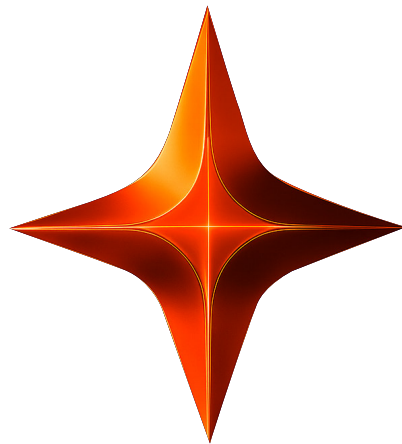




THE 2025 INTELLIGENT DELIVERY IDEABOOK

CURATED LESSONS ON
OPTIMIZING SERVICE
DELIVERY FOR THE AI AGE.

25 **HANDPICKED IDEAS**
FROM PROPEL25



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The #1 event for delivery professionals worldwide

The 2025 Intelligent Delivery Ideabook

25 **HANDPICKED IDEAS**
FROM PROPEL25



Jasmine Reynolds
appfire



Chase Potter
AlayaCare



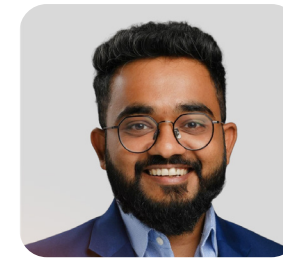
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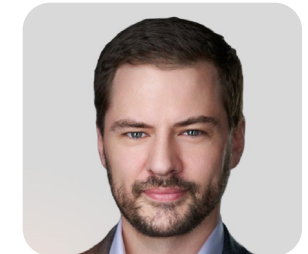
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To all the speakers, industry leaders,
and professionals who made Propel25 a
resounding success: thank you!

»rocketlane

Propel25

The #1 event for delivery professionals worldwide

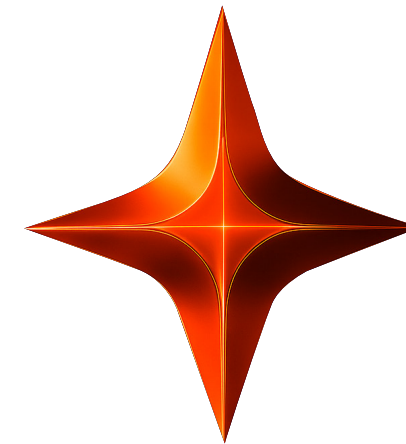


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This book is dedicated to our speakers,
customers, and community.

PREFACE

Building the Intelligent Delivery Organization

Welcome to the fourth edition of the Propel Ideabook!



When we started Propel in 2022, we focused on customer onboarding. By 2024, we had expanded to encompass professional services. Now, in 2025, we're taking a more fundamental look at what it means to deliver value to customers in an AI-driven world.

This year's theme centers on building "Intelligent Delivery Organizations" – companies that leverage AI not just as a tool, but as a core capability that transforms how they engage with customers, manage projects, and scale their operations.

The timing couldn't be more critical. As Ajeet Singh shared in our opening keynote, we're witnessing a transformation where going from idea to working prototype now takes hours instead of months. The implications for professional services and customer delivery are profound. We can no longer think about AI as something that makes existing processes faster – we need to fundamentally reimagine how work gets done.

What struck me most from our conversations with industry leaders this year was a recurring insight: the organizations winning in this new landscape aren't just using AI to automate tasks. They're using it to treat every customer as if they were their only customer – delivering mass personalization at scale while maintaining the deep relationships that drive retention and growth.

The ideas in this Ideabook reflect that evolution. You'll find frameworks for:

- Redesigning customer journeys with AI-first thinking
- Building delivery processes that learn and adapt
- Creating personalized experiences without sacrificing efficiency
- Measuring and communicating value in new ways

But perhaps most importantly, you'll discover approaches that help your teams embrace the "irrational courage" needed to make transformational change. As leaders, we can't wait for perfect data or complete certainty. The organizations that thrive will be those bold enough to experiment, learn fast, and commit to becoming fundamentally different.

Our community has grown stronger each year, and I'm grateful to every speaker, attendee, and practitioner who shared their insights. The collective wisdom in these pages represents thousands of hours of real-world experimentation with AI in customer-facing roles.

The future belongs to intelligent delivery organizations. This Ideabook is your roadmap to building one.

Here's to 2025 – the year we stop talking about AI transformation and start living it.

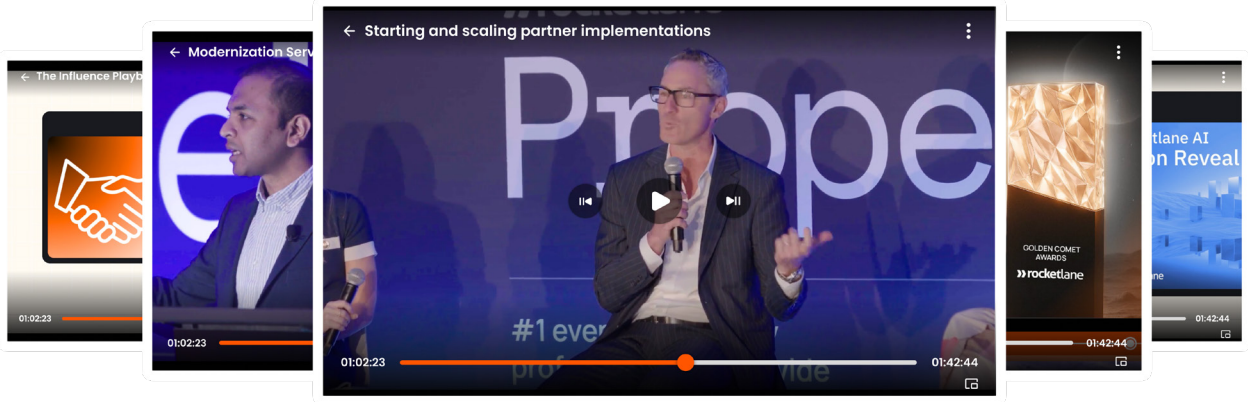
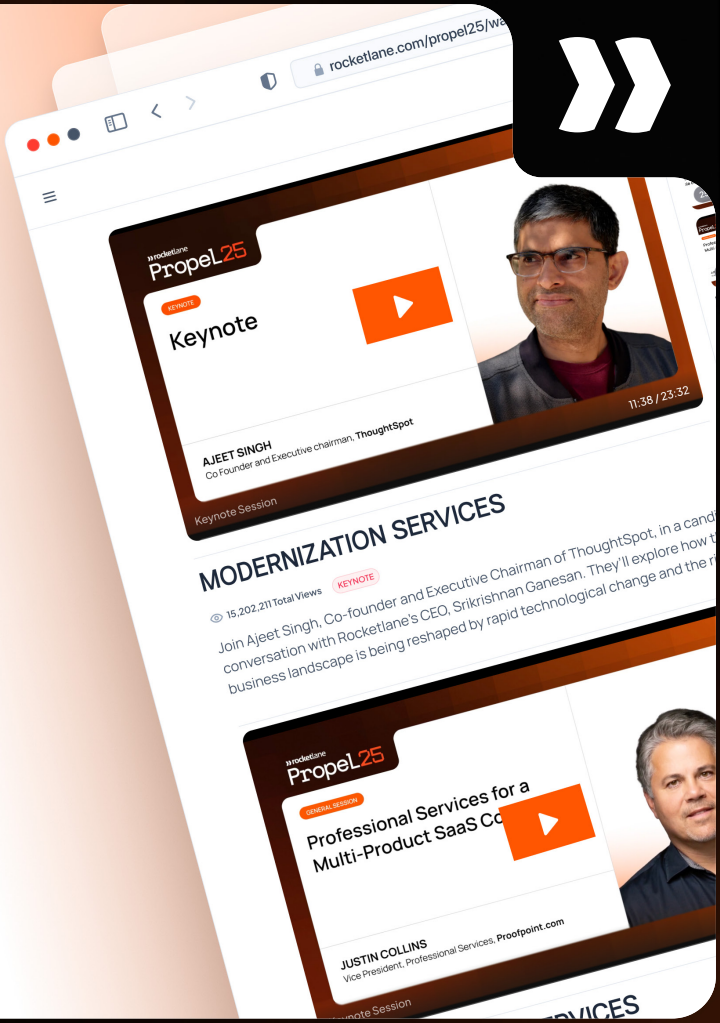
— **Srikrishnan Ganesan**
CEO & Co-founder, Rocketlane

All Propel25 sessions are now **available** on our website!

