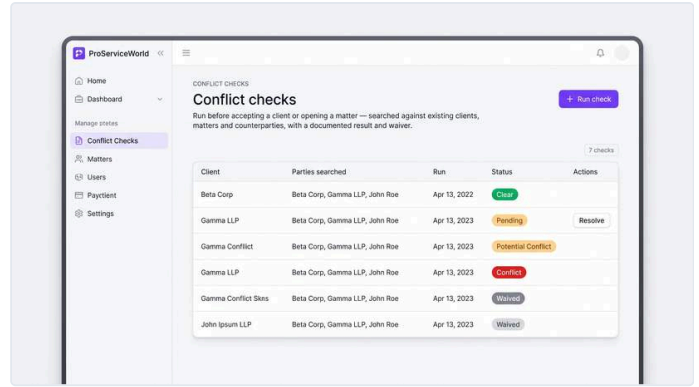
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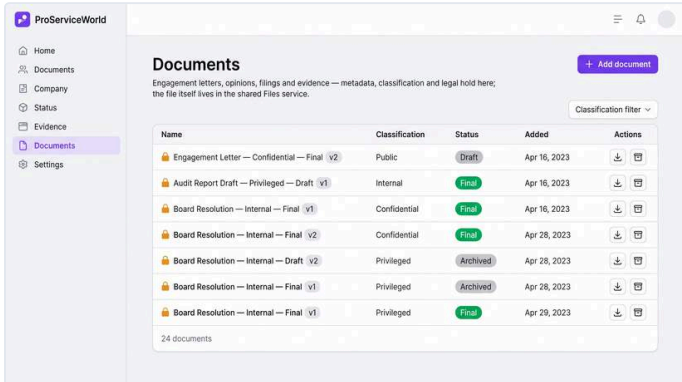
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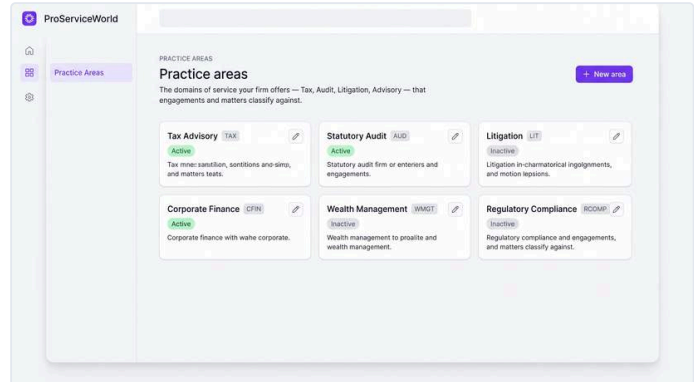
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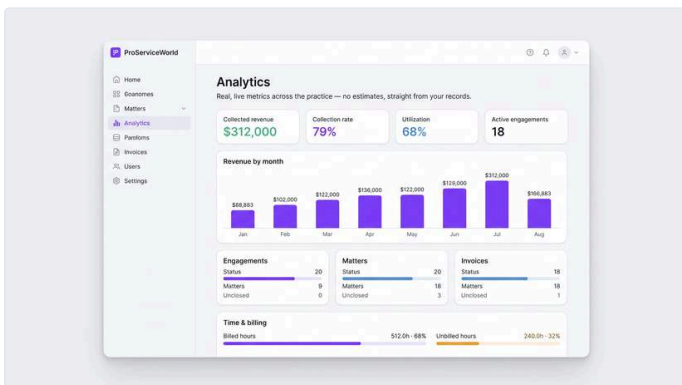
010 Psw 10 Conflicts



