A Function Paper from GRAIL

What does an AI-augmented professional services firm look like?

Professional services firm

Where the fee-earner engine is heading in the next two to three years, and what GRAIL believes it takes to get there first.

“Judgment stays with the professional. The practice prepares, remembers and checks.”

01 What are clients really buying when your hours disappear?

02 How much of your past work can teams trust today?

03 Where does your senior review arrive too late?

WHAT DOES AN AI-AUGMENTED PROFESSIONAL SERVICES FIRM LOOK LIKE?

Where the fee-earner engine is heading in the next two to three years, and what GRAIL believes it takes to get there first.

A professional-services firm sells judgment, yet much of its week goes to finding prior work, assembling drafts, reconciling plans and reconstructing the record. **The change that matters is that every assignment can begin with the firm's accumulated methods, evidence and review discipline already present.** Accountability stays with the professional. The work around it becomes reusable.

THE PROFESSIONAL'S 2028 DAY

01

Morning

Briefs changed requirements, unresolved decisions, drift, risks and approvals.

02

Before the work

Links scope, outcomes, plans, sources, staffing and review obligations.

03

In the work

Supports research, comparison, capture, drafting, testing and progress reporting.

04

Before release

Checks scope, standards, sources, calculations and known failure patterns.

05

The portfolio

Compares staffing options and surfaces margin, quality and renewal risk.

> *Judgment stays with the professional. The practice prepares, remembers and checks.*

GRAIL's view of the fee-earner engine. A position, not a survey.

THE FUNCTION TODAY

The product and the *economic engine*.

Professional-services delivery is both what the client buys and how the firm earns. Its management layer usually includes a business-area head or managing partner, practice and section leaders, engagement managers, senior professionals, junior professionals, and small bid, staffing, quality or project-control teams.

Nine processes

01	Lead-to-assignment and framework agreements	06	Knowledge capture, reuse and development of intellectual property
02	Staffing and utilisation planning	07	Subcontractor and delivery-partner coordination
03	Assignment delivery and project management	08	Client account management, expansion and renewal
04	Deliverable quality review and professional-risk control	09	Competence development, accreditation and succession
05	Time reporting, work in progress and invoicing		

Revenue comes through hours, fixed-price assignments, retainers, subscriptions, success fees and managed-service contracts. The economics depend on rate, utilisation, delivery mix, write-offs, rework, subcontractor spend and whether gains from faster work stay with the firm or pass to the client.

The traditional dashboard centres on revenue, order intake, backlog, utilisation, billable hours, average rate, realisation, engagement margin, write-offs, days sales outstanding, win rate, forecast accuracy, on-time delivery, claims, renewal and staff turnover. Utilisation dominates because it is easy to measure. It says little about client value or the productivity of fixed-fee work.

Information is scattered across the PSA or ERP, CRM, finance system, HR and skills records, document repositories, email, calendars, spreadsheets, CAD or BIM environments, bid libraries and individual memory. CVs, references, certificates, price assumptions and lessons learned are often less reliable than the formal record suggests.

The firm's expertise exists, but it does not reliably appear at the moment of delivery.

Senior people repeatedly correct basic content, teams recreate analysis they cannot safely find, and managers rebuild a picture that the firm's systems already contain in fragments.

WHAT CHANGES STRUCTURALLY

The hour weakens, the practice *compounds*.

The function changes in two connected ways.

The hour weakens as the unit of value. Research, drafting, comparison, checking and reporting can take fewer hours without becoming less valuable to the client. If the firm bills only for time, much of that gain leaves through a smaller invoice. Ambiguous advisory work can remain hourly. Bounded deliverables move toward fixed fees. Repeated work becomes a subscription, managed service or licensed method. Outcome-linked fees become possible where the result, baseline, attribution and allocation of risk are clear.

This is not a blanket move away from hours. Fixed fees transfer estimation and scope risk to the firm, and outcome pricing transfers more. Better scope, margin and outcome data must come before a new commercial promise.

Past assignments become an operating asset rather than an archive. Prior methods, calculations, clauses, designs, findings and review comments become available during live work, subject to permissions and reuse rights. Senior judgment becomes more reproducible. The same evidence supports bids, staffing, delivery, quality, learning, pricing and account work, so the boundaries between delivery, sales, knowledge management, HR and finance narrow.