Watch Now →



Scan the QR code to start streaming.



#1

AI & INTELLIGENT AUTOMATION

Transforming service delivery with artificial intelligence

Using AI to modernize professional services and service delivery

BENJAMIN SANDMANN

VP WW -
Professional Services,
MongoDB



MongoDB’s professional services team compressed project timelines from 18-24 months to 3-5 months by rethinking modernization entirely. Here’s how his team achieved dramatic results that fundamentally changed the business case for enterprise transformation.

1. Think ecosystem, not components

The shift: Stop offering pointed recommendations and start overhauling entire application ecosystems. Simply replacing a database delivers minimal value if surrounding applications, business processes, and architecture remain unchanged.

The insight: Companies focus on 5% technology spend while ignoring 95% of costs from developer inefficiencies, legacy maintenance, and technical debt. True modernization requires transforming entire systems to suit the new era, not just component replacement.

2. Don’t restrict your AI strategy to code generation alone

The strategy: Break down complete workflows, identify time-intensive bottlenecks, then strategically integrate AI. In this instance, the team analyzed the entire software development lifecycle – analysis, design, coding, testing, and deployment to find high-impact automation opportunities.

The execution: Build agentic frameworks with closed-loop feedback systems, not just code generators. Result: reducing complex PL/SQL migrations from 800 hours to 90 hours, with Bendigo Bank achieving 3x development acceleration.

3. Compress timelines to reframe the business case

The transformation: When you reduce modernization from 18-24 months to 3-5 months, executives stop seeing “risky career moves” and start seeing “hero opportunities.” This timeline compression builds customer confidence and de-risks enterprise projects entirely.

The competitive advantage: As Sandmann notes, “We didn’t win just because our product was better. We won because we could compress timelines dramatically.” AI integration into delivery practices creates fundamentally different customer outcomes.

AI integration into delivery practices is becoming the primary competitive differentiator for professional services organizations, not just an operational efficiency tool.

How to implement AI transformation without alienating your team

BRIAN HODGES

CEO and President,
nCloud Integrators



Here's a few things about the PS industry that not many talk about: 51% of employees report burnout, 40% cite staff shortages as their biggest stressor, and 54% report working abnormally long hours.

With PS teams, there are generally six critical friction points: sales handoff breakdowns, overloaded project managers, inconsistent visibility, reactive escalations, manual task dominance, and lack of client accountability.

The solution here isn't to come up with another process that indexes on efficiency, but to develop a more empathetic approach towards the professional services team. Here's how you can do it;

1. The E.A.S.E framework

E.A.S.E expands to "Empathetic Automation for Services Excellence" and provides a structured path for change management:

1. **Evaluate** current workflows and document pain points
2. **Assess** opportunities by impact and effort required
3. **Strategize** implementation roadmaps with clear phases
4. **Execute** with proper measurement and scaling

Crucially, it prioritizes people first, process second, tools last.

2. Reframing the AI narrative

With any paradigmatic shift in technology, it's implicitly assumed that swathes of people will be 'replaced' with a machine that is better, faster, and cheaper. With AI, it would be prudent for teams to communicate that these tools are meant to 'relieve' people of some of their mundane tasks, and not 'replace' them altogether.

3. Change management in the age of AI

Automate with purpose not pressure, lead with empathy not fear, and make PS organizations places people want to stay. The future of professional services isn't just about speed, it's about creating more human, sustainable work environments.

The most successful AI transformations will be led by those who understand that technology amplifies humanity, not replaces it.

How to build an AI-first professional services team

SID PURI

Head of Growth - India,
Retool



Over 90% of all technology companies are actively investing in AI. Unfortunately, only 1% of them have managed to implement it. This gap comes from a profound misunderstanding of what it means to use AI, and how it can complement the workflows that are unique to certain organizations.

Retool is an example of a company that has managed to make AI work for them, and here's how they went about doing it:

1. Don't just consolidate, centralize.

Stop thinking about tool consolidation and start thinking about data centralization.

A modern PS tech stack should prioritize:

- ◆ Data interoperability: APIs that allow easy flow between tools.
- ◆ Shared ontology: A consistent model for customers, projects, roles, and outcomes.
- ◆ Contextual integration: The ability for AI agents to access, correlate, and act on cross-functional data in real time.

2. Integrate Software and Services for Competitive Advantage

Software and services do not exist in siloes anymore. AI is enabling the seamless integration of the two, creating more effective, tailored solutions. Companies like Retool are combining AI with professional services to develop custom tools that solve unique client challenges. For instance, using AI to automate internal workflows like time sheet management can significantly boost operational efficiency .

3. Redefine traditional roles

The typical solution architect is evolving into an "AI Agent Engineer". Someone who not only understands process design but can also orchestrate agents, prompt LLMs, and build thin tools atop APIs. Delivery managers will need to become outcome strategists. Technical consultants will become automation architects.

And it's already happening. OpenAI and Salesforce are hiring for these roles. Retool's own services team is evolving in this direction, branding roles around AI capabilities, not just delivery bandwidth.

Success in AI-first professional services requires centralizing data (not just tools), integrating software with services for competitive advantage, and evolving traditional roles into AI-specialized positions like Agent Engineers and Automation Architects.

A blueprint for intelligent service delivery

**CHASE
POTTER**

Vice President of
Professional Services,
AlayaCare



Any high-performing professional services team is marked by the extent to which they prioritise proactive value delivery (as opposed to reactive implementations).

AlayaCare managed to eliminate \$0 change requests by 50% while serving enterprise clients with 10,000+ hour implementations, here's how they did it:

1. Reimagine discovery to prevent scope creep

Minimal discovery leads to “Titanic-like icebergs” in implementations. By establishing baseline metrics during discovery, like tracking the count of your clients’ daily missed visits pre-implementation, you can shift conversations from feature comparisons to outcome achievements. In this case, one enterprise client saw missed visits drop from 44 to 15 immediately post-go-live, eliminating feature-to-feature debates and accelerating additional site deployments.

2. Modernize scoping with AI

Go beyond Excel templates and institutional knowledge. By using tools that leverage historical project data to recommend scope based on discovery responses, it is possible to reduce repetitive data entry tasks while increasing estimate rigor. This systematic approach cut AlayaCare’s \$0 change requests in half over six months, proving that intelligent tooling can balance speed with accuracy.

3. Focus your spotlight on high-value services

Stop illuminating the parking lot (basic configuration) and focus on the stage (strategic services). Through **lean waste analysis**, they identified non-value added activities and redirected resources toward industry expertise, solution architecture, and business optimization—services customers actually value and pay premium rates for.

Transform your PS organization from reactive order-takers to proactive value drivers by reimagining discovery, leveraging AI for scoping, and focusing human expertise on high-impact strategic services rather than basic configurations.

How to bake AI into implementation teams

**RAJ
RAJASEKAR**

CEO, saasgenie



Professional services teams struggling with lengthy SaaS implementations can dramatically accelerate delivery by targeting three critical bottlenecks with AI automation.

By focusing AI tools on data migration, configuration, and integration while maintaining human oversight for strategic decisions, organizations can reduce implementation timelines by up to 60%.

1. Target the 3 implementation killers

Data migration, configuration, and integration consistently derail project timelines. saasgenie's MigrateGenie tool has already processed over 10 million data rows across 300+ implementations, automatically handling 60-80% of field mappings that previously required manual intervention.

