



CBINSIGHTS



Deloitte.



KPMG



accenture



EY



BCG



BAIN
& COMPANY



McKinsey
& Company



pwc

THE FUTURE OF Professional Services

How firms will capture value in the AI agent era

Using CB Insights predictive intelligence and insights from senior AI and data executives at top professional services firms, we developed a roadmap for staying competitive in an AI-first world.

Four priorities emerge: orchestrating the AI agent tech stack, activating proprietary data for smarter agents, turning services into scalable AI products, and leading the buildout of a human-AI workforce.

Enterprise demand for AI is surging as intelligent agents transform how work gets done. In 2024 alone, private [AI agent solutions](#) and their [underlying intelligence layer \(LLMs\)](#) generated over \$10B in revenue, a number we expect will more than double this year.

For professional services firms, this momentum poses an existential question: What happens to the traditional consulting model when clients have direct access to AI-powered expertise?

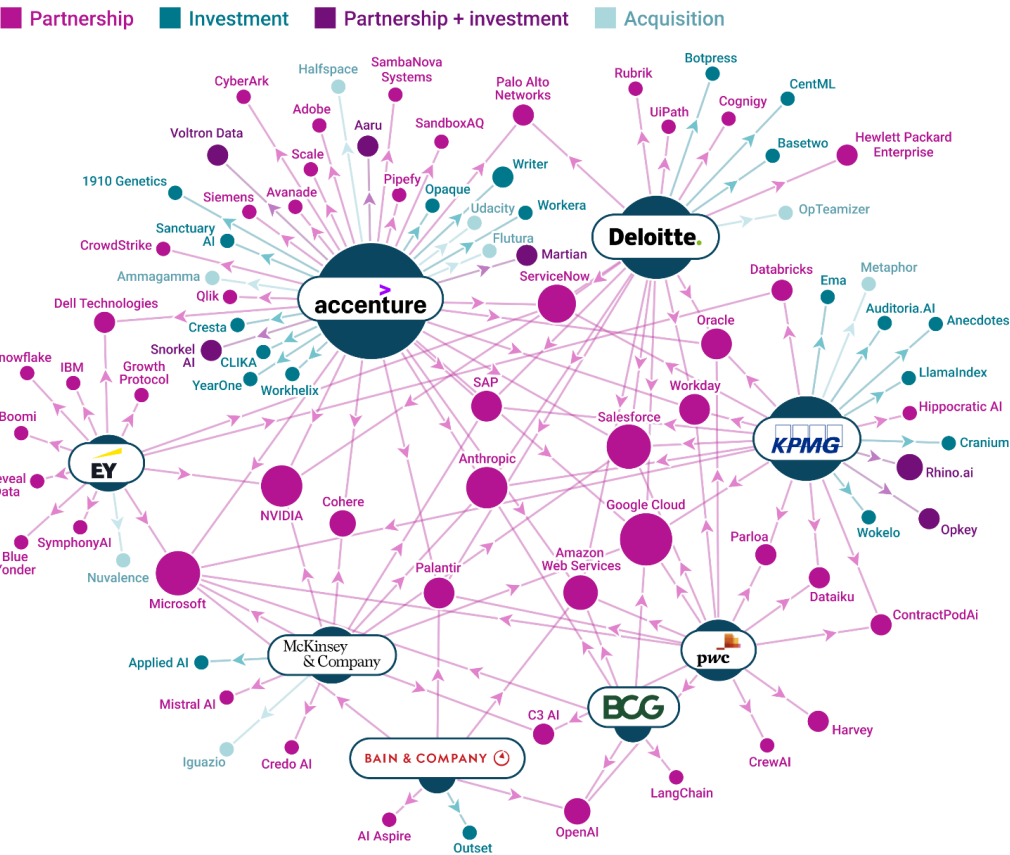
The industry is already pivoting. [McKinsey](#) has deployed around 12,000 AI agents internally to support consultants and enable leaner project teams. Meanwhile, [Accenture](#) announced in June that it would merge five units into a new “reinvention services” business line aimed at helping clients overhaul their operations with AI.

Across the sector, leading strategy and tech consulting firms have collectively pursued more than 100 AI agent-related partnerships, investments, and acquisitions since 2023, per CB Insights data.

Note: Graphic features publicly disclosed or otherwise confirmed relationships announced since 1/1/2023, focusing on AI agents & related infrastructure. It is not intended to be exhaustive.