> A firm stops selling only the professional time available today. It starts carrying forward what every assignment taught it.

> WHERE IT IS WEAKEST site attendance, client negotiation, physical inspection, novel engineering judgment, courtroom work and professional sign-off. These depend on accountable human judgment, and should.

THE 2028 OPERATING PICTURE

A day, a week, a *month*.

A firm that invests heavily still depends on professionals in 2028. Each assignment begins with a digital engagement record linking scope, commercial assumptions, client outcomes, the delivery plan, approved source material, staffing constraints and review obligations. The responsible professional reviews the substance and remains accountable for what leaves the firm.

The day

MORNING

Engagement leads receive a briefing on changed requirements, unresolved decisions, schedule drift, budget consumption, likely scope creep, quality exceptions and actions awaiting approval. Professionals see the relevant sources, prior examples, meeting records and required next steps. They decide what matters.

DURING DELIVERY

Bounded workflows support research, source comparison, meeting capture, first drafts, testing, calculations and progress reporting. Project status, dependencies, evidence, risks and budget remain current. The professional examines assumptions, adds context and directs the work.

BEFORE RELEASE

Material drafts are checked against scope, standards, cited sources, calculations, client requirements and known failure patterns. Reviewers begin with exceptions and supporting evidence instead of rereading every line equally. The named professional performs the substantive review, records approval and signs where the work requires it.

THE WEEK Staffing becomes continuous portfolio management. Section leaders compare team options using availability, competence, location, accreditation, client continuity, margin and development needs. Managers approve consequential moves and resolve the relationship, performance and learning considerations that records cannot settle.

THE MONTH The business-area head reviews fixed-fee margin, value delivered, scope leakage, reusable-method contribution, quality exceptions, pipeline coverage, skills bottlenecks, cash conversion and renewal risk. Their week centres on pricing architecture, major client choices, talent development, delivery risk and investment in reusable capabilities. Time remains an internal capacity signal, but it stops being the whole commercial story.

Every assignment starts better informed, every material deliverable receives structured review, and every completed engagement leaves the practice stronger than it found it.

PROCESS BY PROCESS

What runs, and what stays with the *person*.

PROCESS	WHAT THE AGENT DOES	WHAT STAYS WITH THE PERSON
Lead-to-assignment and framework agreements	Parses requirements, builds the compliance matrix, retrieves approved answers, matches verified experience, drafts with citations and flags unsupported claims	Bid or no-bid, win themes, price, contractual statements and submission
Staffing and utilisation	Produces alternative team plans, capacity conflicts, missing competencies, bench risks and development implications	Assignments, consequential moves, relationship and performance considerations
Assignment delivery and project management	Supports research, comparison, meeting capture, first drafts, testing, calculations and progress reporting; keeps status, dependencies, evidence, risks and budget current	Assumptions, substantive direction, client judgment and signed work
Quality and professional-risk review	Checks scope, standards, citations, consistency, calculations, precedent and known defects; presents exceptions with evidence	Substantive review, professional skepticism, recorded approval and sign-off
Time, WIP and invoicing	Proposes time entries from work records, flags weak narratives, unusual coding, budget breaches and unbilled milestones, and assembles invoice packs	Time approval, value adjustments, invoice approval and final posting authority
Knowledge reuse and IP development	Searches permissioned knowledge with citations, ownership, expiry dates and reuse rights; extracts methods and lessons at closeout	Steward approval, client-boundary decisions and the choice to turn a method into an offering
Subcontractor and partner coordination	Matches candidates, warns about expired credentials, prepares onboarding, tracks deliverables and reconciles invoices	Supplier selection and commercial commitments
Client account and renewal	Assembles relationship history, commitments, delivered outcomes, margin, delivery risks, contact changes and discussion points	Offers, discounts, outcome promises and difficult conversations
Competence, accreditation and succession	Turns review comments into learning cases, identifies certification gaps and proposes supervised practice and rotations	Assessment, progression, coaching and confirmation that experience has been earned

Read the right-hand column twice. It contains the accountability the client is buying. The left-hand column gives that accountability more evidence, more attention and more of the professional's week.