2. Deploy AI as an augmentation strategy

While AI handles repetitive tasks like data mapping and transformation, human consultants remain essential for gathering context and nuance that AI is currently not capable of doing. The sweet spot is using AI to eliminate "sleepless nights" over data validation while consultants focus on business context and customer success. One client reported their first peaceful sleep during a migration, a testament to AI's impact on reducing implementation anxiety.

3. Build for scalability through learning systems

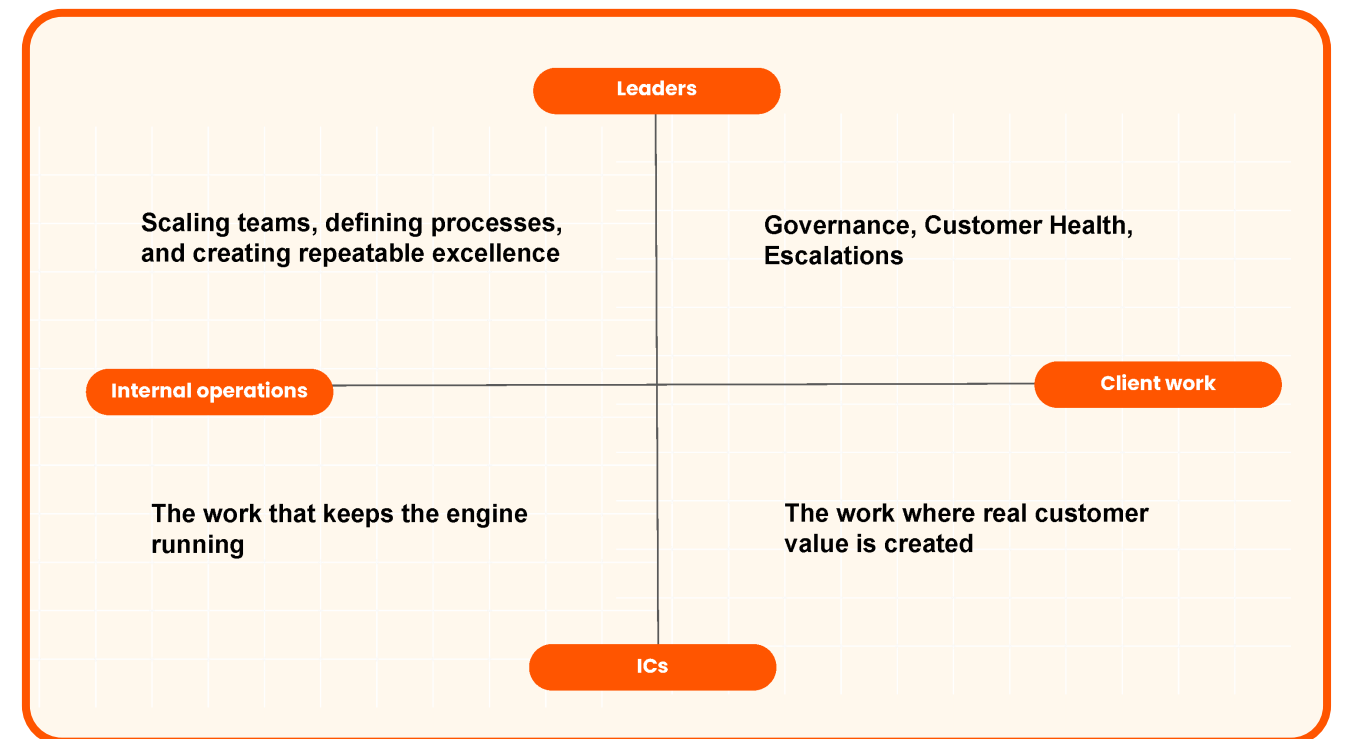
saasgenie's accelerators improve with each implementation, learning from custom object mappings and edge cases. With 15+ SaaS connectors already built, the platform scales both horizontally (more systems) and vertically (enterprise workloads). This learning loop creates compound value: each migration makes the next one faster and more accurate.

AI-powered automation can cut your SaaS implementation timelines by 60% when you focus it on data migration, configuration, and integration bottlenecks while keeping humans in charge of strategy and quality.



Rocketlane's AI Vision

Radical Efficiency: The Next Frontier in Service Delivery



Think of a workplace where your teams spend their time innovating rather than managing repetitive tasks, leaders effortlessly anticipate challenges, and each customer interaction is personalized, regardless of your growth.

We believe that any implementation of AI must bring clarity and effectiveness across all dimensions of your business, and we like to measure impact across two lines: the manner in which it helps leaders and individual contributors (ICs), and the extent to which it helps with internal operations and client-facing activities.

Accelerate project initiation and enhance delivery confidence

Rapid project kick-offs

Transition effortlessly from signed agreements to fully actionable projects, reducing setup time significantly. Teams are freed from manual planning and can immediately focus on delivering value.

Clearer communication and collaboration

Ensure every critical insight from sales discussions flows seamlessly into project delivery, improving client satisfaction and reducing costly misunderstandings.

Adaptability without disruption

Instantly and intelligently manage timeline adjustments, resource allocations, and task dependencies, ensuring your teams maintain project momentum and consistently meet deadlines, even amidst changes.

Deliver exceptional client experiences from day one

Error-free, rapid project setups

Ensure client configurations and complex data migrations are executed flawlessly by intelligent automation, significantly accelerating project timelines and boosting customer confidence right from the outset.

Always up-to-date, personalized documentation

Effortlessly create accurate, real-time documentation and status updates, capturing every important detail from client interactions. Your customers experience seamless communication and transparency, enhancing their trust and satisfaction.

Confidently manage risks and enhance operational excellence

Effortless compliance management

Automatically identify anomalies and streamline timesheet approvals, reducing errors and ensuring smooth, accurate compliance without manual intervention.

Proactive, real-time risk visibility

Maintain comprehensive, always-updated records of project risks, issues, assumptions, and dependencies, empowering your team to anticipate and mitigate problems before they escalate.

Intelligent, actionable alerts

Equip your team with proactive, personalized AI nudges, ensuring critical tasks are addressed promptly and effectively—maintaining project momentum and preventing costly delays.

Proactively strengthen client relationships and drive growth

Stay ahead of churn and escalations

Continuously monitor client interactions across meetings, emails, and projects, empowering your team to proactively identify risks and address potential churn before issues escalate.

Understand your customers deeply

Automatically uncover customer trends, recurring issues, and valuable feedback. Leverage these insights to continuously refine your service delivery, ensuring sustained customer satisfaction.

Strategically informed, effortlessly

Receive automated, personalized strategic reports that distill essential insights, enabling your leadership team to make informed, confident decisions without spending time on manual data analysis.

Scale without limits. Precision without compromise.

Rocketlane empowers teams to break the traditional constraints linking headcount to growth, enabling consistent, high-quality delivery across every project and interaction. Our AI vision isn't just about doing more, it's about fundamentally reimagining the way work is done.

H2

ORGANIZATIONAL TRANSFORMATION

Building the modern professional services organization

How to mature as a professional services org

**JUSTIN
MANDUKE**

Vice President of
Professional Services,
AuditBoard



Growth-stage SaaS companies face a counterintuitive challenge: the very practices that define what a mature professional services org is can actually prevent you from reaching that maturity if pursued too early.

The professional services-led growth reality

If your “product-led” motion requires extensive onboarding, configuration, or behavioral change to achieve ROI, you’re relying on services for growth. In this model, services teams don’t just implement—they uncover new use cases, inform product direction, and drive customer expansion.

How service leaders can overcome the growth paradox

1. Know your real growth model

Don’t buy the narrative that product alone drives value. If services are doing the heavy lifting for onboarding, adoption, or outcomes, acknowledge that and plan accordingly. Recognition is step one.

2. Get the order right:

Deliver → Scale → Optimize

Most teams get this backward under pressure. Delivery must be consistent before you scale. Scale must be predictable before you optimize for profitability. You can’t scale what you don’t fully understand.