How professional services firms are building their AI agent strategies

AI investments, acquisitions, and partnerships since 2023 CBINSIGHTS



Key insights across firms' activity

Race to own the stack

Developing comprehensive AI agent platforms via partnerships

Embedding agents

Salesforce, ServiceNow, Workday, SAP partnerships show firms "riding the rails" of enterprise adoption

Data as differentiator

Via acquisitions, KPMG and McKinsey are building data infrastructure that's ready for AI agents

Workforce transformation

Accenture and KPMG lead investment activity in startups automating consulting & enterprise workflows

Between leading professional services firms and AI companies, enterprise software vendors, and cloud providers, with a focus on AI agents & enabling infrastructure. Not exhaustive of relationships over the time period. Data as of 8/26/2025. © 2025 CB Insights. Source: CB Insights Business Graph. CBINSIGHTS

The stakes are clear: with momentum building but enterprise pilots often stalling, the firms that move **beyond advice to building and orchestrating** will shape the future of the AI economy.

Drawing on CB Insights predictive intelligence and interviews with senior AI and data executives, this report offers a forward-looking roadmap for how professional services firms can capture value over the next two years and beyond. Our analysis points to four key strategic opportunities:

1. **Orchestrate the AI agent tech stack:** Guide clients through implementation, integration, scaling, and governance of AI agents across fragmented infrastructure, from model selection to trust and performance management.
2. **Activate proprietary data for intelligent agents:** Turn firm and client data into fuel for more capable, context-aware agents — differentiating through domain-specific IP, data infrastructure, and strategic partnerships.
3. **Turn services into scalable AI products:** Evolve from custom consulting engagements to platform-based delivery, industry-specific solutions, and new pricing models.
4. **Build the human-AI workforce:** Redesign internal talent models to work alongside AI agents while shaping offerings to help enterprises adopt and manage AI, from agents to robots.

Discover below what leading firms are building, where startup innovation is pointing, and promising partnership and acquisition targets — based on [CB Insights predictive intelligence](#) on the world's companies and markets.

How we built this report:

Over the last 9 months, we conducted in-depth interviews with senior leaders at leading professional services firms to understand the impact of AI agents on the future of the industry. To map out where the landscape is headed, we used CB Insights' [Market Intelligence Agents](#) to interpret signals across CB Insights data, including the following datasets and primary research:

- Industry partnerships, deal activity, earnings transcripts, and proprietary scores for company momentum
- Surveys with enterprise leaders and briefings with AI agent startups

Get full access with your free CBI trial

Note: Named firms did not review the data contained in this report.

Table of Contents

<u>Orchestrate the AI agent tech stack</u>	6
<u>Core consulting workflows see AI agent disruption</u>	6
<u>Firms are already leaning in to build the stack</u>	8
<u>An AI ecosystem model is emerging</u>	10
<u>Private market momentum points to key orchestration opportunities</u>	12
<u>Agent reliability failures drive demand for governance layer</u>	13
<hr/>	
<u>Activate proprietary data for intelligent agents</u>	16
<u>Leading firms build out the data layer for agentic AI</u>	16
<u>Firms create data moats around core practice areas</u>	20
<hr/>	
<u>Turn services into scalable AI products</u>	22
<u>Platform strategies replace project-based delivery</u>	22
<u>Strategic startup investments reinvent the consultant's toolkit</u>	24
<u>Shifting service delivery drives pricing model experimentation</u>	26
<hr/>	
<u>Build the human-AI workforce</u>	28
<u>Professional services firms face a workforce restructuring</u>	28
<u>AI-native startups preview the future efficiency of enterprise workforces</u>	31
<u>Managing AI becomes a new competitive moat</u>	32

CB Insights' definition of AI agents:

An AI agent is an LLM-based system designed to independently perform tasks on a user's behalf by reasoning, planning, leveraging memory, and interacting with external tools and other agents. Most agents today operate within constrained environments (i.e. with "guardrails") to complete specific objectives while retaining some decision-making control. Beyond 2025, we predict that agents will operate fully autonomously, with more sophisticated decision-making, adaptability, and task execution.

Put our market intelligence agents to work today. [Learn more](#)

Scope of professional services:

This report focuses primarily on strategy and technology consulting firms (including the Big Four). While the industry extends to legal, engineering, and specialized advisory services, our analysis centers on firms that directly compete with or complement AI agent capabilities in enterprise transformation and technology implementation.



Orchestrate the AI agent tech stack

While AI agent startups proliferate, enterprises struggle to move beyond pilots given integration complexity, security concerns, and vendor sprawl. Professional services firms are stepping in as orchestrators, bridging the gap between AI innovation and enterprise implementation.