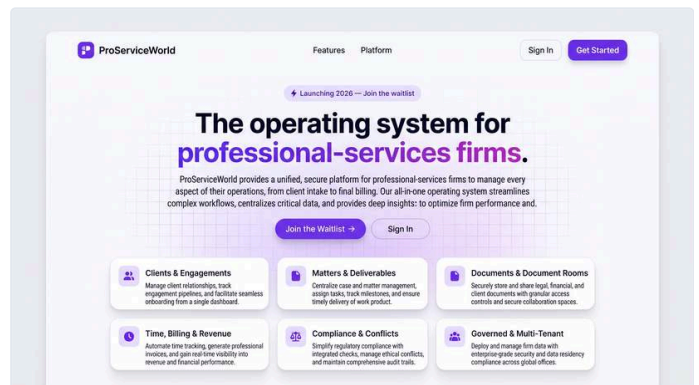
011 Psw 11 Documents



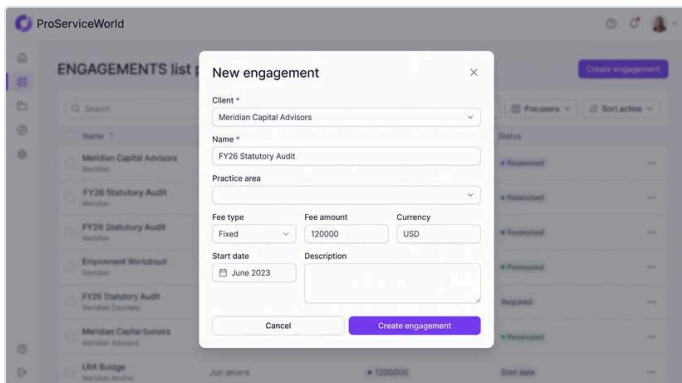
012 Psw 12 Practice Areas



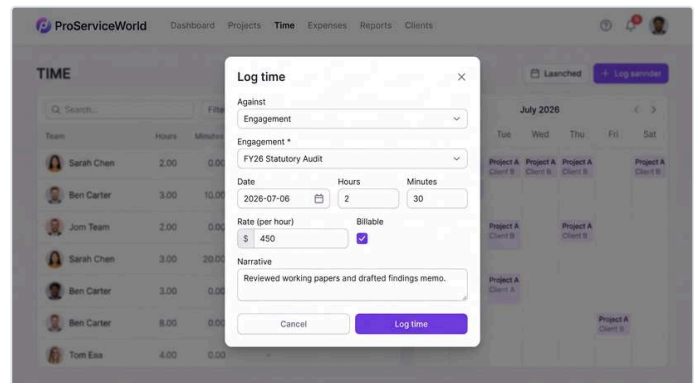
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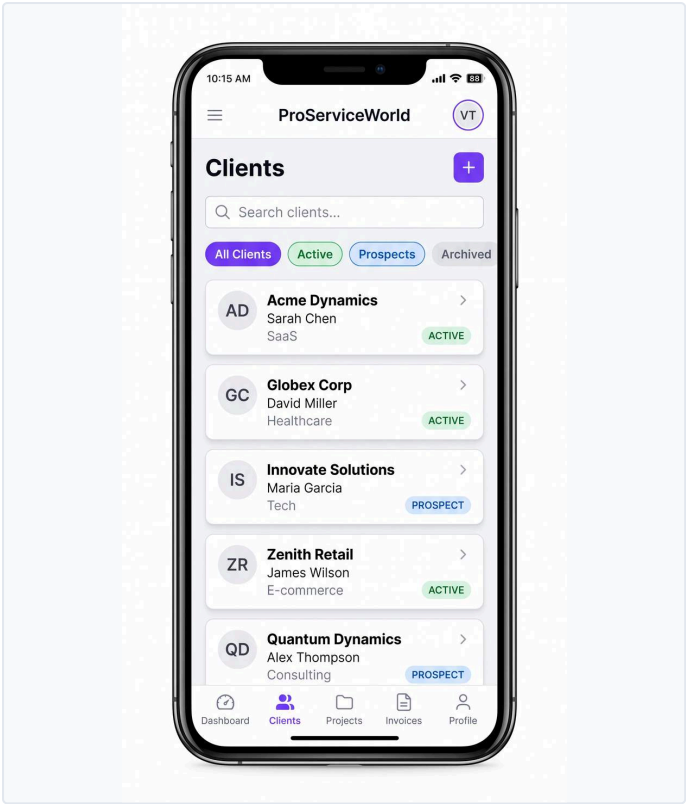
014 Psw 14 Landing



