

IMPLEMENTATION, MIGRATION & PRACTICE OPERATIONS

Expert hands on ProServiceWorld

ProServiceWorld is a platform your firm can run itself, but you do not have to do it alone. We help you adopt and get more from it, and we deliver done-for-you outcomes powered by it: implementation, migration, integrations, governance, and ongoing practice operations.

GROUNDED IN THE PLATFORM

COMPLIANCE & AUDIT THROUGHOUT

BUILT-IN WORKSPACE GOVERNANCE



01 Services across the ProServiceWorld lifecycle

ProServiceWorld is the operating system for professional-services firms: one governed workspace for clients, engagements, matters, documents, compliance, time, and billing. The services wrap around it.

Comprehensive professional services, every one grounded in a real platform capability. Engage one, or combine several into a program. The same loop applies whether it is a one-week setup or a multi-quarter rollout: scoped, reviewable, and governed at every step.



TRACK 01

Adopt ProServiceWorld

Consulting, implementation, migration, integrations, training, and enablement so your firm gets the full value of the platform, faster, and with governance from day one.

Practice Consulting & Discovery · Implementation & Configuration · Migration & Onboarding from Existing Tooling · Training for Professionals & Staff · Enablement for Teams · Integrations & Data Connectivity

TRACK 02

Powered by ProServiceWorld

Done-for-you outcomes we deliver using the platform (managed practice operations, compliance and governance advisory, and priority support) so you can focus on client work.

Managed Services & Practice Operations · Compliance & Governance Advisory · Support & SLAs

02 · TRACK ONE

Adopt ProServiceWorld

Consulting, implementation, migration, integrations, training, and enablement so your firm gets the full value of the platform, faster, and with governance from day one.

WE STAND IT UP WITH YOU

Configured to how your firm works

Our team works alongside yours to implement ProServiceWorld for your practice: workspaces, roles, engagement and matter templates, document rooms, billing arrangements, and the trust and compliance model wired to your service lines, so your team is working in it from day one.

2.1 Practice Consulting & Discovery

2.2 Implementation & Configuration

2.3 Migration & Onboarding from Existing Tooling

2.4 Training for Professionals & Staff

2.5 Enablement for Teams

2.6 Integrations & Data Connectivity

02 Adopt ProServiceWorld: design it and stand it up

2.1 · CONSULTING

Practice Consulting & Discovery

We map how your firm actually runs today (across finance, insurance, legal, accounting, or consulting) and design how clients, engagements, matters, time, and billing should live in one governed operating system.

- Current-state review of your CRM, practice/matter system, document store, and billing stack
- Engagement and matter model design for your service lines and fee arrangements
- Compliance, conflict-check, and engagement-acceptance workflow mapping
- Workspace, organization, and multi-office tenancy structure
- A scoped rollout plan with success criteria agreed before setup starts

2.2 · IMPLEMENTATION

Implementation & Configuration

We stand ProServiceWorld up for your practice: workspaces, roles, engagement templates, document rooms, billing arrangements, and the trust and verification model wired to how you work.

- Workspace, team, and role configuration mapped to real responsibilities
- Engagement, matter, and deliverable templates for your service lines
- Document rooms, retention, and legal-hold settings
- Billing arrangements: fixed, hourly, retainer, and value-based
- Verification, trust-badge, and client-portal setup

2.3 · MIGRATION

Migration & Onboarding from Existing Tooling

Moving off a tangle of spreadsheets, a legacy practice-management suite, or several disconnected tools? We migrate your clients, engagements, documents, and history with minimal disruption.

- Inventory of current clients, engagements, matters, documents, and access paths
- Data mapping and clean import of client and engagement records
- Document and version-history migration into governed document rooms
- Open-engagement cutover plan with parallel-run validation
- Go-live checklist and team handover

02 Adopt ProServiceWorld: train, enable and connect

2.4 · TRAINING

Training for Professionals & Staff

We get your people genuinely productive (partners, associates, delivery staff, account managers, and admins) with role-based sessions, not just a login and a wiki link.

- Hands-on workshops for each role in the firm
- Engagement, time-capture, and billing golden-path walkthroughs
- Compliance and conflict-check process training
- Client-portal and document-room enablement for client-facing teams
- Onboarding checklists and curated learning paths for new hires

2.5 · ENABLEMENT

Enablement for Teams

We help your firm turn the platform into a repeatable way of working (reusable templates, methodologies, and self-service) so the rollout sticks long after go-live.