“

Professional services, like every industry, is being reshaped in the agentic era, where intelligent systems act autonomously, adapt rapidly and collaborate with humans to drive outcomes. **At EY, we’re living this shift as client zero, deploying agents across the EY.ai platform to transform how we work and how clients operate.** The next frontier goes beyond automation to scaling trusted systems that turn reliable data into real value. That demands a new model, fusing human insight, platform thinking and responsible AI. The future will bring both change and opportunity. **That’s where professional services shine: standing in the middle of change, ensuring progress is matched with trust and human impact, and shaping the future with confidence.**

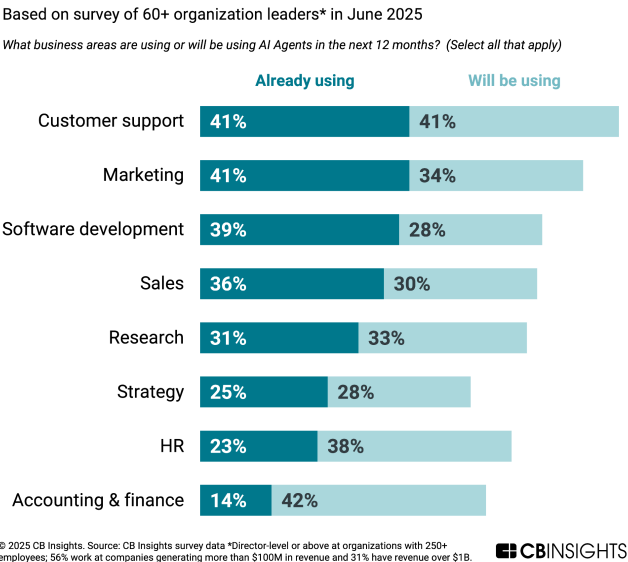


Hanne Jesca Bax
EY Global Vice Chair - Clients & Industries

Core consulting workflows see AI agent disruption

AI agents are rapidly tackling professional services firms’ bread-and-butter workflows. According to CB Insights survey data, enterprises are already deploying or planning to deploy agents across departments, with customer support, marketing, and software development leading adoption.

The AI agent takeover by department


















This enterprise demand is fueling a crowded and well-funded startup ecosystem. Companies targeting [software development](#), [general enterprise workflows](#), [legal work](#), and [customer service transformation](#) have among the most funding momentum and market players.

Looking ahead, CB Insights Mosaic startup health and potential scores show the highest momentum across the [security operations center \(SOC\) AI agents & copilots](#) market. This reflects how AI directly addresses SOC's biggest pain points: too many alerts and not enough analysts.


Mosaic score

Evaluates the overall health and growth potential of private companies based on performance, financial stability, market conditions, and management strength. It combines these factors into a single score (out of 1,000).

Leading markets within enterprise AI agents & copilots

By average Mosaic score			
AI agent & copilot market	Mosaic Avg (out of 1,000)	Company count	Top companies by Mosaic score
Security operations center (SOC)	704	38	 tines 
Marketing	701	12	 Typeface 
Legal	694	51	Harvey 
Customer service	690	41	 DevRev 
Accounting	657	13	 FloQast 
Enterprise workflow	642	66	 glean 
Coding	625	74	 augment code 
Recruiting	578	38	Ashby 
Sales	563	41	 clay 

© 2025 CB Insights. Data as of 9/23/2025. Private companies only with Mosaic scores.



 Dive into 1,500+ markets

Professional services firms face both disruption and opportunity. While startups are building point solutions for specific workflows, enterprises still struggle with implementation. Two-thirds of organizations surveyed by CB Insights say deploying agents is a priority, yet **nearly half remain stuck in the evaluation phase**. Integration complexity, vendor sprawl, and governance concerns are holding back real progress.

Blockers to AI agent implementation

Based on survey of 60+ organization leaders* in June 2025
What challenges are you facing or have you faced with implementing AI agents? (Select all that apply)



© 2025 CB Insights. Source: CB Insights survey data *Director-level or above at organizations with 250+ employees; 56% work at companies generating more than \$100M in revenue and 31% have revenue over \$1B. CBINSIGHTS

This gap represents professional services firms’ strategic opening. Their edge lies in what tech vendors lack: deep vertical expertise, trusted change management playbooks, and the ability to orchestrate fragmented tools into production-ready solutions.

As the agent ecosystem matures, professional services firms should position themselves at both ends of the AI agent value chain: **architecting what agents should do** (prompting and orchestration) and **verifying what's been done** (governance and quality assurance).

Firms are already leaning in to build the stack

Leading professional services firms are launching AI agent development and orchestration platforms, designed to both enable their own workforces as well as serve as flexible client solutions.

- [Accenture](#)’s AI Refinery platform enables users to build agents through no-code environments (Agent Builder), deploy multi-agent systems with 13+ partners (Trusted Agent Huddle), orchestrate agents enterprise-wide (Distiller SDKs), and access pre-built industry solutions to embed agent teams into business processes.
- [Deloitte](#)’s Zora AI platform offers a suite of agents for business functions such as finance.
- [EY](#) launched the EY.ai Agentic Platform created with [Nvidia](#) AI to deploy enterprise-ready AI agents across tax, risk, and finance domains.
- [KPMG](#) developed with [Microsoft](#) KPMG Workbench, a multi-agent AI platform that provides KPMG professionals with access to agents to improve client service delivery.
- [PwC](#)’s agent OS orchestration framework connects agents across major enterprise platforms to enable AI workflows.