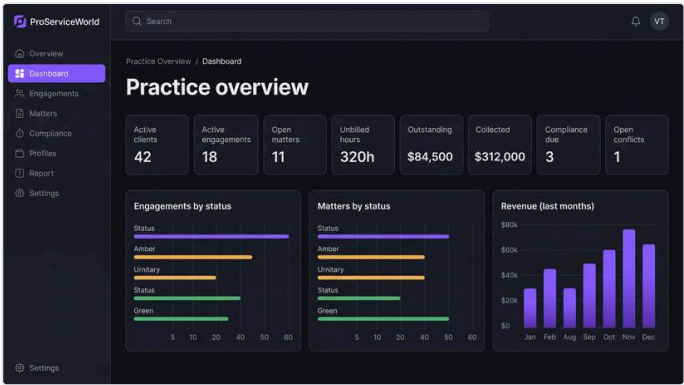
015 Psw 15 New Engagement Modal



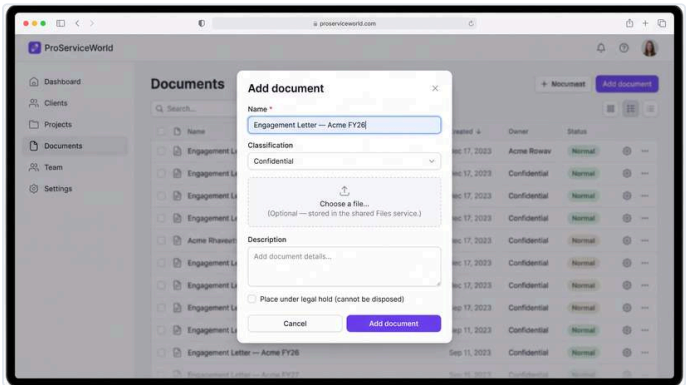
016 Psw 16 Log Time Modal



017 Psw 17 Mobile Clients



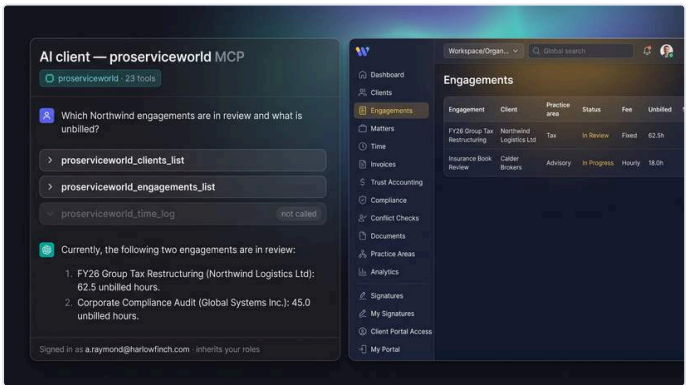
018 Psw 18 Dark Dashboard



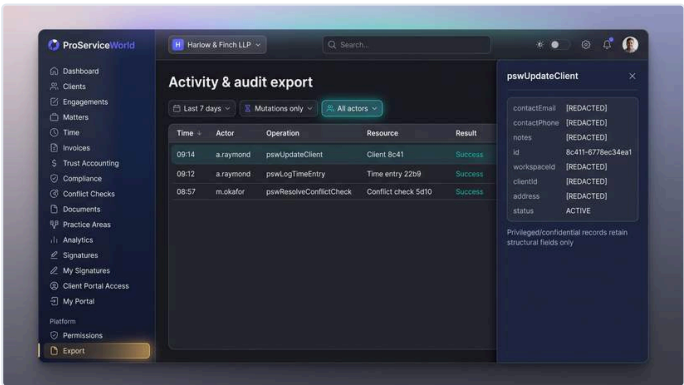
019 Psw 19 Add Document Modal



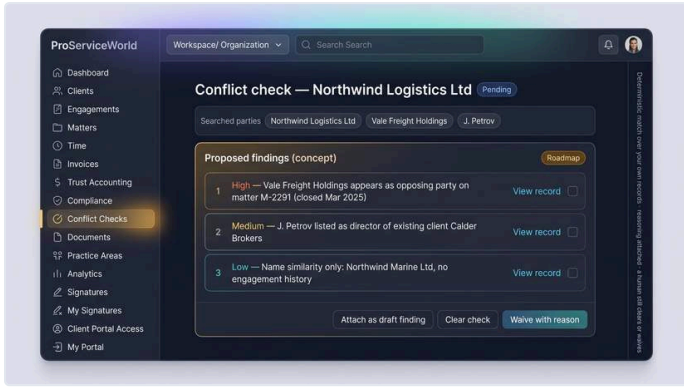
020 Psw 20 AI Assistant Engagement



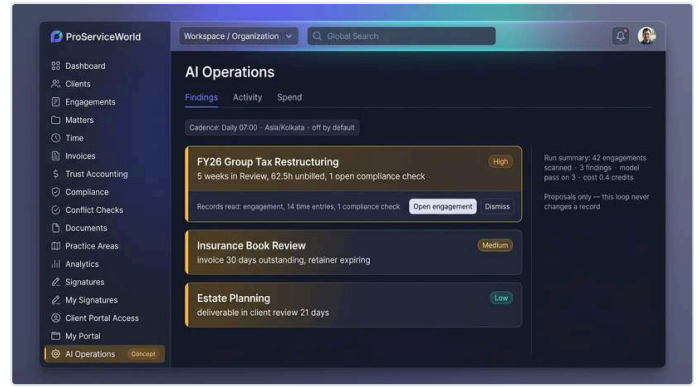
021 Psw 21 AI MCP Agent Session



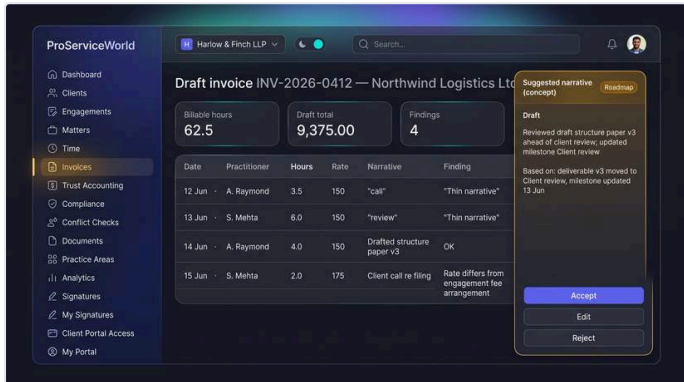
022 Psw 22 AI Agent Audit Trail