3. Build maturity before chasing margins

Profitability must rest on operational maturity: clean data, reliable delivery tracking, accurate resource consumption metrics, and realistic forecasting. The “Rule of X” shows software growth remains 2.5x more important than profitability for valuations—but only if you have the foundation right.

Acknowledge that services may be driving your growth and sequence your priorities accordingly.

5 ways to drive internal transformation within your PS org

**JENN
BRANTMIER**

Principal Consultant,
CLV Consultants



System change is challenging, but the right approach can help you cut project management hours by 50%, eliminate unnecessary meetings, and boost utilization beyond 100%. Here's a proven playbook from Jenn Brantmier (Principal at CLV Consultants, former SVP Operations at Happy) shared at Propel25.

1. Observe and diagnose before proposing solutions

Start every transformation by understanding current workflows. Document existing processes, identify hidden inefficiencies, and ask probing questions. Surface issues like broken billing workflows or manual tasks that waste days. Build trust through understanding before suggesting changes.

2. Transform resistance into roadmap insights

Treat objections as valuable data, not obstacles. When you hear "this works fine" or "I prefer my spreadsheets," recognize these as emotional signals about sunk costs, status fears, or time concerns. Map common resistance patterns early to design smoother adoption paths.

3. Leverage customer voice for internal buy-in

Turn external feedback into internal momentum. Actively gather client requests for project transparency, better documentation, or faster updates. Present these customer needs to make change feel necessary, not optional. External pressure creates internal priority.

4. Set expectations for iterative improvement

Position your rollout as version one, not the final solution. Communicate that refinements will follow based on team feedback. This approach reduces perfectionism paralysis, lowers initial resistance, and creates space for organic adoption.

5. Build credibility through measurement

Track concrete metrics from day one: usage rates, time savings, efficiency gains. Use these numbers to secure budgets, expand adoption, and silence skeptics. Data-driven proof replaces opinion-based debates.

Start small, listen deeply, measure everything.

How to bring clarity to your PS organization

BRADLEY LIOU

Senior Director of Client
Success, MaintainX



Professional services teams often operate in chaos—unclear roles, inconsistent processes, and misaligned expectations. Bradley Liou, who scaled MaintainX’s PS team from 12 to 110 people, offers three frameworks that create organizational clarity at every growth stage.

1. Establish role clarity by mapping competence levels

Create a comprehensive job leveling matrix that defines exactly what success looks like at each level. Map specific competencies for P1 (entry) through P6 (principal) roles, including technical skills, customer interaction capabilities, and business impact expectations. This eliminates ambiguity around promotions and performance discussions.

Build your competency matrix before reaching 20 team members—retrofitting clarity becomes exponentially harder as you scale.

2. Define your customer journey ownership

Map every customer touchpoint from sales handoff through renewal, then assign clear ownership to specific roles. At MaintainX, implementation owns onboarding through go-live, while CSMs take ownership at the “ongoing adoption” phase. This prevents the common “throwing over the fence” problem between teams. Create visual journey maps showing exactly where PS fits, what KPIs you own, and how success is measured at each transition point.

3. Implement forcing functions via technology

Use your PSA or CRM platform to enforce the processes you’ve defined. If utilization tracking matters, make time entry mandatory for accessing other systems. If methodology compliance is critical, build stage gates into your project management tools. Technology should make the right behavior the easiest behavior.

Clarity enables organizations to scale efficiently. Ambiguity, on the other hand, creates exponential complexity. These frameworks ensure every team member understands their role, their impact, and their path forward.

Clarity isn’t a luxury in professional services—it’s the foundation that determines whether you scale or fail.

3 ways to take your PS org from a cost center to a profit driver

HALLIE DONOVAN

Director of Professional Services Operations, OpenGov



NAV KALRA

SVP of Professional Services, OpenGov



Nav Kalra, SVP of Professional Services at OpenGov, engineered a remarkable turnaround—from -50% to +30% gross margin in three years. His systematic approach delivered 10 consecutive quarters of positive margin and transformed PS into a strategic revenue driver.

1. Deploy real-time dashboards to drive daily accountability

Stop relying on monthly spreadsheet exercises that breed finger-pointing and confusion. Implement a business intelligence tool that consolidates data from your PSA, CRM, and HR systems into live dashboards.

Track utilization, budget health, project progress, customer satisfaction, and revenue forecasts in real-time. Schedule daily standups with managers to review metrics and address issues immediately.

Make performance visible, and accountability follows automatically.

2. Build standardized delivery while scaling through partners

Create consistent project templates and methodologies across all product lines—your 10 different approaches are confusing customers and killing efficiency. Document your delivery framework, train every team member on the same language, and enforce these

standards religiously.

Simultaneously, develop a partner ecosystem to handle demand variability. OpenGov grew their partner delivery from zero to 16% of capacity, achieving resource flexibility while maintaining higher margins through optimized partner rates.

Standardization enables scale; partners provide the flexibility to capture it.

3. Transform project management into customer value

Give customers direct access to their project plans and watch your data quality soar. When clients can see real-time project status, budget consumption, and upcoming milestones, your project managers suddenly become meticulous about updates.

If you want to fix margins, start by making performance visible, delivery repeatable, and value obvious to the customer.

5 AI-First leadership strategies to scale your Professional Services team

KAIVONA PARKER

Head of Enablement,
Training & Onboarding,
KPAgency, Inc



SHANAE BROWN

Executive Leadership Coach & Founder,
no cream in this coffee



MARIAH BAYNE

Career Coach and
CS leadership strategist,
AYC Consulting Group



Modern professional services leaders face an impossible equation: deliver more value with fewer resources while maintaining quality and team morale. The solution isn't choosing between AI and human capability—it's strategically combining both to create self-sufficient, strategic teams.

1. Deploy AI as your strategic operations partner

Transform AI from a writing assistant into your strategy consultant. Use it to analyze market research, develop competitive positioning, and create **SWOT analyses for strategic planning**. Feed consumer insights into AI tools to identify key themes and inform business decisions. This approach enables leaders to access executive-level strategic thinking without the executive-level budget.

2. Help teams turn uncertainty into action

Train your team to move beyond “I don't know what to do” by using AI as a thought partner. Encourage employees to input their initial ideas, then use AI to explore scenarios, translate concepts across departments, and develop multiple solution paths. This instills an ownership-mindset that encourages people to think strategically rather than seeking constant direction.

3. Master intent-action alignment with AI feedback loops

Before delivering critical feedback or strategic communications, input your message into AI tools to analyze potential takeaways. Ask:

Use AI as a strategic thought partner to create self-sufficient teams that think like business owners, not just task automation tools.

“What will the recipient understand from this message?” **This ensures your intended impact matches your actual delivery**, particularly crucial when managing diverse personalities and high-stakes conversations.

4. Acknowledge the emotional impact of AI adoption

Approach AI adoption in the same manner you would address grief, i.e. acknowledge resistance while positioning AI as an enhancement tool. Create communication plans that emphasize AI as an asset for creativity and strategic thinking, not a job replacement threat.

5. Make fewer, smarter decisions with AI-assisted prioritization

Use AI to regularly audit priorities by asking: “What activities are noise versus needle-moving?” This systematic approach helps leaders focus on high-impact initiatives while freeing team members from mundane tasks to pursue creative, strategic work that drives competitive advantage.



Join the #1 Community for Implementation Professionals

Become part of an exclusive community for post-sales leaders and practitioners managing customer onboarding, customer success, implementation, value delivery, and project management.

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join now



03

SCALING & OPERATIONS

Managing growth and optimizing
delivery processes

How to scale a PS org to Series A and beyond

**DANIEL
LEVINE**

Director,
Professional Services,
Clutch



When Clutch faced 20+ implementations in queue with zero documentation and a brand-new product, they didn't panic—they built.

Daniel Levine, Director of Professional Services at Clutch, revealed how his team transformed chaos into a scalable engine, reducing time-to-value from 6 months to 10 weeks while generating \$891,000 in services revenue. Here's their playbook for building professional services while actively delivering.