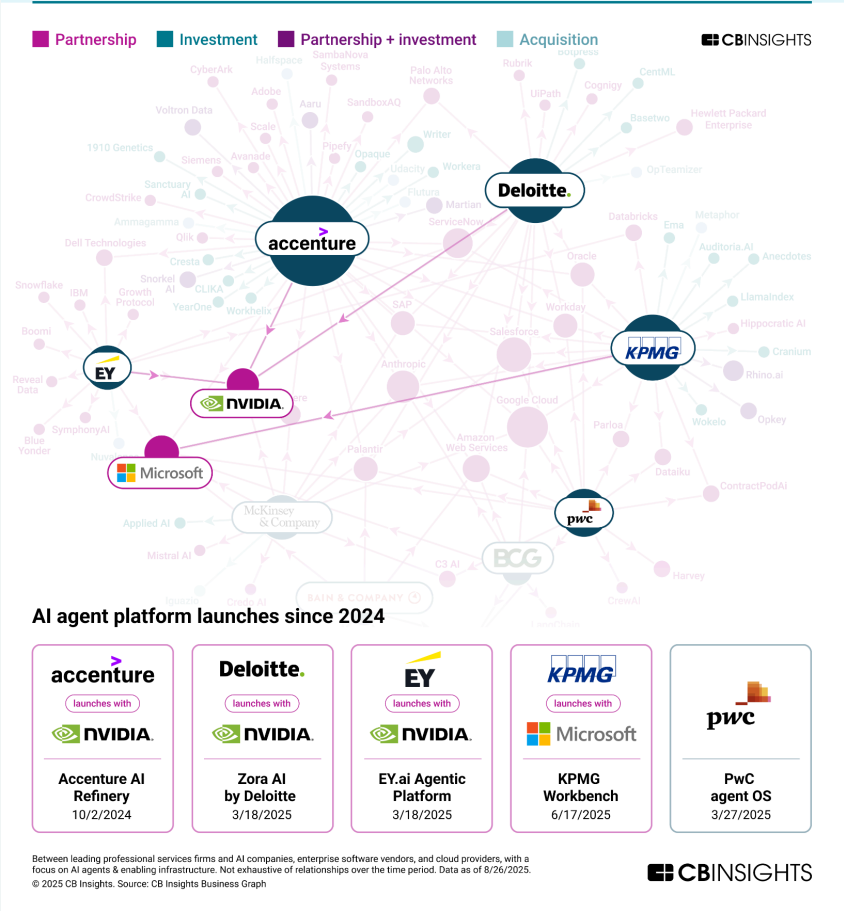
“

We asked ourselves here at Accenture, how can we make our marketing programs faster and better using the power of agentic AI? By integrating AI Refinery autonomous agents in our team’s workflow, every marketer is empowered to get better answers because our agents are set up to deliver detailed insights using proprietary data, helping to create more effective marketing initiatives. **This is why AI agents are the next frontier, they’re not a point solution, they’re integrated across every step of your process.** From marketing campaigns to the entire enterprise, Accenture is working toward a smarter, more agile future with generative AI and agentic architecture.



Jill Kramer
Accenture – CMC0

Firms race to own the agent development & orchestration layer



Firms are leaning in here because **orchestration is a differentiator**. They are positioned to design agent platforms that bridge fragmented AI infrastructure with proprietary data, workflow knowledge, and domain expertise.

“

With the proliferation of AI agents across the enterprise, trust is the only limit to AI reaching its full potential, and seamless and secure multi-system collaboration between agents will further the impact and promise of what agentic AI can achieve. With the launch of Trusted Agent Huddle, companies will be able to connect and orchestrate agents from different enterprise platforms within AI Refinery, enabling cross-platform capabilities and new forms of innovation.

**Lan Guan**

Accenture – Chief AI Officer

An AI ecosystem model is emerging

Expect strategic partnerships to increasingly shift from 1:1 alliances to many-to-many ecosystem relationships.

CB Insights business relationship data shows that firms are building **interoperable stacks** designed for composability, reflecting enterprises' need for flexibility as they experiment across models, platforms, and agents.

- **Big tech:** Most firms are working with Microsoft, [Google Cloud](#), [AWS](#), and Nvidia to stay vendor-agnostic. Google Cloud has the most connections.
- **Enterprise software vendors:** Consulting firms are “riding the rails” of existing enterprise software adoption, partnering with firms such as [Salesforce](#) (the leader in terms of number of partnerships), [ServiceNow](#), [Workday](#), [SAP](#), and others to embed agents where client data lives.

