



More billable hours, fewer missed deadlines

NeodyAI for Professional services · Agencies, consultancies, law and engineering firms

Where the time goes in professional services



Unbilled time leaks

Hours worked never make it onto an invoice, or reach it late.



Proposals from scratch

Every pitch is rebuilt by hand from old documents and emails.



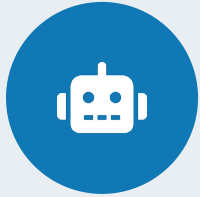
Deadlines in spreadsheets

Matter and filing dates are tracked by people, not by the system.

NeodyAI takes on this work with AI that prepares, checks and chases, while your people decide.



AI does the work. Your team stays in control.



AI does the work

Reads documents, checks them against your rules, drafts and follows up across the systems you already use.



Your people decide

It runs beside your team first. Autonomy is earned on measured agreement, and taken back automatically when quality drops.



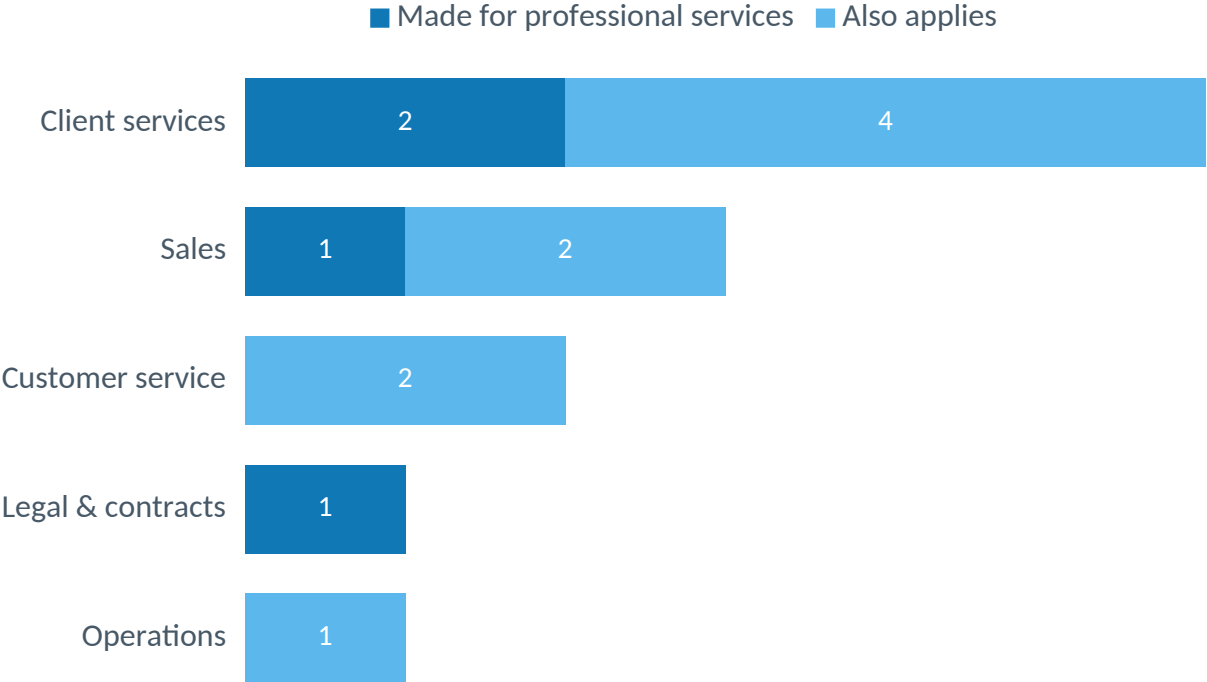
Your data stays protected

Sensitive fields are protected before any model sees them, and every action is on the record.



13 use cases for professional services

Use cases by department



4

made for professional services

7

high value at low or medium effort

2

ready to run or start from a template

Every use case is on a card in the appendix.