023 Psw 23 AI Conflict Triage

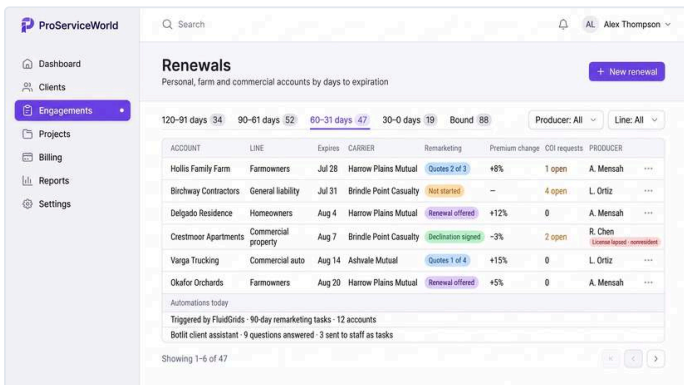


024 Psw 24 AI Engagement Health Feed



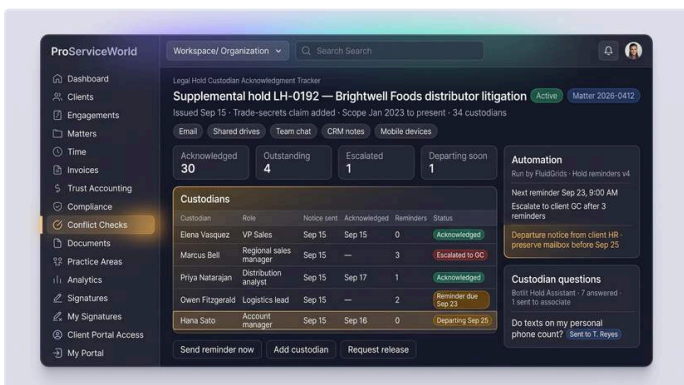
025 Psw 25 AI Prebill Readiness

INSURANCE · 1 SCREENS

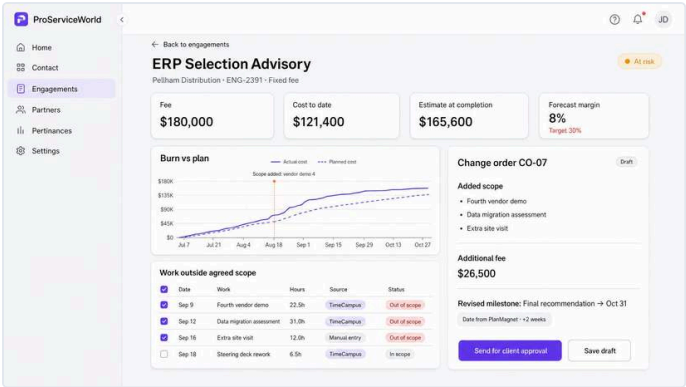


026 Insurance Agency Renewal Pipeline 1 Renewal Pipeline

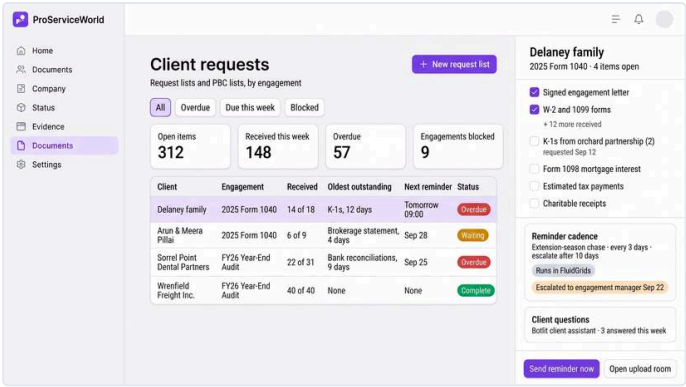
LEGAL · 1 SCREENS



027 Legal Hold Custodian Acknowledgment Tracker 1 Hold Tracker



028 Fixed Fee Engagement Burn And Change Orders 1 Engagement Burn



029 Tax And Audit Client Document Requests 1 Client Requests



Found someone who needs ProServiceWorld?

You do not need to be an expert in professional-services software to spot this opportunity. If a firm tells you its client list, its matters, its hours and its bills live in different places, that is the conversation. Send it our way and we will take it from there.

EMAIL OR CALL

Vignesh T.V.

vignesh@burdenoff.com

+91-7358445777

BOOK A 1-1 WITH VIGNESH

<https://calendly.com/vignesh-burdenoff/1-1>

ALL BURDENOFF PRODUCTS

<https://burdenoff.com/products>



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