- **LLM developers:** Firms are establishing strategic partnerships with multiple LLM developers to provide diverse AI capabilities. Notable partnerships include:
 - [OpenAI](#): [Bain](#) (services alliance), PwC (global reseller)
 - [Anthropic](#): [BCG](#) (strategic collaboration), Accenture (via AWS partnership), and implementation partnerships across multiple firms such as Deloitte, PwC, KPMG
 - [Cohere](#): McKinsey and Accenture (enterprise partnership)
- **AI/ML platforms:** Firms are investing in or partnering across a variety of unique emerging AI/ML platforms to shape the architecture clients will increasingly rely on. Accenture has been most active, with 3 notable combined investments & partnerships at this layer: model routing startup [Martian](#), accelerated data processing platform [Voltron Data](#), and multi-agent data simulation software [Aaru](#). [C3 AI](#) notably has partnerships with both PwC and McKinsey to build industry-specific agentic solutions.

Get an instant X-ray of known customer, vendor, and partner relationships to reveal a company's strategy with our Business Relationship Analyst agent.

[Learn More](#)

This ecosystem strategy reflects the [fragmented nature of the AI infrastructure landscape](#). Enterprises building, deploying, and managing AI agents must integrate multiple tools and frameworks, alongside the underlying models and their data, to create production-ready AI agents.

“

In professional services, the value of AI won't come from how many agents you deploy – it will come from how well they're orchestrated. At KPMG, we're not just transforming how we work; we're reimagining how we deliver value to our clients. We built Workbench as our global architecture to standardize how agents are built, deployed, and monitored. And our Agent Control System governs the full lifecycle, ensuring accountability and preventing sprawl. By owning the orchestration layer and embedding agents into workforce strategy, we make sure every agent operates with the full context of enterprise data and knowledge.



Steve Chase

U.S. Vice Chair and Global Head of AI and Digital Innovation, KPMG

Private market momentum points to key orchestration opportunities

As professional services firms build out their ecosystem partnerships, private market signals reveal the infrastructure categories generating the most momentum — and where firms should prioritize their tech stack investments.

Using CB Insights Mosaic scores, which gauge overall company potential, some of the highest momentum companies in the AI agent ecosystem are focused on **enabling better context** for agents such as through data preparation and memory applications:

- **Data preparation (median Mosaic: 884):** Platforms that transform unstructured documents into structured, machine-readable formats optimized for LLMs. Enterprise data will become a key differentiator as agents need real-time, contextual information — while also creating new regulatory compliance needs as agents access business data.
- **Memory (median Mosaic: 689):** Developer frameworks that help AI agents maintain context and information across multiple interactions or tasks. Long-term memory systems will enable agents to build relationships and learn user preferences over time.

These companies are creating the scaffolding for more powerful agents that professional services firms will need to orchestrate effectively.

Context

CBINSIGHTS

Vector databases



LLM data preparation platforms



Memory management



Review the full [AI agent tech stack here](#) and [AI agent market map here](#).

Other infrastructure categories to watch based on Mosaic scores are giving agents more utility across payments and voice:

- **Payments (median Mosaic: 699):** Developer toolkits that enable agents to make transactions and maintain wallets & virtual cards — key for providing agents more utility. New fraud detection systems will emerge designed for AI agent behavior patterns, while cross-platform agent payment rails will create new financial infrastructure opportunities.
- **Voice (median Mosaic: 698):** Development platforms, speech models, and tools for building and testing AI voice applications. For customer interactions, voice conversations offer a far more expressive mode of communication than text-based channels. Rapid development at the model layer is jumpstarting applications here. See [voice AI market leaders here](#).

Agent frameworks & development platforms

CBINSIGHTS

Developer frameworks & platforms

ADEPT /dev/agents > LangChain
 blaxel vellum contextual.ai
 portia webAI Sema4.ai
 WRITER

Low-code platforms

kore.ai Adopt StackAI lyzr Lindy
 twin Mindset AI DeepOpinion capably Distyl
 H aixplain

Payments infrastructure

stripe kira catena
 nevermined nekuda crossmint
 payman Skyfire

Voice

Hamming hume Bland® LiveKit Synthflow
 VAPI Cartesia Voiceflow sarvam.ai FIXIE
 Retell AI RESEMBLE.AI ElevenLabs