1. Build “taxis before subways” to deliver while you scale

don't wait for perfect methodologies. Hire highly agentic “taxi drivers” who can navigate ambiguity and deliver without detailed documentation. Let these team members take different routes to the same destination while you document patterns.

Progress from taxis (individual expertise) to buses (standardized routes) to subways (fully automated delivery) only after understanding your terrain. This approach enabled Clutch to reduce time-to-value from 6 months to 10 weeks while scaling to 50+ implementations.

2. Start charging for services before you need the revenue

begin monetizing implementation at Series A, even without pressure on margins or bookings. Set simple pricing at 20% of ARR and include it on every SOW—even if heavily discounted. Building sales muscle takes 6-12 months, so start before leadership asks.

Get your sales team comfortable selling services so new hires never experience a world without implementation fees. This foundation generated \$891,000 in services revenue within two quarters at Clutch.

3. Create self-improving documentation systems

build tools that anticipate obsolescence. Develop internal resources where users can update information in real-time as products evolve. Create browser extensions that show what's configurable, then allow any employee to add new discoveries to the database.

This crowdsourced approach keeps documentation current despite rapid product changes and eliminates the “Slack archaeology” that plagues growing teams.

Accept that you're building the plane while flying it. Focus on hiring adaptable talent, establishing revenue foundations early, and creating systems that improve through use rather than decay over time.

How to manage professional services in a multi-product org

JUSTIN COLLINS

Vice President of Professional Services, Proofpoint



Justin Collins, VP of Professional Services at Proofpoint, has scaled his organization from 2 people supporting one product to 140 people managing over 5,000 annual engagements across 23 products.

His experience reveals that success in multi-product environments depends on building a matrix organization that balances centralized resource efficiency with clear accountability, while maintaining deep product expertise through virtual practices.

Three Critical Success Factors:

1. Matrix organizational structure

Implement a dual-reporting system where managers align with sales teams for regional accountability while consultants report to these managers for career development only.

Technical resources pool centrally for project assignments, creating a matrix where operational deployment is separate from line management. This structure requires anywhere between 20-25 people across 3+ products to function effectively and enables fixed-price engagements that align with SaaS economics better than time-and-materials billing.

2. Virtual practices for product specialization

To maintain product depth despite resource pooling, create virtual (read: simulated) practices consisting of expert groups aligned to specific product sets. These teams interface directly with product and engineering teams, serving as a structured feedback loop for customer pain points and ensuring implementation challenges inform product decisions.

This approach prevents technical expertise from being diluted across the matrix while avoiding the resource hoarding that occurs with hard product boundaries.

3. Single-owner accountability with outcome metrics

Despite the matrix structure, assign dedicated project managers as single owners for each multi-product engagement, preventing the “two-in-the-box” failure where shared responsibility leads to no responsibility.

Replace traditional utilization metrics with customer-focused KPIs: satisfaction scores, implementation effort, time-to-value, and renewal rates. Accept that partial product adoption can still constitute success if overall customer renewal is achieved.

Multi-product professional services require an organizational matrix with pooled resources, virtual practices for technical depth, and single-point accountability, because without clear ownership, even the best structure will fail.

3 ways to automate your services delivery processes



GARY SORRENTINO
Global CIO, Zoom



JIM SIDERS
CIO, Palantir



KARTHIK CHAKKARAPANI
SVP & CIO, Zuora



KENNY SCANNELL
VP of Global Sales, Rocketlane



Leading CIOs predict 80% of professional services tasks will be automated within five years. Here’s how to position your organization for this transformation.

1. Bridge the gap between product promise and business reality

SaaS tools are built to sell, not to shape your business. **Professional services teams must blend domain knowledge with product expertise** to transform generic software into tailored solutions.

As Zoom’s Gary Sorrentino emphasized: teams should proactively guide clients, not just implement requests. Start by understanding the client’s “why”—what’s broken, what’s the cost of inaction, and what ROI will transformation unlock? The best PS organizations anticipate these questions, positioning themselves as transformation partners, not just implementers.

2. Build a foundation for data management before scaling AI efforts

Organizations achieving durable AI value **establish clean data architecture and governance protocols first**. Without proper infrastructure, i.e. data lakes with appropriate permissions and security frameworks, AI will only amplify existing problems instead of solving them.

Rushing to implement flashy AI without fundamentals leads to failure. Create cross-functional alignment between IT, audit, and security teams before any AI deployment.

3. Create innovation ecosystems beyond internal walls

Establish **AI experimentation zones that include external perspectives**. Zuora invites disruptive startups to pitch AI solutions during leadership meetings, keeping teams aware of market evolution.

Combine this with monthly hack weeks and “fail fast” POCs that can reduce implementation time by 80%. Set clear guardrails around sensitive data while encouraging rapid prototyping across departments.

AI won’t replace professional services, it will amplify teams that embrace experimentation and transformation mindsets today.

A framework for running professional services orgs

BRETT
JARVIS

VP of Customer Success,
Rocketlane



HAPPY
LUTHER

Principal,
Zenkara Consulting LLC



Professional services teams struggle with a harsh reality: most projects fail due to unclear expectations, poor handoffs, and lack of executive alignment. Here’s a structured approach to drive predictable project success.

1. Structure end-to-end delivery with the ignite method

break your project lifecycle into six manageable phases: **Initiate** (sales-to-PS handoff), **Goals** (business outcome alignment), **Navigate** (risk assessment), **Implement** (execution), **Transition** (PS-to-CS handoff), and **Elevate** (expansion opportunities).

Each phase requires specific deliverables—from kickoff checklists to RAID logs to transition plans. This comprehensive structure prevents the inefficient handoffs that plague 57% of failed projects.

2. Adapt sales qualification for services success

just as sales teams use **MEDPICC** to qualify deals, professional services need their own framework. Enter **METRICS**: validate **Metrics** (success criteria), Economic buyer **engagement**, realistic **timelines**, **tesource** readiness, **implementation** approach, **customer** alignment, and **strategic** risks.

Score each element red/yellow/green at kickoff and every milestone for instant visibility into project health. This seven-point diagnostic catches misalignment before it derails delivery.

3. Automate framework compliance with ai

transform manual processes through intelligent automation. AI can extract stakeholder commitments from sales calls, generate RAID logs from meeting transcripts, flag timeline risks through sentiment analysis, and create real-time project health dashboards.

This eliminates the administrative burden while ensuring consistent methodology adoption across all projects.

4. Start modular, scale systematically

don’t implement everything at once. Begin with the most critical gap, whether that’s fixing sales handoffs or establishing success metrics. Use templates for each phase, measure adoption rates, then expand. This modular approach lets teams realize immediate improvements while building toward comprehensive project governance.

Success in professional services requires frameworks that match the rigor of your sales process.

How to allocate resources to improve delivery times

GIAN LUIS DELGADO

Senior Manager,
Customer Success & Services,
LogicGate



Professional services teams often overlook their most powerful lever for accelerating customer success: strategic resource allocation. By rethinking how you deploy your people (not adding headcount), you can reduce time-to-value from months to weeks.

1. Deploy Implementation Experts During Pre-Sales

Eliminate costly handoffs by having your delivery team lead scoping conversations. Train these experts to identify hard deadlines like regulatory audits, flag critical dependencies between applications, and draft milestone-driven project plans before contracts are signed.

When the right subject matter experts understand customer needs from day one, implementation can begin immediately after signature—cutting weeks from your delivery timeline.

2. Make resource decisions using real-time data

Stop relying on static capacity models that assume equal effort across project timelines.

Supplement your forecasts with point-in-time availability data: analyze timesheets weekly, survey teams about upcoming commitments, and identify where senior resources can create maximum impact.

When high-priority projects emerge, reallocate your top talent by delegating their routine tasks to junior team members. This dynamic approach maintains aggressive time-to-value targets without adding staff.