- Reusable engagement, matter, and deliverable template libraries
- Methodology and quality-gate design encoded into the workflow
- Internal champion and admin enablement for ongoing ownership
- Adoption review and iterative refinement as usage grows
- Documentation of how your workspace is configured, in your firm's terminology

2.6 · INTEGRATIONS

Integrations & Data Connectivity

We connect ProServiceWorld to the rest of your stack (accounting and payments, identity, email, e-sign, and document sources) through the documented APIs, SDKs, and webhooks, so data flows instead of being re-keyed. Missing a connector? Tell us.

- Integration planning against the documented APIs and Node/Python SDKs
- Accounting, billing, and payment-system connectivity
- Identity/SSO and directory integration
- Document-source, e-sign, and email connections
- Webhook and event-driven automation between systems

03 · TRACK TWO

Powered by ProServiceWorld

Done-for-you outcomes we deliver using the platform (managed practice operations, compliance and governance advisory, and priority support) so you can focus on client work.

OR HAND US OPERATIONS

Managed services and practice ops

When you would rather focus on client work, we run the platform for your firm. We administer workspaces, roles, templates, and compliance configuration, keep everything current with each release, and report usage, quota, and audit back to firm leadership.

3.1 Managed Services & Practice Operations

3.2 Compliance & Governance Advisory

3.3 Support & SLAs



03 Powered by ProServiceWorld

3.1 · MANAGED SERVICES

Managed Services & Practice Operations

Prefer to focus on client work? We operate ProServiceWorld for your firm, administering workspaces, roles, templates, and compliance configuration, and acting on what the platform surfaces.

- Ongoing workspace, role, and template administration
- Compliance and conflict-check configuration upkeep
- Billing-arrangement and engagement-template maintenance
- Release adoption and configuration reviews each cycle
- Usage, quota, and audit reporting back to firm leadership

3.2 · GOVERNANCE

Compliance & Governance Advisory

For regulated practices, we help you operate confidently: least-privilege roles, conflict-check and acceptance flows, retention and data-residency policy, and audit-ready evidence on top of the inherited platform controls.

- Role-based access design and segregation-of-duties review
- Conflict-of-interest and engagement-acceptance workflow design
- Retention, legal-hold, and data-residency policy configuration
- Audit-trail and evidence-workflow setup for regulators and clients
- Independence and professional-conduct guardrails for your domain

3.3 · SUPPORT

Support & SLAs

Priority support tiers with defined response targets, a named contact for larger firms, and a clear path for issues, configuration changes, and roadmap input as your practice grows on the platform.

- Priority support tiers with defined response-time targets
- Named contact and review cadence for larger firms
- Configuration-change intake and prioritized handling
- Coordinated vulnerability and incident handling
- Roadmap input channel for your firm's needs

04 How we engage

A clear path from intent to impact. The same loop whether it is a one-week setup or a multi-quarter rollout: scoped, reviewable, and governed at every step.

01

Discover

We map your service lines, teams, tooling, and goals, and agree on what success looks like before any work starts.

02

Plan

A scoped, reviewable plan: engagement and matter model, roles, compliance workflows, integrations, and a rollout sequence.

03

Set up

We configure the platform, migrate your data, connect your systems, and validate everything, shipping in increments you can see.

04

Operate

We hand over with documentation and training, or stay on to run practice operations: governed and audited from the first day.

ENGAGEMENT MODEL

Engage one service, or combine several into a program.

PRICING

Contact us. Tell us about your service lines and goals and we will scope the right mix.

05 We leave your firm able to run it without us

Every engagement ships documentation, reusable templates, and hands-on training. Whether you keep us on to run operations or take the keys yourself, your people understand the platform, not just the screens.

- Role-based workshops for partners, associates, and admins
- Reusable engagement, matter, and deliverable template libraries
- Onboarding checklists and curated learning paths



HOW TO START

Let's scope what your firm needs

Tell us about your service lines and goals. We will recommend the right mix of setup, migration, integration, training, and operations, and a plan to get there.

TALK TO OUR TEAM

proserviceworld.com/contact

EXPLORE THE PLATFORM FIRST

proserviceworld.com/use-cases

GET STARTED

Let's scope what your firm needs.

Tell us about your service lines and goals. We will recommend the right mix of setup, migration, integration, training, and operations, and a plan to get there.

TALK TO OUR TEAM

proserviceworld.com/contact

EMAIL

contact@proserviceworld.com

PHONE

[+91-7358445777](tel:+91-7358445777)

SERVICES

proserviceworld.com/services

GET STARTED WITH THE PLATFORM

app.proserviceworld.com