Agentic AI · E-book

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Every year, a 100-person firm gets back

6,600.

hours. That is 4.1 FTE.

How Agentic AI Insights and Actions change reporting, planning and invoicing in professional services.

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Estimate for a 100-person professional services firm

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Introduction

Why we wrote this

Every professional services firm spends a surprising share of its week on work about the work: building reports, entering projects, dragging planning blocks around and checking invoices line by line.

Agentic AI changes that. Instead of opening a report tool or clicking through screens, people ask a question or give an instruction in plain language. The AI reads the data, proposes the change and carries it out after approval. This e-book estimates what that is worth for a typical firm of 100 people, process by process, and is open about every assumption behind the numbers.

The prerequisite: one platform, one connected data model

These savings are only possible when everything runs in one platform and the data is related: projects (financial and operational), work and task management, resource management, time and expenses, and invoicing. Only then can AI answer a question across budget, planning, hours and billing in one go, and act on it without exports, reconciliation or switching between tools. With separate tools for planning, time tracking, invoicing and BI, much of the saving disappears into integrations and spreadsheets.

1 · The short answer

About 6,600 hours a year, or 4.1 FTE

A 100-person professional services firm saves an estimated 6,600 hours per year with PSOhub Agentic AI. At a loaded cost of $75 per hour, that is about $500K.

Agentic AI Insights

3,034.

hours a year, by replacing manual reports in report tools, BI and Excel

Agentic AI Actions

3,600.

hours a year, by replacing click-heavy work in the classic UI

Capacity freed

4.1 FTE.

at 1,600 productive hours per FTE, about 66 hours per employee

Extra value

$150–250K.

per year from proactive recommendations, not counted in the hours

The two halves are close in size but different in nature. Insights mostly helps project managers, team leads, finance and management, who today spend hours each week assembling reports. Actions mostly helps planners, project managers and finance, who today spend hours clicking through screens to create, plan, replan and invoice.

The saved time is capacity, not cash. It turns into money when it goes to billable work, to growth without extra hires, or to less overtime and fewer evenings spent on admin.

2 · Insights vs. classic reporting

Ask a question instead of building a report

Classic reporting nearly always follows the same five steps. With a BI tool, add a request to the BI specialist and the wait that comes with it. With Agentic AI, the user asks the question and gets the answer back with context and recommendations.

Open report tool › Set filters › Export to Excel › Merge and clean › Write summary

"Which projects need attention, and why?" › **Answer + recommendations**

Across seven common reporting tasks this saves about **3,034 hours a year**. The single biggest item is the weekly project status report: ten project managers each spending three hours on it becomes thirty minutes of asking and reviewing.

Report	Classic: how it is done today	With Agentic AI Insights	Per year	Classic hrs	AI hrs
PM status reports	Open reports per project, export to Excel, compare budget to actuals, write up status	"How is my project doing?" and "Which of my projects need attention?"	460	3	0.5
Management and board reporting	Exports from several reports, update the Excel model, build charts and slides	"What happened this week?" and "Our ten largest projects at a glance"	12	24	4
Capacity and planning analysis	Capacity report plus Excel to find gaps and pre-sales holds	"What is the Capacity Report not seeing?"	138	4	1
Finance analysis	Combine WIP and receivables from separate lists	"Unbilled work by age" and "Who pays late?"	46	6	1
Team checks: hours and targets	Review timesheets per person, email reminders	"Did my team book their hours?"	368	1.5	0.25
Ad-hoc analysis and BI requests	Ask the BI specialist or controller, wait for a dataset	Ask directly in plain language	120	3	0.5
Client meeting prep	Search PSOhub and the CRM separately, merge notes	"Prepare me for my meeting with this client"	300	1	0.2

3 · Beyond hours

AI flags what nobody asked for

Classic reporting shows what you ask for. Agentic AI also points to what you did not ask, because it sees budget, planning, hours and invoices together.