3. Create non-negotiable accountability for realising first value

Build systems that make first-time-to-value (FTTV) everyone's priority. Track and review FTTV definitions and days-to-reach in leadership meetings.

Audit every kickoff to ensure teams explicitly discuss value milestones with customers. When customers hit their first marker—executing a risk assessment, completing a compliance review—formally celebrate the achievement.

This accountability transforms abstract “value delivery” into concrete wins that build momentum.

Your best people are your competitive advantage—deploy them where customers define value, not where your forecast says they should be.

2025 Professional Services Maturity Benchmark Report

PS teams are under pressure to deliver more value with fewer resources. In partnership with Service Performance Insight (SPI), this report shares data-backed strategies from 400+ companies on how to optimize capacity, embrace AI, and drive growth without adding headcount.



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The case for a next-gen PSA in 2025

Legacy PSAs weren't built for today's pace of delivery, AI, or client expectations. This guide breaks down what modern services orgs need from their PSA in 2025 and how next-gen platforms are helping them streamline operations, boost margins, and scale with confidence.

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04

CUSTOMER SUCCESS & DELIVERY

Optimizing the customer journey and reducing time-to-value

How to create a unified onboarding framework to cut implementation time

GRACE DIAZ

Operations Manager,
Actabl



AMANDA STEWART

Director of Implementation,
Actabl



At Propel25, Grace Diaz (Operations Manager) and Amanda Stewart (Director of Implementation) of Actabl shared how their team radically transformed onboarding—not simply because of a four-brand merger, but through a deliberate shift to a unified framework that prioritized consistency, scale, and speed.

The impact? A reduction in implementation time from 450+ days to as few as 33, \$16M in ARR, and a 4.5 CSAT in 2024. Here’s how they did it:

1. Standardize the experience to scale delivery

To eliminate fragmented customer journeys, Actabl introduced a six-phase model called “Verify-It” to “Own-It”:

- ◆ Verify-It: Define expectations and introduce teams
- ◆ Start-It: Align timelines and assign owners
- ◆ Build-It: Configure platforms and integrations
- ◆ Learn-It: Train admins and end users
- ◆ Review-It: Confirm readiness and share feedback
- ◆ Own-It: Go live with handoffs to success and support

This shared language enabled smoother handoffs and predictable milestones across brands.

2. Design for accountability—internally and externally

Actabl used Rocketlane’s customer portal to turn vague follow-ups into visible, actionable tasks. Ownership was crystal clear—avatars marked who owed what, while automated nudges kept things moving. Internally, milestone CSATs enabled course corrections, and role clarity ensured everyone was aligned.

3. Build with the end in mind: one tool, one source of truth

By choosing Rocketlane early on, Actabl set itself up for scale. Spreadsheets and scattered workflows gave way to a single project platform with full visibility. Amanda’s team could now manage 50+ concurrent projects confidently. Dashboards, automations, and templates streamlined delivery from day one.

Actabl’s success proves that speed, accountability, and scale come from aligning people, process, and platform around a shared framework.

3 tips to slash time-to-value

LISA
LAVAN

Director of Service Delivery,
Firstup



Time-to-value (TTV) is one of the clearest indicators of onboarding success—and one of the biggest levers for improving retention, satisfaction, and expansion. Here's how to shorten that timeline without compromising quality.

1. Use historical data to define first value milestones

Review 1–2 years of onboarding data to identify the patterns behind long-term success. Pinpoint the moment when early adopters start to see real results—such as a target registration rate, number of activated features, or specific usage thresholds. These should become your default first value benchmarks for new customers.

2. Build a shared launch plan around these milestones

At kickoff, align with customers on what success looks like—both long-term and in the first few weeks. Collaboratively create a launch plan that targets your TTV milestones and includes the actions needed to get there. Use data and examples from similar customers to guide strategy, build trust, and set clear expectations.

3. Make progress visible with integrated measurement

Embed real-time tracking into the customer experience. Dashboards that show activation, engagement, and reach help customers recognize value early and often. When customers can see their own progress toward defined goals, they stay engaged—and teams can intervene early when progress stalls.

Reducing time-to-value isn't about speed for its own sake. It's about making early value tangible, measurable, and repeatable.

Define value early, build a plan to hit it fast, and make every step visible.

How to transform customer handoffs into competitive advantage

KATE
BRADY

Shared Services Continuous Improvement Leader, OneSource Virtual



Customer handoffs are too often treated as checklist items. Kate Brady, SVP of Global Services at OneSource Virtual, argues they should be treated as competitive leverage.

Across her 16 years of building onboarding teams, one insight emerged: churn rarely comes from product gaps—it stems from poor transitions. Fix those, and you fix the customer experience.

1. Make context your currency

Most sales teams collect months of rich customer insight (emotional drivers, strategic goals, and deal rationale) only to pass along stripped-down contracts. The fix isn't more documentation. It's direct involvement.

Invite downstream teams to sales calls, discovery meetings, and workshops. Then build a living customer playbook to capture what doesn't fit in CRM fields. Context, when shared early and often, shortens ramp time and deepens trust.

2. Measure what matters between teams

Traditional metrics focus on team-specific outcomes. Brady recommends handoff scorecards and pulse surveys that measure transition quality. Align all teams on a shared goal like time-to-first-value. When everyone rallies around the same outcome, collaboration replaces confusion.

3. Design for two customers

Your external customer funds the relationship, but your internal customers, the ones who pick up after you will be carrying it forward. Ask yourself: would I feel confident receiving this handoff? Every internal gap becomes an external crack.

4. Turn mindset into mechanism

Don't stop at empathy. Operationalize it. Form a cross-functional customer journey steering committee. Appoint a single journey owner. Define rituals, align metrics, and revisit handoffs often. When every team shares responsibility, handoffs become seamless and strategic.

When every team owns the journey, handoffs stop being drop-offs, and start becoming moments of differentiation.

How to build resilient onboarding teams

JASMINE
REYNOLDS

Director of Enterprise
Customer Success,
Appfire



Onboarding failures rarely happen all at once. More often, they emerge from a chain of small, overlooked assumptions—each one compounding until the customer questions the value of the partnership. To prevent these silent breakdowns, onboarding teams need to rethink how they identify and manage risk.

1. Build a risk web

Most onboarding teams look at risk in isolation, tackling issues one by one. But risks are rarely standalone—they're connected. A single oversight, like failing to include IT in a kickoff, can delay access, stall configuration, and trigger executive concerns about value. Instead of reacting late, teams should visualize risk as a web.

Start by naming one small issue—the first domino. Then identify what gets immediately affected, such as missed approvals or incomplete setup.

From there, trace second-order effects like timeline slips or trust erosion. Often, these risks loop back, reinforcing each other in ways that accelerate failure. To break the cycle, teams must embed “stoppers”—deliberate checkpoints and blockers that absorb impact before it spreads.

2. Deploy the DIVE methodology for systematic risk prevention

Use Jasmine's DIVE framework to proactively uncover and mitigate hidden risks:

- ◆ **Discover** vague language and implicit assumptions.
- ◆ **Investigate** the dependencies each risk touches.
- ◆ **Validate** readiness through evidence, not intuition.
- ◆ **Engineer** resilience with friction points designed to slow down failure.

This approach prevents issues like misaligned data ownership or misinterpreted access requirements from snowballing into larger delays.

3. Institute recurring retrospectives to build organizational memory

Conduct retros after every onboarding irrespective of how successful they were. Use them to capture lessons, update processes, and maintain a backlog of improvements. Over time, this turns individual learning into institutional strength.

Resilient onboarding isn't about reacting better, it's about designing systems where failure struggles to take root.

3 strategies to reduce churn

AJ
TJADEN

Director of Customer Experience, Syndicately



How do you transform a churn crisis into \$1.3 million in recovered revenue?

That’s what AJ Tjaden and his team at Syndicately did by eschewing AI shortcuts in favor of diving deep into customer data.