DATA AND CONNECTIONS

Four rungs, and the delivery-system *position today*.

The sequence follows business value and the consequence of a wrong action. It maps directly onto the rungs of GRAIL's Access Ladder.

01 **Documents only · The Access Ladder: Documents only**
Approved bids, CVs, references, methods, standards, contracts and prior deliverables support proposal drafting, knowledge retrieval, review checklists and training. The workflow has no live operational access. Matter permissions and reuse rights remain attached to every item.

02 **Read access · The Access Ladder: Read access**
PSA, CRM, finance, HR, calendar and project data add current capacity, rates, margin, pipeline, progress and credentials. Briefings and recommendations become useful during live work. People still perform every write.

03 **Read and act with approval · The Access Ladder: Read and act with approval**
Workflows prepare draft projects, proposed bookings, time entries, issue records, CRM notes and invoice packs. The responsible person sees the evidence. System validation and a named approver control the commitment.

04 **Bounded autonomous action · The Access Ladder: Bounded autonomous action**
Reminders, metadata updates, reconciliations and pre-authorised routing run inside monetary, contractual and risk limits. Bid submission, contract acceptance, invoice posting, professional sign-off and personnel decisions remain approved actions.

The delivery-system position, as of September 2026

Deltek Maconomy	Authenticated REST access and CRUD-aware resources are documented. The available documentation does not establish the principal cloud integration route.
Visma Severa	A REST API is documented for Business, Platinum and Enterprise editions. The available page does not establish every object or authentication path.
Milient	Product integrations are documented, with scope varying by connection. The available material does not document a REST API.
Marathon by KASE	The available product page does not document an API. Integration capability remains unverified.
CGI Advantage Connect	REST APIs and OpenAPI YAML are documented. The available page does not establish every authentication, webhook or logging capability.
Microsoft 365	Microsoft Graph is the production connection route. Work IQ MCP exposes read, create, update and delete tools with policy controls, while tenant eligibility and delegated identity still need validation.
Google Drive	The first-party remote MCP is in developer preview. Workspace APIs remain the production route.
HubSpot and Lime CRM	HubSpot supports governed CRM and activity reads plus selected creates and updates through its remote MCP. Lime CRM documents REST read and write access and webhooks.
Autodesk	Platform Services is the production route for documents, model data, translation and cloud workflows. Revit's public MCP is a read-only technical preview delivered as a separate Revit add-on.

Point connections answer current questions. A shared data layer becomes necessary when the firm wants historised margin, scope, staffing, quality, client outcomes and knowledge use across systems.

> In the headless model, professionals work through an engagement briefing and approval layer. The PSA, CRM, DMS and design systems retain records, permissions, validation and audit history. Every write records the acting identity, sources, retrieved evidence, workflow version, proposed action, before-and-after values, approval, timestamp and system response.

GRAIL'S THESIS

Six things we believe about the reusable *practice*.

Professional-services firms do not become AI-native by producing drafts faster. They change when expertise, commercial design, delivery records and learning begin to reinforce one another. Six beliefs define that change.

01 The hour is a capacity signal, not the product.

Faster work weakens an offer built only on hours multiplied by rate. The firm must know which work remains ambiguous, which deliverables can carry a fixed fee, and which repeated methods can become subscriptions, managed services or licensed tools.

02 The archive must enter the assignment.

A folder of past work creates no advantage when professionals cannot find, trust or reuse it. Methods, calculations, clauses, designs, findings and review comments need permissions, provenance and an owner before they can become live delivery infrastructure.

03 Every assignment should improve the next one.

Closeout should capture reusable methods, review lessons and known failure patterns for steward approval. Without that loop, the firm performs the same research, makes the same avoidable errors and remains dependent on who remembers the last engagement.

04 Quality should begin with exceptions, not exhaustion.

Senior review is scarce and often arrives late. Structured checks can cover scope, standards, sources, calculations and consistency before release, allowing the accountable professional to concentrate on the difficult assumptions and material departures.

05 Augment the work, never the judgment.

Research, retrieval, drafting, reconciliation and checking can be prepared around the professional. Scope, client promises, difficult advice, supplier commitments, personnel choices and sign-off stay with named people who understand what they are approving.