Where we'd start

1

CLIENT SERVICES

Unbilled time & billing review

Time entries checked against the engagement, unbilled work found, invoices drafted.

Consolidate → Validate → Draft

Value high · effort medium · Guide

2

CLIENT SERVICES

Client question answers

Clients' routine questions answered from their file and your guidance, for a quick review.

Answer → Draft

Value medium · effort medium · Guide

3

SALES

Proposal drafting

First drafts of proposals and statements of work from the brief and past winning proposals.

Research → Draft

Value medium · effort medium · Guide



The work AI takes on



7

Draft

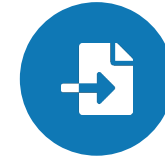
Writes the first version for a person to edit



7

Follow up

Chases people until the gap is closed



6

Intake & extract

Reads emails, PDFs and forms



4

Consolidate

Pulls sources together and matches them



4

Validate

Checks documents and data against your rules



2

Answer

Answers questions from your own material



Your sensitive data stays protected

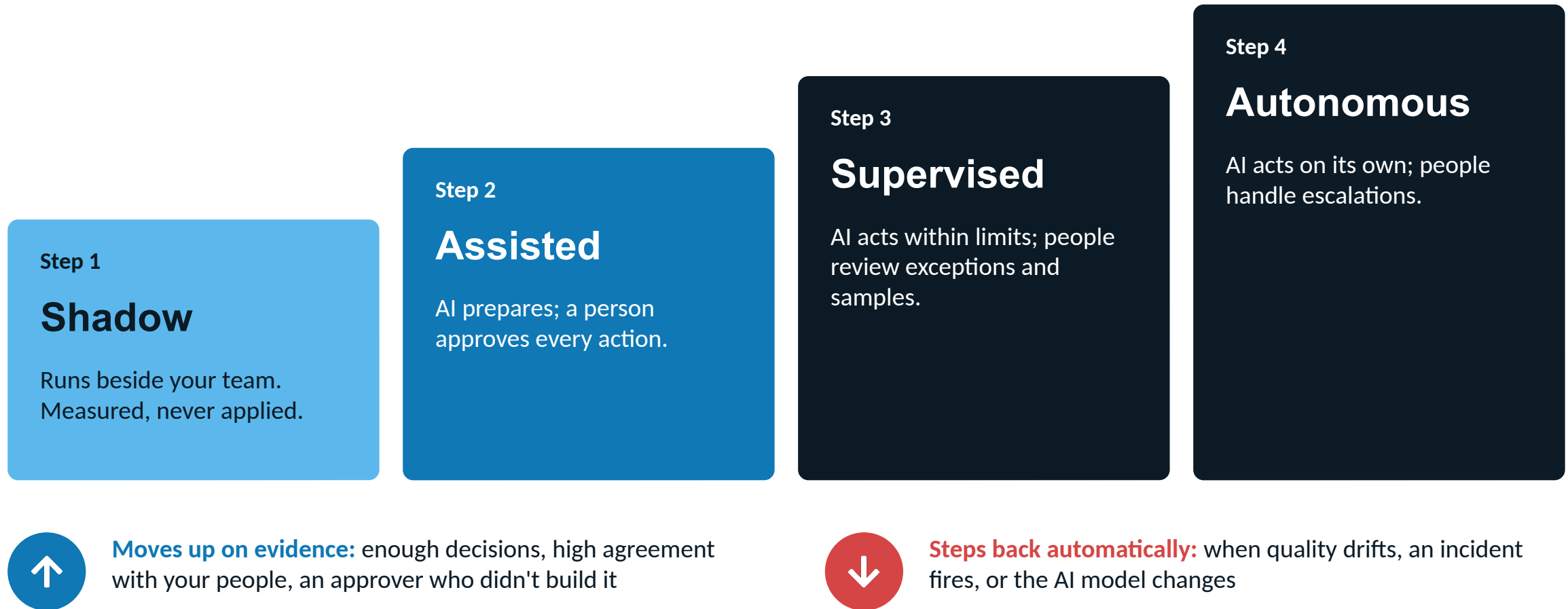
Sensitive data these use cases touch



Rules they fall under



Your team approves until the AI has earned more



Works with the systems you already use



Email

9 use cases



Shared files

9 use cases



Service desk

3 use cases



Accounting system

2 use cases



CRM

2 use cases



**Customer support
desk**

2 use cases



Chat & messaging

1 use case



**Practice
management / EHR**

1 use case



How to get started



01

Try the free workflows

Run sample processes free, including one on protected sample data



02

Pick your first use case

We'd suggest Unbilled time & billing review, or the pain that costs you most



03

Run it beside your team

Nothing is applied until your people agree with its work



04

Add the next one

The second use case is faster: connections and approvals already exist

Use cases made for professional services

CLIENT SERVICES

Low risk

Unbilled time & billing review

Time entries checked against the engagement, unbilled work found, invoices drafted.

[Consolidate](#) → [Validate](#) → [Draft](#)

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CLIENT SERVICES

Medium risk

Client question answers

Clients' routine questions answered from their file and your guidance, for a quick review.

[Answer](#) → [Draft](#)

Value medium · effort medium · Guide

SALES

Medium risk

Proposal drafting

First drafts of proposals and statements of work from the brief and past winning proposals.

[Research](#) → [Draft](#)

Value medium · effort medium · Guide

LEGAL & CONTRACTS

High risk