Track 350+ AI agent startups

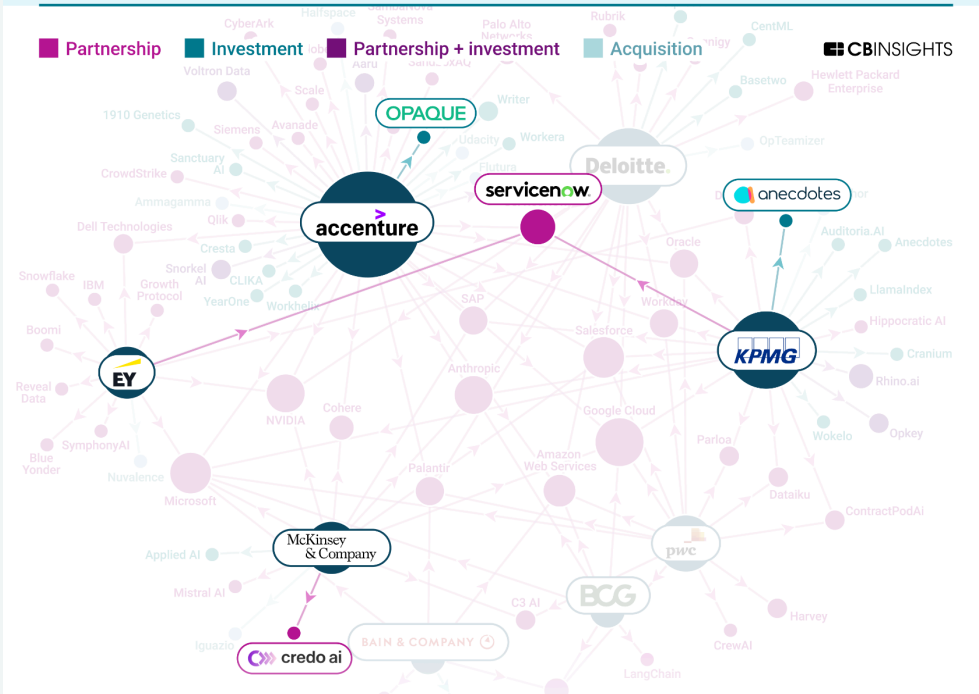
Agent reliability failures drive demand for governance layer

AI agent reliability [remains a major challenge in the landscape](#). Agents that fail, hallucinate, or behave unpredictably create immediate business risk.

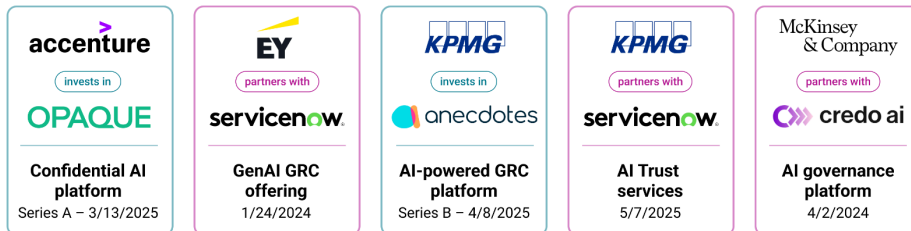
Vendors are taking multiple approaches to [improve the reliability of their agents directly](#). Meanwhile, the [AI agent observability, evaluation, & governance market](#) is on pace for record deal activity this year and has already seen 2 acquisitions in 2025 YTD.

Ultimately, reliability failures generate governance needs. Recent partnerships & investments show leading firms building oversight capabilities to manage agent risk.

Firms target building trust in AI agents



Governance-related investments and partnerships since 2023



Between leading professional services firms and AI companies, enterprise software vendors, and cloud providers, with a focus on AI agents & enabling infrastructure. Not exhaustive of relationships over the time period. Data as of 8/26/2025.
© 2025 CB Insights. Source: CB Insights Business Graph

CBINSIGHTS

Analyzing the [7 early-stage deals](#) (\$30.9M total funding) in the AI agent observability, evaluation, & governance market so far this year highlights emerging technical needs:

- **Voice agent testing:** [Cekura](#) (\$2.4M seed) and [Coval](#) (\$3.3M seed) both focus on voice AI testing and simulation, signaling that conversational agents require distinct observability approaches.
- **Synthetic user generation:** Multiple companies (Cekura, Coval, [Janus](#)) focus on synthetic user generation for agent testing.

- **AI productivity measurement:** [Larridin](#)’s \$17M seed round led by [Andreessen Horowitz](#) shows enterprise demand for quantifying AI agent ROI, with a focus on measuring human-AI workforce productivity.

2025 early-stage deals to AI agent observability companies

Companies	Latest round	Deal size	Deal date	Round investors
Cekura	Seed VC - II	\$2.4M	7/1/2025	Alan Rutledge, Allen Wu, Allport Capital
Traceloop	Seed VC	\$6.1M	5/27/2025	Grand Ventures, Ibex Investors, Samsung NE
Larridin	Seed VC	\$17.0M	4/2/2025	Andreessen Horowitz, Bloomberg
Janus	Convertible note	\$0.5M	4/1/2025	Y Combinator
LangWatch	Pre-Seed - II	\$1.1M	2/25/2025	Antler, Passion Capital, Volta Ventures
Coval	Seed VC - II	\$3.3M	1/23/2025	Fortitude Ventures, General Catalyst
Lucidic AI	Convertible note	\$0.5M	1/1/2025	Y Combinator

Source: CB Insights. Data as of 9/23/2025

 Dive into 1,500+ markets

Activate proprietary data for intelligent agents

The most powerful agents are those grounded in high-quality, proprietary data. Firms are racing to operationalize their internal knowledge and client insights to power differentiated, domain-specific solutions.