That is where the connected data model pays off a second time. A report tool can show that a project is over budget; it cannot tell you that the overrun comes from one senior consultant booking on the wrong phase, that the same customer has an unpaid invoice, and that next month's planning is empty. Agentic AI can, because all of that lives in one place.

Spot overruns weeks earlier

Gaps between budget, plan and actuals surface as they happen, with the reason behind each deviation.

Catch unbilled work

Work ready to invoice, aging WIP and won deals without a project come up on their own.

Raise utilization

Gaps in the schedule and projects with hours but no planning become visible.

What it is worth

One point of extra utilization across 75 billable staff is 1,200 hours, or about $144K in revenue at $120 an hour. Add revenue leakage that no longer slips through, such as forgotten invoices and unbilled extra work, and a conservative estimate is $150K to $250K a year. This value is kept separate from the hours saved, so the time savings stand on their own.

4 · Actions vs. the classic UI

One instruction instead of hundreds of clicks

In the classic UI, a user navigates to the right screen, fills in fields one by one, switches to the planning board to check availability, and repeats that for every task, person or invoice. With AI Actions, the user describes the outcome. The AI prepares the change, shows a preview and executes it after approval.

> "Create a project for Acme from quote Q-2026-114, staff it with two senior consultants, and plan 16 hours a week for the next six weeks."

Across planning, replanning, invoicing, budgeting and setup this saves about **3,600 hours a year**. Invoicing is the biggest single item: 1,800 invoices a year at about twenty clicks each becomes one batch instruction per invoice run.

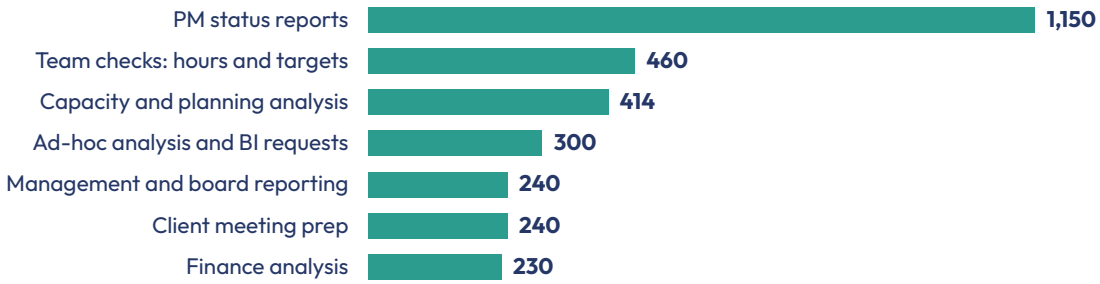
Process	Classic UI	With Agentic AI Actions	Per year	Classic hrs	AI hrs
Create and staff a project	~8 screens, ~60 clicks	1 instruction from the quote or deal	250	1.5	0.25
Plan tasks	~150 clicks for 30 tasks	1 instruction or a template	250	3	0.5
Resource planning (weekly)	~200 clicks a week on the planning board	Plan by role or skill with an availability check	138	6	2
Planning coordination by PMs	Emails and chats, then edits in the board	PM gives the instruction directly	460	1	0.25
Replan when someone is sick	~5 screens, ~40 clicks	1 instruction: find a replacement, move the planning	100	2.5	0.5
Replan when work shifts	~15 clicks per change	1 instruction	400	1	0.2
Create and check invoices	~20 clicks per invoice	Every ready-to-bill project in one batch	1,800	0.5	0.1
Build a budget	~50 clicks of budget lines	Built from the quote or a template	250	2	0.4
System setup, ongoing	Users, roles, templates, rates screen by screen	Bulk changes by instruction	1	60	15
System setup, one-time (year 1)	Admin screens for stages, roles, templates	Set up through conversation	1	120	40