Matter & deadline monitoring

Court, filing and client deadlines tracked; owners reminded in time.

[Monitor & alert](#) → [Follow up](#)

Value medium · effort medium · Guide



Also applies, from other industries (1 of 2)

CLIENT SERVICES

High risk

Client document collection

Statements, receipts and forms requested from clients, checked when they arrive, chased when they don't.

Follow up → Intake & extract → Validate

Value high · effort medium · Template ready

CLIENT SERVICES

Medium risk

Implementation & integration projects

Each client implementation's plan, open items and blockers pulled from tickets, mail and meetings; slipping milestones flagged and owners chased.

Consolidate → Monitor & alert → Follow up

Value high · effort medium · Guide

CLIENT SERVICES

Medium risk

Client onboarding & engagement

New clients onboarded: engagement letter, ID and documents collected and checked.

Intake & extract → Validate → Draft → Follow up

Value medium · effort medium · Template ready

CLIENT SERVICES

Medium risk

Monthly SLA & service reports

Uptime, ticket volumes, SLA results and transaction numbers rolled into each client's monthly report, with what changed and why.

Consolidate → Analyse history → Draft

Value medium · effort low · Guide

SALES

Medium risk

Answer clients' security & due-diligence questionnaires

Banks' vendor questionnaires and security assessments answered from your policies, certifications and past answers, with each answer's source; new questions go to the right owner.

Intake & extract → Answer → Draft

Value high · effort low · Guide · Third-party risk guidance · ISO 27001 / SOC 2

SALES

Medium risk

Tender & RFP responses

Requirements in a tender extracted into a compliance matrix and answered from product sheets and past bids, in Spanish or English.

Intake & extract → Consolidate → Draft

Value high · effort medium · Guide



Also applies, from other industries (2 of 2)

CUSTOMER SERVICE

Medium risk

Client support tickets with SLAs

Client tickets classified by product, priority and SLA, routed to the right team, chased before the SLA breaks and escalated when they do.

Intake & extract → Route → Follow up

Value high · effort medium · Guide

CUSTOMER SERVICE

High risk

Appointment reminders & no-shows

Reminders, confirmations and rebooking for missed appointments.

Follow up → Converse

Value medium · effort low · Guide · HIPAA

OPERATIONS

Medium risk

Change orders

Change requests captured, priced, signed and billed, so extra work isn't done for free.

Intake & extract → Validate → Follow up

Value high · effort medium · Guide