“

Professional services firms have observed backend processes across thousands of companies, whereas each individual company only sees its own processes. **This represents a significant advantage, as it enables us to offer valuable insights and data** that underpin our role in the value chain and facilitate transformation — truly driving adoption and effecting meaningful change.

Marc Verdonk

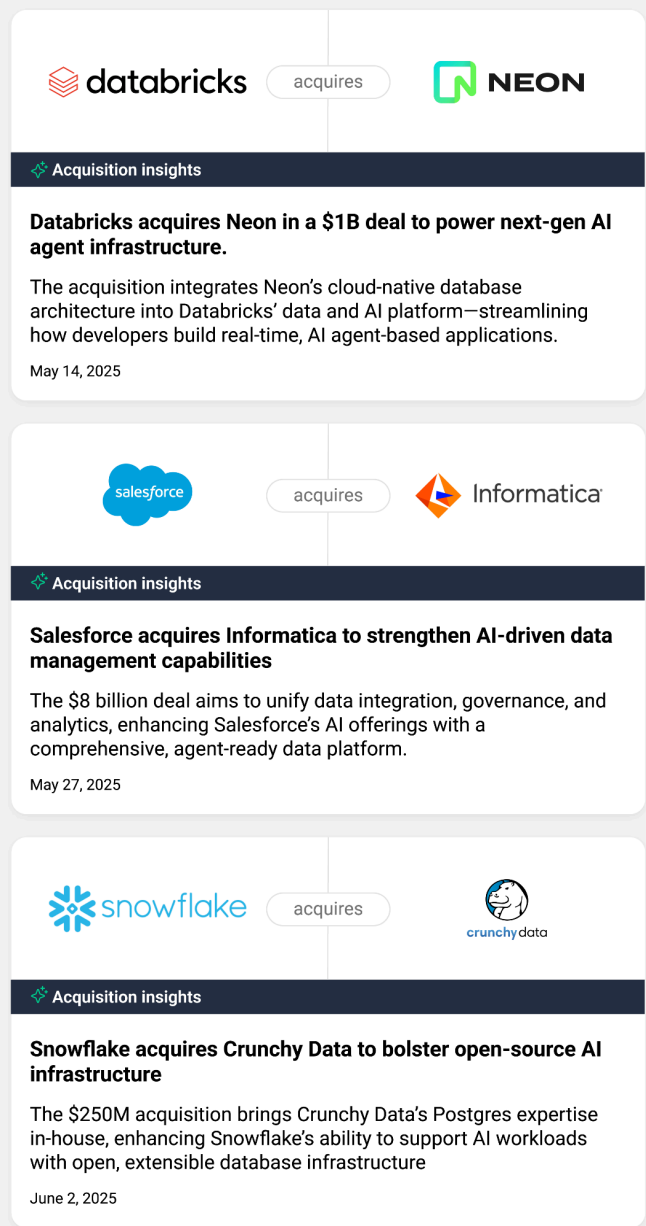
CTO – Strategy, Risk & Transactions Advisory (Deloitte)

Leading firms build out the data layer for agentic AI

The effectiveness of AI agents starts with data and context. A connected, well-structured data layer that links relevant information across

systems and encodes organizational knowledge can enable agents to go beyond simple task execution to automating complex, dynamic workflows.

Recent acquisitions by [Databricks](#), Salesforce, and [Snowflake](#) underscore the race to build better data infrastructure for AI agents.



Don't miss strategic targets – CB Insights Acquisition Hunter agent identifies promising early-stage disruptors and acquisition-ready assets.

[Learn More](#)

Professional services firms, which have access to troves of proprietary data to power agents, are making moves to build out their own data fabric layer according to CB Insights data.