5 · Adding it up

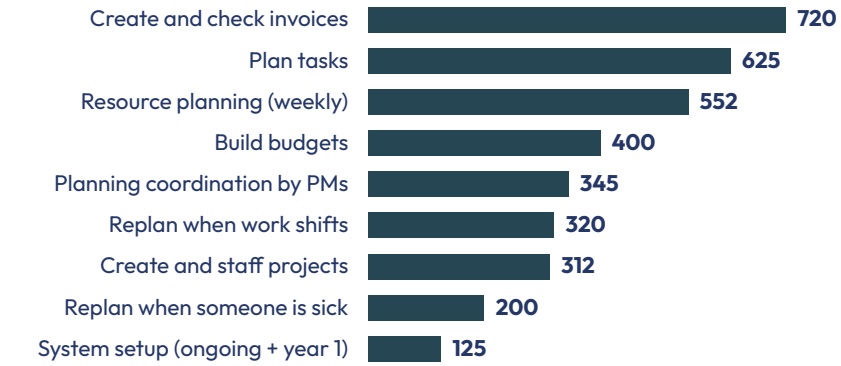
Where the 6,600 hours come from

Invoicing and project status reports are the two largest single savings; together they make up more than a quarter of the total. The rest is spread across many tasks that each take a little time, every week, for many people.

Agentic AI Insights vs. classic reporting: 3,034 hrs (46%)



Agentic AI Actions vs. the classic UI: 3,600 hrs (54%)



Hours saved per year = times per year × (classic hours − AI hours). Excluding the one-time setup in year 1, the recurring saving is about 6,550 hours a year.

6 · No interface to learn

The learning curve disappears

In a siloed landscape, every tool has its own screens, menus and logic. With Agentic AI in one platform, people describe what they need in their own words. There is no user interface to master first.

A typical professional services firm runs five or six separate tools: one for projects and tasks, one for planning, one for time tracking, one for invoicing, a BI tool or Excel for reporting, and a CRM. Every employee has to learn several of them, and every tool works differently. A consultant books hours in one place, logs expenses in another and checks a task list in a third. A project manager needs all of them, plus the report tool. A new hire needs weeks before they find their way.

With PSOhub Agentic AI that changes in three ways. First, the instruction is the interface: "book 6 hours on the Acme migration for yesterday", "create a project from this quote" or "show me which projects need attention" work the same way, whatever the task. Second, everything sits in one platform with one data model, so nobody has to remember which tool holds which number. Third, the AI shows a preview before it changes anything, so people act with confidence even on tasks they rarely do.

What this means for the user

- **Productive in days, not weeks.** New hires learn what to ask, not where to click in five tools. Onboarding drops from about 24 to 6 hours per person.
- **Occasional tasks stay easy.** Most people approve hours, create a project or run a report only now and then. They no longer have to look up how it works each time.
- **One place, one truth.** No switching between logins, no searching which tool has the latest figure, no double entry.
- **Less dependence on key users.** The "how do I…?" questions to power users and the admin largely go away.
- **Better data, better insights.** When booking hours or updating a task takes one sentence, it happens on time. That makes every report and recommendation more reliable.

6 · No interface to learn

What a lower learning curve saves

The lower learning curve adds about **1,900 hours a year** on top of the savings from Insights and Actions. The largest item is switching between tools: research published in Harvard Business Review found that employees toggle between apps and websites nearly 1,200 times a day and spend just under four hours a week reorienting themselves, about 9% of their working time. This model assumes only 3 minutes a day.

Source of saving	Assumption	Per year	Siloed hrs	AI hrs	Saved hrs
Onboarding new users	20 new users a year (hires and role changes), training and ramp-up in 5–6 tools	20	24	6	360
Finding how something works	10 minutes per person per week looking up features, asking colleagues; 75% less	4,600 wks	0.17	0.04	575
Key-user and admin support	2 key users, 3 hours a week answering "how do I" questions; half of it goes away	92 wks	3	1.5	138
Switching between tools	3 minutes per person per day re-finding information across tools; 60% less in one platform	22,000 days	0.05	0.02	660
Relearning after releases	2 hours per person a year adapting to changed screens in several tools	100	2	0.5	150
Total learning-curve saving					**1,883**

Impact on the total

Added to the 6,634 hours from Insights and Actions, the total rises to about **8,500 hours a year**: **5.3 FTE**, or about **$640K** at $75 an hour.