06 The learning system must change with the production system.

Junior development cannot depend on repetitive first drafts alone. Supervised client work, deliberate error finding, comparison with senior work, rotations and explicit sign-off ladders must preserve the path from novice to accountable professional.

An AI-augmented professional services firm does not know less because work moves faster. It remembers more, checks more consistently and gives its professionals more room for the judgment clients came to buy.

WHAT IT ASKS OF PEOPLE

Roles, rhythm, and where it *fails*.

Engagement managers become portfolio and exception managers. Senior professionals spend more time setting standards, reviewing difficult work, coaching judgment and handling clients. Bid managers become evidence and orchestration owners. Resource managers move from spreadsheet reconciliation to scenario decisions. Finance moves from chasing time to reading engagement economics. Knowledge managers steward provenance, permissions and reuse rights.

Professionals need structured problem definition, source verification, data literacy, commercial scoping, workflow design and the confidence to reject weak output. Juniors need supervised cases, deliberate error finding, comparison with senior work, client exposure and rotations. Managers must reward faster, better delivery without allowing utilisation measures to punish it.

The rhythm

FOUR TO EIGHT WEEKS	THREE TO SIX MONTHS	9–18 MONTHS	BY 2028
A documents-only workflow changes one team's bid, knowledge or review work	Read-connected briefings and recommendations become part of live delivery	Pricing, roles, data, incentives and portfolio management settle into one operating rhythm	Engagement records, continuous staffing, structured review and reusable offerings shape the practice

The sequence depends on document quality, permissions, integration, commercial design and the people responsible for the work. Integration, data correction and adoption usually demand more than raw model usage.

> WHERE IT FAILS Stale CVs and rates. Poorly classified documents. Generic review criteria. Utilisation incentives that punish speed. Fixed-fee scope leakage. Missing audit evidence. Excessive alerts. Partner resistance to knowledge sharing. Junior work removed before a replacement learning system exists.

The operating model changes only when fee earners, reviewers, resource managers, finance, knowledge owners and leaders redesign the work together. A tool can prepare the next action. It cannot decide what kind of practice the firm intends to become.

HAVE YOU THOUGHT ABOUT THIS?

Twelve questions for the professional-services *leader*.

1 A proposal service could prepare a cited first draft from approved bids, CVs and references, while a bid screen compares the opportunity with available skills, likely margin, client fit and delivery risk. Which tenders should begin with a verified compliance pack, and which should you stop pursuing?

2 A live staffing view could show feasible teams across confirmed work and pipeline. Could section leaders review staffing choices every week instead of rebuilding a monthly spreadsheet?

3 A scope monitor could compare client requests with the signed engagement and budget. How early could your managers see that a fixed-fee assignment is drifting outside scope?

4 A quality checker could test drafts against firm standards and client requirements before senior review. Which recurring defects should be checked on every deliverable?

5 A professional review record could preserve the sources, calculations, exceptions and approvals behind signed work. Could you reproduce what the responsible professional actually checked six months later?

6 A permissioned knowledge service could find methods and lessons from prior assignments without crossing client boundaries. How much work is recreated because people cannot safely find what already exists?

7 A pricing model could compare expected client value, delivery effort and downside risk before a fixed or outcome-linked fee is offered. Which recurring services are stable enough to stop selling by the hour?

8 A reusable method could become a subscription, managed service or licensed tool. Which part of your expertise is repeated often enough to become a product?

9 A project briefing could combine progress, budget, decisions, risks and client commitments each morning. Which management meeting could disappear if that briefing were trusted?

10 A learning service could turn senior review comments and past mistakes into supervised practice for juniors. What experience must juniors still gain when first drafts no longer teach it?

11 A client account view could show delivered outcomes, open commitments, margin, relationship gaps and renewal risks before each meeting. Would account leaders make different promises if the whole delivery history were visible?

12 Work records could prepare time entries and invoice packs, while the business-area P&L separates hours, retained productivity, reusable IP, subscriptions and outcome fees. Which approval should remain human, and what would you manage differently if utilisation stopped being the main measure of success?

These are the questions the programme is built to answer with the people who scope, deliver, review and lead the work, inside their own practice rather than from the outside.