

// XIP FOR PROFESSIONAL SERVICES

You know your people are busy. Do you know what the work costs?

Project, time, billing and payroll systems each hold part of the truth. In most firms, fragmentation hides what the work really costs. XIP puts one intelligence layer over all of it, so you can ask a plain question and understand what's going on across the business.

The month closes late

Time, WIP and invoices reconcile weeks after the work. Project losses show up when it's too late to fix them.

Your staff already use AI

Often with client-confidential material, on personal accounts, with no oversight and no audit trail.

Another system won't fix it

A new practice-management or ERP rollout takes 12 months or more, and your people still end up back in spreadsheets.

// WHERE THE MARGIN GOES

Work sold → Hours logged → Billed → Collected

Scope creep, unbilled time, write-offs: the leaks live between systems. XIP connects to the systems you already run. Read-only to start: nothing is replaced, nothing is migrated. It builds one live picture of the business across all of them. Then you ask questions in plain language and get answers drawn from your own records. **Works with the systems you have. Replaces none of them.**

// QUESTIONS IT ANSWERS ON DAY ONE

- Which clients and projects actually make money?
- What is our utilization?
- Where is cash stuck: unbilled work, invoices past 45 days?
- What did scope creep cost us last quarter?
- Do we have capacity for the work we just sold?

HOW IT WORKS, AND HOW IT STARTS, ON THE NEXT PAGE →

// HOW IT WORKS: ONE LAYER ACROSS YOUR SYSTEMS

XIP sits over practice management, time tracking, CRM, accounting and payroll. Each system keeps doing its job. XIP is the intelligence across them: it sees the whole picture, answers questions, flags problems, and provides solutions. **It is an agentic system, not another dashboard. You don't assemble reports to find the problem. You ask.**

Practice mgmt

Time tracking

CRM

Accounting

Payroll

Spreadsheets

XIP · THE INTELLIGENCE LAYER ACROSS ALL OF THEM

// BUILT FOR CLIENT CONFIDENTIALITY: SAFE TO POINT AT CLIENT WORK

XIP plugs into the identity system you already use (Microsoft 365 or Google). Every person and every AI agent works inside the permissions they already have, and every access is recorded. Confidentiality is enforced by the platform, not a policy memo.

- ✓ Access scoped by client, project and role
- ✓ Client data sealed, never used to train models
- ✓ Complete audit trail of every access and action
- ✓ Runs fully inside your environment if you require it

// HOW IT STARTS

// 01 · SOLVE

Start with the biggest problem

Utilization and true project cost, visible across all your systems, in one place.

// 02 · EXPAND

Take on the next ones

Scope creep, capacity planning, cash. Each answer builds on the same foundation.

// 03 · GROW

Grow into the platform

More connected systems, more questions answered, at your pace.

Fixed scope, fixed price, evidence-gated. Each phase is proven before the next is scoped, and it is sold as modules: the first win doesn't require buying a platform.

// RUNNING IN PRODUCTION TODAY

A multi-site services organization runs its day-to-day operations on this platform: payroll, staffing, service-to-collections and cash position, on live data.

// ALSO DEPLOYED

A nonprofit services provider runs a fully hosted operations hub built on the same platform.