The headline figure of 6,600 hours in this e-book excludes the learning-curve saving, to keep it conservative. Part of the switching saving comes from one platform rather than from AI itself; both depend on the connected data model. Source: Murty, Dadlani and Das, "How Much Time and Energy Do We Waste Toggling Between Applications?", Harvard Business Review, August 2022.

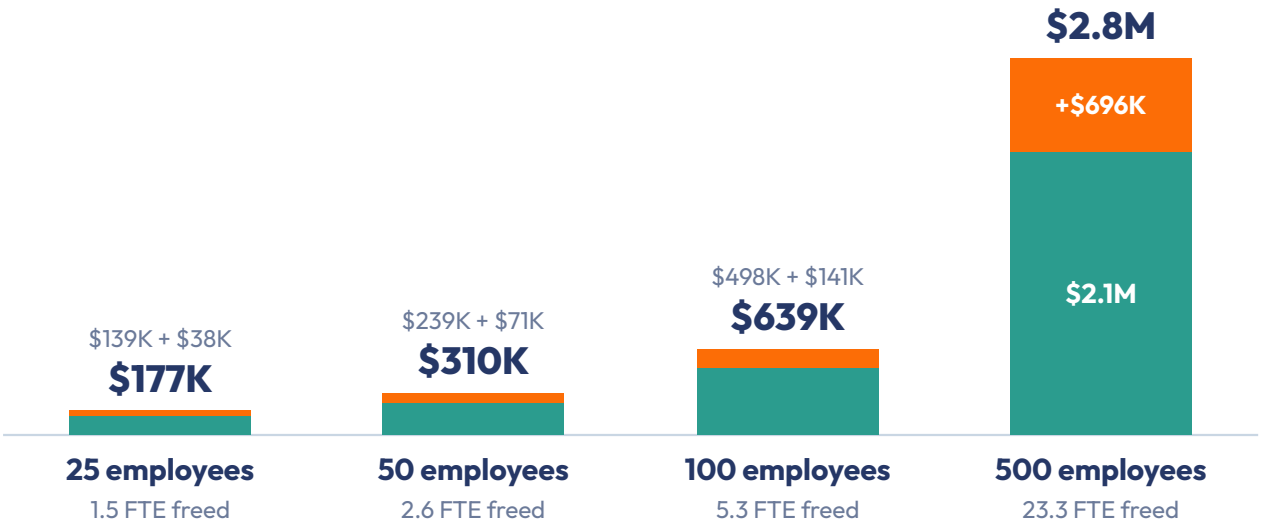
7 · From 25 to 500 people

How the savings scale

The savings grow with the size of the firm, but not in a straight line. Invoices, projects and hours grow with headcount; management reporting, finance analysis and setup largely do not. Small firms therefore save a little more per employee, and large firms save the most in total.

Total savings per year

For the whole firm, valued at a loaded internal cost of $75 per hour.



Savings per employee per year

The same savings divided by headcount. Smaller firms save slightly more per person because fixed work, such as management reporting and month-end, is spread over fewer people.



7 · From 25 to 500 people

The numbers by firm size

Firm size (employees)	25	50	100	500
Billable staff	20	39	75	390
PMs / planners / finance	3 / 1 / 1	5 / 1 / 2	10 / 3 / 5	45 / 12 / 18
New projects / invoices per year	60 / 450	125 / 900	250 / 1,800	1,000 / 8,000
Insights and Actions				
Insights (hours per year)	880	1,466	3,034	12,676
Actions (hours per year)	974	1,724	3,600	15,330
Hours saved per year	**1,854**	**3,190**	**6,634**	**28,006**
FTE freed	**1.2**	**2.0**	**4.1**	**17.5**
Internal cost at $75/hr	**$139K**	**$239K**	**$498K**	**$2,100K**
Hours per employee	74	64	66	56
Including the lower learning curve				
Learning-curve saving (hours)	505	942	1,883	9,277
Total hours saved per year	**2,359**	**4,132**	**8,516**	**37,283**
Total FTE freed	**1.5**	**2.6**	**5.3**	**23.3**
Total internal cost	**$177K**	**$310K**	**$639K**	**$2,796K**
Extra value, not counted above				
+1 point utilization ($120/hr)	$38K	$75K	$144K	$749K

Roles and volumes per size are typical figures scaled from the 100-person model; small firms often combine roles, such as a project manager who also plans. Hours per task are the same at every size.