Here’s how professional services teams can replicate his success:

1. Triangulate truth through three data lenses

Stop relying on single data sources. Tjaden’s breakthrough came from comparing what customers directly say, what internal teams assume, and what usage data reveals.

At Syndicately, customers claimed they were “too expensive,” teams thought users weren’t engaging, but data showed the real issue: 54% of churning customers were monthly subscribers with unclear onboarding paths. This three-lens approach exposed blind spots that NPS scores and surveys miss entirely.

2. Part ways with bad-fit customers pre-emptively

After discovering that 77% of churned customers shared three traits (monthly billing, banking/finance sectors, under 50 users), Tjaden implemented a controversial policy: **reject prospects matching two of these criteria.**

Sales protested until he offered to let them handle the onboarding personally. Result? Monthly customers dropped from 54% to 26%, while yearly contracts surged from 46% to 74%.

3. Launch a customer advisory board (CAB)

Instead of begging for feedback, make it exclusive. A CAB was assembled every quarter and featured a mix of customers from multiple segments. Key teams joined these calls, and it created a strong engagement loop.

Tjaden’s customer advisory boards became so coveted that clients offered multi-year contracts and upfront payments just to participate.

The key: limit access to customers with 6+ months tenure and maintain strict quotas. This scarcity mindset turned a cost center into a revenue driver.

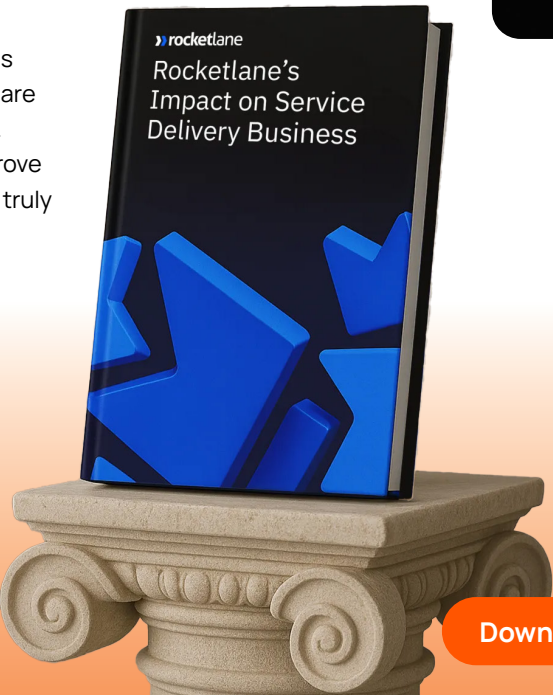
When you make customer input exclusive rather than expected, you transform feedback from a chore into a privilege: one that customers will literally pay to access.

The Rocketlane Impact Report

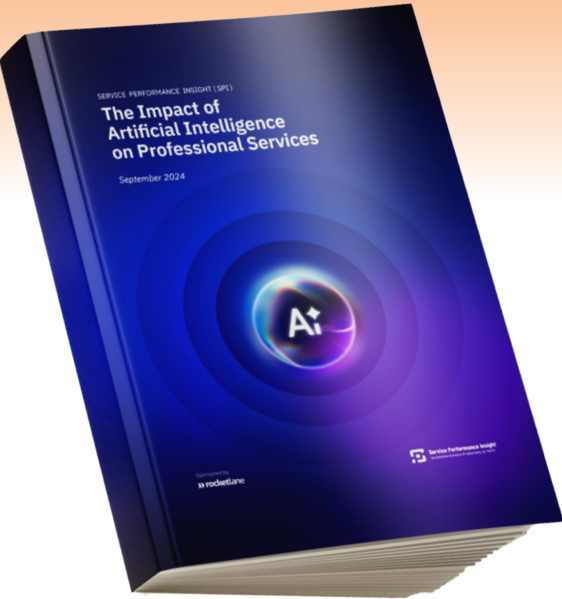
If your org feels “busy” but not profitable, this report explains why. Discover how PS teams are achieving radical efficiency with Rocketlane. Learn how to replicate their playbook to improve margins and free up teams to focus on what truly moves the needle.



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The Impact of AI on Professional Services

From staffing to delivery to insights, AI is redefining PS operations. Learn where AI is delivering real results and how to bring it into your workflows.

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05

STRATEGIC GROWTH & INNOVATION

Productization, partnerships, and the future of services

How to productize services for scale

**MARK
SLOAN**

Managing Director,
Asaph Advisors



Mark Sloan, Managing Director at Asaph Advisors, has led services organizations through rapid growth, including scaling a team from 8 to 1,600 people and achieving \$400M in revenue.

At Propel25, he introduced a bold framework to help professional services leaders move from reactive delivery to scalable, predictable growth. His method, Services as a Product (SaaP™), offers a repeatable playbook for performance and profitability.

1. Productize services to eliminate ambiguity

Today's buyers expect clarity on pricing and timelines from the first conversation. Sloan urges teams to stop saying "it depends" and instead define fixed-scope offerings with clear deliverables, SOWs, pricing, and templates. One client used this approach to drive \$100 million in new revenue in just 18 months.

2. Clarify sales and delivery roles to speed up deals

SaaP requires clearly defined responsibilities across sales and services. Establish pre-approved scopes that sales can run with, and a separate track for offerings that require review. This reduces handoffs and accelerates deal velocity.

3. Forecast with accuracy, not guesswork

By translating the sales pipeline into a resource pipeline, Sloan reduced projected headcount needs from 400 to just 12. Aligning hiring plans with deal probability helps organizations scale without overextending.

4. De-risk delivery with standardized toolkits

Move away from ad-hoc methods by codifying your expertise into structured, reusable toolkits. These enable consistent delivery quality, empower junior teams, and protect margins by reducing senior dependency. A streamlined toolkit includes:

- ◆ **Pitch Deck:** Clearly states the business problem, solution, and expected impact.
- ◆ **Case Studies:** Validate results and ROI.
- ◆ **Pre-built SOWs:** Define scope, assumptions, pricing, timelines, and resources upfront.
- ◆ **Templates & Checklists:** Standardize requirements, deliverables, and onboarding processes.

Standardization accelerates implementations, ensures predictable outcomes, and provides a scalable foundation for growth.

Adopting a product mindset for services through clearly defined roles, accurate forecasting, and structured toolkits drives predictable growth, accelerates deals, and safeguards margins.

How to start and scale partner implementations

STEPHANIE RAHMAN

Vice President,
Professional Services, Clari



CHRIS DARIUS

CFO, nCloud Integrators



HANNAH MCCLURE

Senior Manager, Implementation
Services, LogicGate



Stephanie Rahman (VP of Services Strategy, Clari), Chris Darius (CEO, nCloud Integrators), and Hannah McClure (Senior Manager, Implementation Services, LogicGate) share proven strategies for achieving 40% efficiency gains while delivering superior customer outcomes through service productization.

1. Package your expertise into modular service products

stop building custom solutions from scratch. Create standardized deployment packages with customizable components that maintain flexibility while ensuring predictable delivery. Define 3-5 core service tiers based on customer segments and complexity levels.

Build each tier with plug-and-play modules that address specific use cases. This approach will reduce your onboarding time by 35% and enable your team to serve 3x more customers without proportional headcount increases.

2. Use consumption data to design your service portfolio

track usage patterns across all implementations to identify recurring needs. Analyze time-to-value metrics, adoption rates, and support ticket trends to discover your core service archetypes.

Focus on the 5-7 patterns that cover 85% of client requirements. Price each archetype based on value delivered, not hours worked. This data-driven design eliminates scope creep and enables precise resource forecasting.

3. Establish a cross-functional service innovation council

form a quarterly council with representatives from PS, CS, Product, and Sales. Task this group with co-creating productized offerings based on customer feedback and market demands.

Give them authority to standardize processes and sunset underperforming services. This collaborative structure will increase customer satisfaction by 25% and accelerate service deployment by 30%.

Leverage strategic partnerships and standardized service products to scale efficiently and sustainably.

