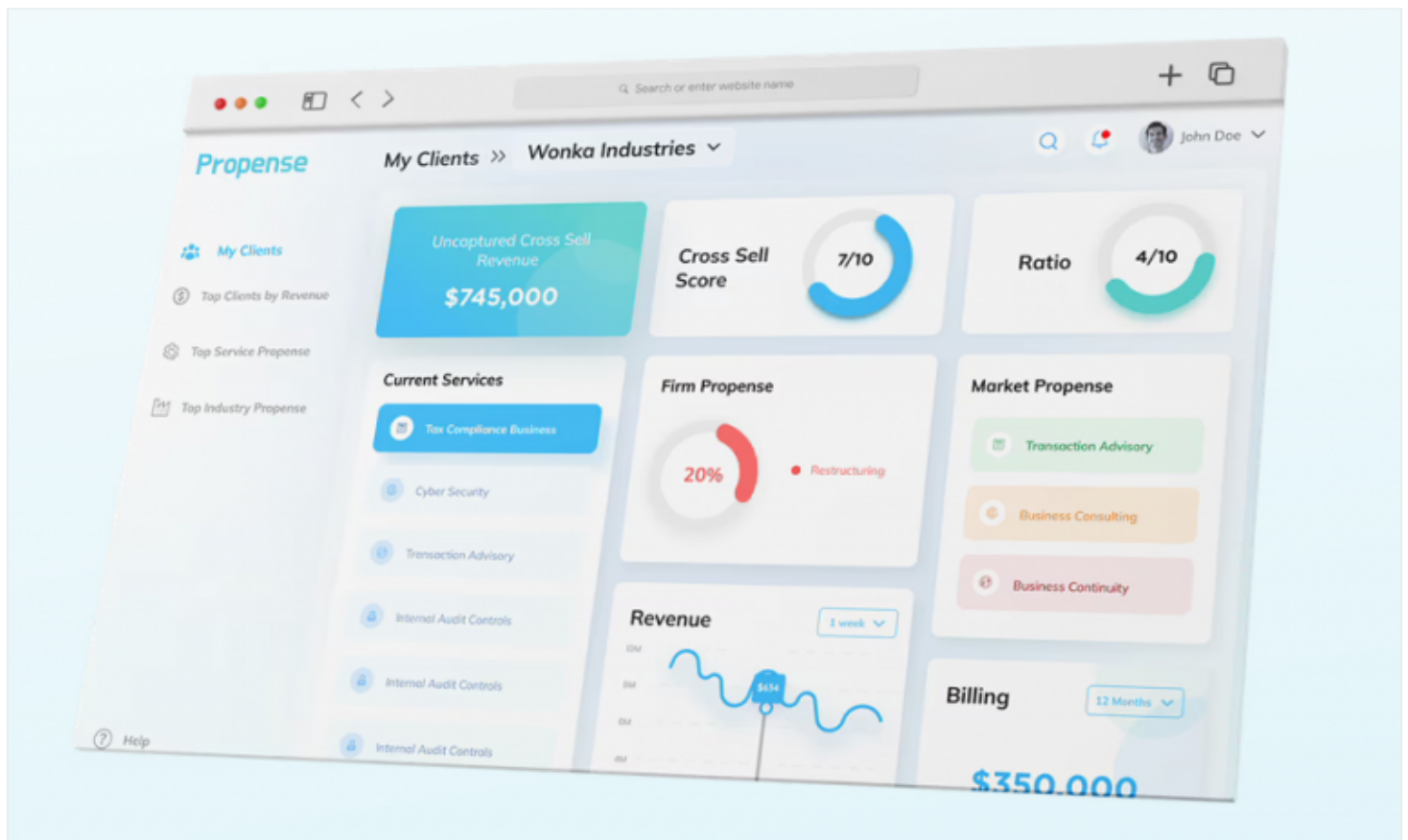


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accounting and legal professionals by providing them with highly probable cross-selling recommendations for existing customers.

Isaac M. O'Bannon • Mar. 06, 2024



Propense.ai, a SaaS platform using AI technology to improve client service and drive cross-selling revenue for professional services firms, has raised \$3 million in its first round of seed funding led by **Harlem Capital**. Participating investors include **Operator Collective**, **New Enterprise Associates (NEA Angel Fund)**, **Florida Opportunity Fund**, Glass Family Office, and angels.

Combining AI technology with data science, user psychology, human behavior, and industry insights, Propense.ai anticipates client needs and streamlines the sales

experience for accounting and legal professionals by providing them with highly

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plans to launch Propense.ai to the public in 2025, according to [Timothy Keith](#), CEO and Co-Founder of Propense.ai.

“The most successful professional services firms are actively engaged in adding service offerings to help their clients, but often struggle with educating their teams on when to offer new services,” Keith said. “Propense.ai solves this challenge, elevating client satisfaction while also driving revenue. We’re focused on building the best cross-selling product for the professional services market and generating as much revenue as possible for our clients, and support from our investors enables us to achieve that mission.”

“Behavior is one of the most difficult factors to change in the workplace, especially when sales professionals are expected to cross-sell services they don’t understand nearly as well as their core lines of business,” Keith continued. “That’s where Propense.ai and its revenue automation capabilities come into play. Using generative AI, accounting and legal professionals can propel new revenue by anticipating and supporting their clients’ needs ahead of time.”

Investors conducted thorough due diligence during the seed round, engaging with Propense.ai’s clients to understand the challenges affecting the professional services industry and how the platform addresses them.

Suzanne Reed, chief marketing officer at LBMC, the largest professional services solutions provider based in Tennessee, is one of nine clients in Propense.ai’s invite-only beta group.

“Several platforms offer client intelligence and scoring data, but they don’t predict additional revenue streams for our clients,” Reed said. “Accountants and lawyers aren’t salespeople by trade, but Propense.ai gives them tools to proactively recommend beneficial services to their clients with confidence. Propense.ai goes

beyond cross-selling by empowering accountants and lawyers to better understand

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business operations become more consolidated.

“Investors recognized that Propense.ai isn’t just a recommendation model,” Anyanwu said. “It’s a comprehensive cross-selling platform that prioritizes human behavior and psychology. Let’s examine the total number of sales attempts professionals make, for example, which is the leading indicator of success in generating new business. Providing recommendations backed by data encourages professionals to make more sales attempts because it helps them understand how and why their clients can benefit from additional services in the first place.”

“Propense.ai is serving as the conduit for professionals across all different verticals, from accounting to legal to financial services, so they can feel comfortable in making these suggestions,” Anyanwu continued. “Integrating AI to automate these processes strengthens their confidence in the process.”

Propense.ai is now moving into production from its invite-only beta with a select group of clients, including [Bennett Thrasher](#), [CBIZ](#), [HoganTaylor](#), [LBMC](#), [Maudlin Jenkins](#), [Plante Moran](#), and [Rehmann](#). The company is currently invite-only and will onboard its next group of clients later this year before going public in 2025.

“We thank our clients for allowing us to build this platform and collaborating with us every step of the way,” Keith said. “It’s often perceived that technology leads processes, but in reality, people lead processes. Taking that perspective has enabled us to develop a human-centered solution that prioritizes people and the way they work. We’re committed to making B2B professionals feel comfortable and supported as they embrace new sales processes that yield fruitful results for them, their firms, and their clients.”

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