The firm behind the numbers

Attribute	Assumption
Employees	100, of whom 75 are billable
Project managers / resource planners	10 / 3
Finance and admin / people managers	5 / 8
New projects per year	250
Invoices per year	1,800 (150 per month)
Sick-leave episodes affecting the schedule	100 per year
Working weeks / productive hours per FTE	46 / 1,600 per year
Internal cost / billable rate	$75 / $120 per hour

Read the numbers with care

- **Estimates, not measurements.** Volumes, hours and click counts are typical figures for a firm of this size. Replace them with your own for a firm-specific business case.
- **Review time is included.** AI hours cover writing the prompt, checking the preview and confirming.
- **Data quality matters.** Insights are only as good as the hours, planning and budgets behind them.
- **Conservative scope.** Hour entry, approvals, expenses, leave and quotes are supported by AI Actions but not counted here.

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A 100-person PSO gets back 6,600 hours a year

What PSOhub Agentic AI Insights and Actions save compared with classic reporting in report tools, BI and Excel, and with clicking through the classic UI.

The prerequisite: one platform, one connected data model

These savings only happen when projects (financial and operational), work and task management, resource management, time and expenses, and invoicing live in one platform with related data. Then AI can read and act across all of it, with no exports, reconciliation or tool switching.

6,600.
Hours saved per year
About 66 hours for every employee.

4.1.
FTE of capacity freed
Growth without extra hires.

$500K.
Internal cost per year
At a loaded cost of $75 per hour.

+$150–250K.
Extra value per year
From proactive recommendations.

Agentic AI Insights

Ask a question instead of building a report

3,030 hours saved per year

Classic reporting: 5 steps, 3 hours per status report

Open report tool › Set filters › Export to Excel › Merge and clean › Write summary

With Agentic AI: 1 question, 30 minutes

"Which projects need attention, and why?" ›

Answer + recommendations

Hours saved per year



Agentic AI Actions

One instruction instead of hundreds of clicks

3,600 hours saved per year

Task	Classic UI	Agentic AI
Create and staff a project	8 screens, ~60 clicks	**1 instruction**
Plan 30 tasks	~150 clicks	**1 instruction**
Replan when someone is sick	5 screens, ~40 clicks	**1 instruction**
Weekly resource planning	~200 clicks	**A few instructions**
150 invoices a month	~3,000 clicks	**1 batch**

Hours saved per year



Beyond hours: AI flags what nobody asked for

Spot overruns weeks earlier

Budget, plan and actuals are compared continuously, with the reason behind each deviation.

Catch unbilled work

Work ready to invoice, aging WIP and won deals without a project surface on their own.

Raise utilization

One extra point across 75 billable staff is 1,200 hours, about $144K in revenue.

Estimate for a typical PSO: 100 employees (75 billable), 10 PMs, 3 planners, 250 new projects and 1,800 invoices a year, 1,600 productive hours per FTE, $75/hr internal cost, $120/hr billable rate. AI hours include writing the prompt, reviewing the preview and confirming. Hour entry, approvals, expenses, leave and quotes are not counted. Source: PSOhub Help Center, Agentic AI.

Next step

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See what your firm gets back

We will run this model with your own volumes and show Agentic AI Insights and Actions on your data, in one platform for projects, resource management, time and expenses, and invoicing.

Book a first meeting

psohub.com · Agentic AI documentation: help.psohub.com/agentic-ai