4 tips to build a high-performing CX growth engine

KASEY SMITH

Head of Operations, Customer Experience, and Integrations, Graphite Connect



Kasey Smith, Head of Operations, CX, and Integrations at Graphite Connect, shared how his team reimagined the post-GoLive experience to boost customer satisfaction, internal alignment, and renewal outcomes.

Faced with rising complexity from highly configurable enterprise products, Kasey and his team transformed post-launch CX from a reactive burden into a structured, scalable operation that drives real business impact.

Here's what he recommends:

1. Elevate customer success to technical ownership

Graphite replaced traditional Customer Success Managers with Technical Account Managers (TAMs) who are product-savvy and execution-focused. This shift ensured that customers had go-to experts who could own requests end to end, increasing trust and eliminating confusion across departments.

2. Apply a sprint framework to CX

By introducing a monthly sprint cadence for customer requests, Graphite brought structure to what was previously chaotic. Each sprint included intake, prioritization, execution, and delivery. This rhythm created predictability and improved planning for both internal teams and customers.

3. Extend familiar tools beyond the Go-Live process

Rather than introducing a new CX platform, Graphite continued using Rocketlane beyond implementation. This kept communication and tracking in one place, increased adoption, and provided visibility into every customer interaction, thanks to integrated JIRA workflows and audit logs.

4. Leverage time tracking to inform pricing

Using Rocketlane's time tracking across live accounts, the team identified high-effort customers and adjusted pricing and renewals accordingly. This added transparency, accountability, and strategic clarity to every renewal conversation.

After GoLive, give customers a dedicated expert, work in monthly cycles, stick to familiar tools, and use time data to guide pricing and renewals.

How AI is disrupting professional Services

**SRIKRISHNAN
GANESAN**
CEO, Rocketlane



Transform your professional services organization from a cost center into a strategic differentiator by leveraging AI agents that can reduce customer onboarding time from days to minutes while maintaining enterprise-grade reliability and human oversight.

Here are four ways to reshape your professional services delivery with AI:

1. Automate the core, not just admin tasks

Stop limiting AI to administrative overhead. The real opportunity lies in automating the substantive delivery work itself: configurations, implementations, and technical setups. When AI handles complex deployments that previously required senior consultants, your team can focus on strategic advisory and customer outcomes.

2. Leverage purpose-built AI tools for professional services

Generic AI won't cut it for specialized PS workflows. Adopt platforms designed specifically for professional services that separate planning from execution for enterprise reliability.

Tools like Rocketlane's AI workforce combine agents, action models, and intelligent documentation to transform sparse handoffs into comprehensive briefings while maintaining complete audit trails. Join beta programs now to gain early competitive advantage.

3. Rebrand as an "Intelligent Delivery Organization"

Words matter. Stop calling it "Professional Services" internally. Rechristen your team as an "**Intelligent Delivery Organization**" to fundamentally shift your team's mindset.

This isn't cosmetic; it's about creating daily reminders that your competitive edge comes from being smart, nimble, and radically efficient. Make intelligence and automation core to your team's identity.

4. Create a systematic approach to AI learning

AI capabilities are evolving weekly. Establish regular learning rhythms through resources (like our very own Rocketlane TV) and other industry communities. Your ability to continuously adopt new capabilities will determine whether you lead or lag.

Your future competitive advantage isn't in what AI can do for you. It's in what you choose to do with the time AI gives back.

How Rocketlane uses Rocketlane: 5 proven workflows for customer success

MONICA
MADAN PAUL

Manager - Support
and Education,
Rocketlane



VISHNU
PRASAD

Head of Customer Success
Rocketlane



Monica (Head of Support & Education) and Vishnu (Head of Customer Success) from Rocketlane demonstrated how they “drink their own champagne” by using Rocketlane’s platform to scale from a tiny startup serving small clients to a Series B firm serving enterprise clients.

These five workflows showcase how modern professional services teams can deliver consistent, exceptional experiences.

1. Automated project creation from CRM

When deals close, Rocketlane’s CRM integration automatically creates projects with **customized templates based on customer data**. Using forms and dynamic templates, they transform sales information into tailored project plans, eliminating manual setup and ensuring no details are lost in handoff.

2. Using key events and intervals for at-risk projects

Native automations monitor project health and send **Slack alerts before deadlines approach**. This proactive workflow means teams address potential delays before customers even notice, transforming crisis management into preventive care.

3. Data-Driven governance dashboards

Leadership visibility evolved from “four red, three green projects” to comprehensive dashboards showing project delays, stale initiatives, and team performance. Teams start each week reviewing this **single source of truth** to prioritize efforts.

4. Customer portal for transparency

Beyond static project plans, Rocketlane built a website-like experience where customers track progress, access resources, and connect with project managers via embedded Calendly links—creating **24/7 visibility without constant emails**.

5. AI-powered meeting intelligence

Their AI assistant captures meeting notes, summarizes requirements, and automatically creates action items within projects. Implementation managers stay **100% focused on customers** while AI handles documentation, ensuring nothing falls through the cracks.

At Rocketlane, we practice what we preach, and have developed our own workflows that helped us grow from reactive chaos to proactive excellence.



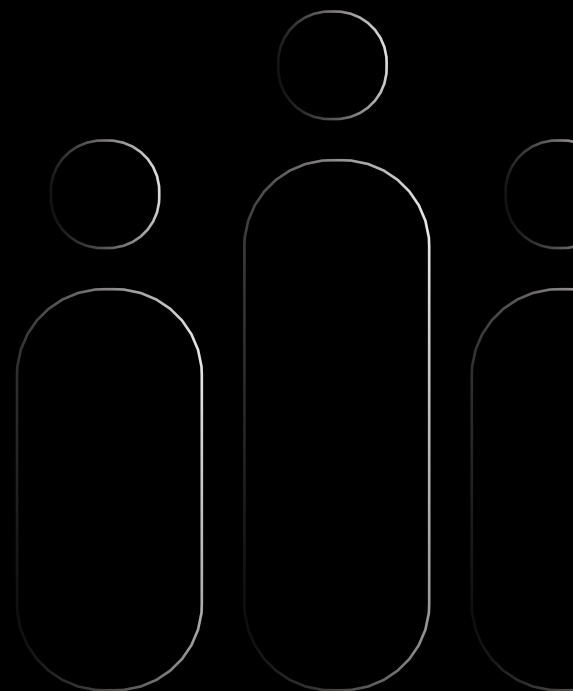
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EPILOGUE

The future of delivery is intelligent.

We're incredibly grateful to all the speakers who brought their boldest thinking and real-world experiments to Propel25. From AI-powered customer journey redesigns to entirely new approaches to value delivery, everyone embraced the challenge of sharing not just what works today, but what's possible tomorrow.

If 2024 was about productizing services, then 2025 is clearly about making those services intelligent. The ideas in this book represent more than incremental improvements, they're blueprints for organizations ready to fundamentally reimagine how customer value gets created and delivered.

What excites me most is how our community has evolved. Two years ago, we were discussing best practices for onboarding. Last year, we explored productizing services. This year, we're designing the future of customer delivery itself. The conversations happening in our hallways and breakout sessions are shaping entire industries.

A special thanks to everyone who joined us for our second in-person Propel. Your energy, questions, and willingness to challenge conventional thinking made this our most transformative event yet. Watching teams leave with concrete plans to pilot AI-driven delivery processes – that's the real measure of success.

We'd also like to acknowledge the practitioners and leaders who are living these changes daily. Your courage to experiment, your willingness to fail fast and learn faster, and your commitment to putting customers first – that's what's driving this transformation.

As Ajeet reminded us in his keynote, we're all in a massive hackathon right now. The organizations that emerge stronger will be those that embrace the uncertainty, commit to the experiment, and build intelligence into every customer interaction.

We will meet again next year, and in the meantime, please write to us at propel@rocketlane.com with stories of your experiments, wins, and hard-won lessons.

— **Srikrishnan Ganesan**
CEO & Co-founder, Rocketlane

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