EXECUTIVE DISCUSSION SPOTLIGHT

Professional services firms' data advantages & challenges

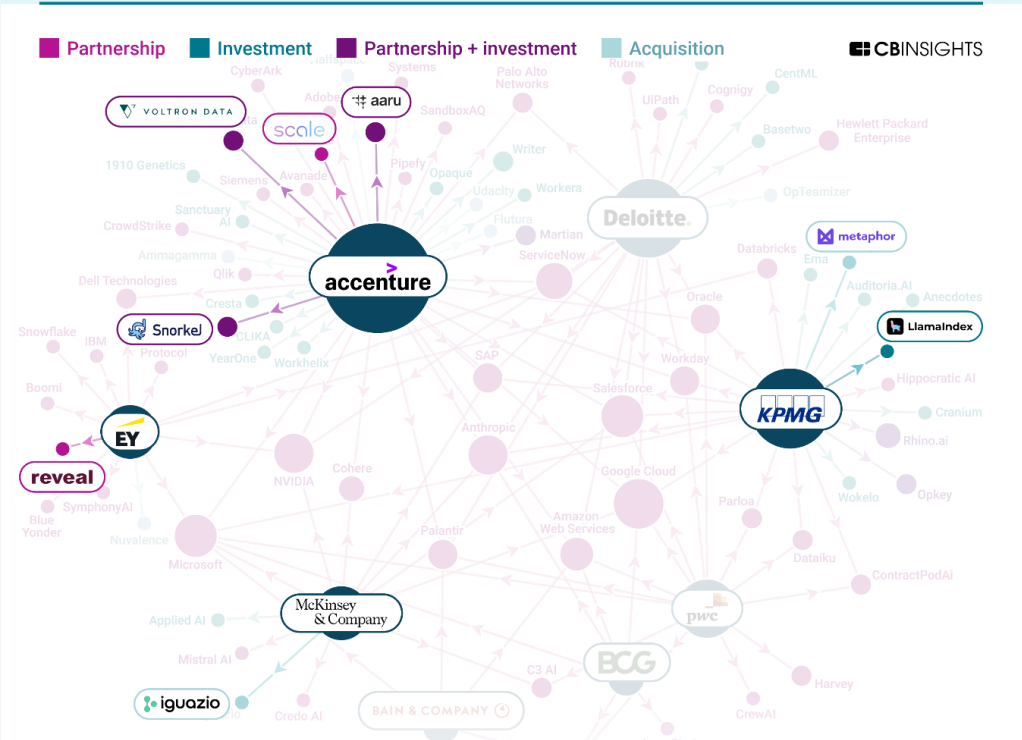
Professional services firm leaders we spoke with cited the following data advantages they can leverage for the AI agent era:

- **Cross-client process visibility:** Firms have observed backend processes across thousands of companies, giving them unique pattern recognition of what works across different industries and organizational contexts
- **Proprietary domain expertise:** Deep, specialized knowledge in regulated sectors (e.g., tax, audit, healthcare, and financial services) combined with years of client deliverables, proposals, and project outcomes
- **Tacit knowledge of expert approaches:** Understanding not just what to do, but how seasoned professionals think through complex, ambiguous problems and make decisions under uncertainty

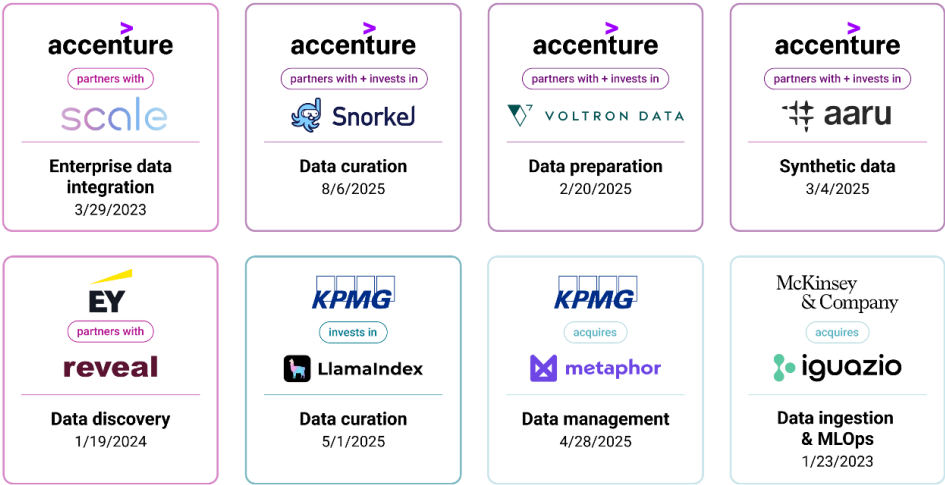
However, firms acknowledge **significant challenges in operationalizing their data** due to client confidentiality constraints, fragmented internal systems, and the difficulty of extracting and standardizing tacit knowledge.

KPMG has been particularly active in recent months. The firm acquired [Metaphor](#) in April 2025 to bolster its data management capabilities, while also working with promising companies like [LlamaIndex](#) (minority investment in May 2025), which helps connect proprietary data sources to LLMs.

Firms look to control AI agent building blocks



Select data infrastructure investments, acquisitions, and partnerships since 2023



Between leading professional services firms and AI companies, enterprise software vendors, and cloud providers, with a focus on AI agents & enabling infrastructure. Not exhaustive of relationships over the time period. Data as of 8/26/2025. © 2025 CB Insights. Source: CB Insights Business Graph

Those that excel at curating and retrieving data will have the advantage, not only in supporting their own teams, but in helping clients design context-rich agents that deliver more reliable, higher-value outcomes.

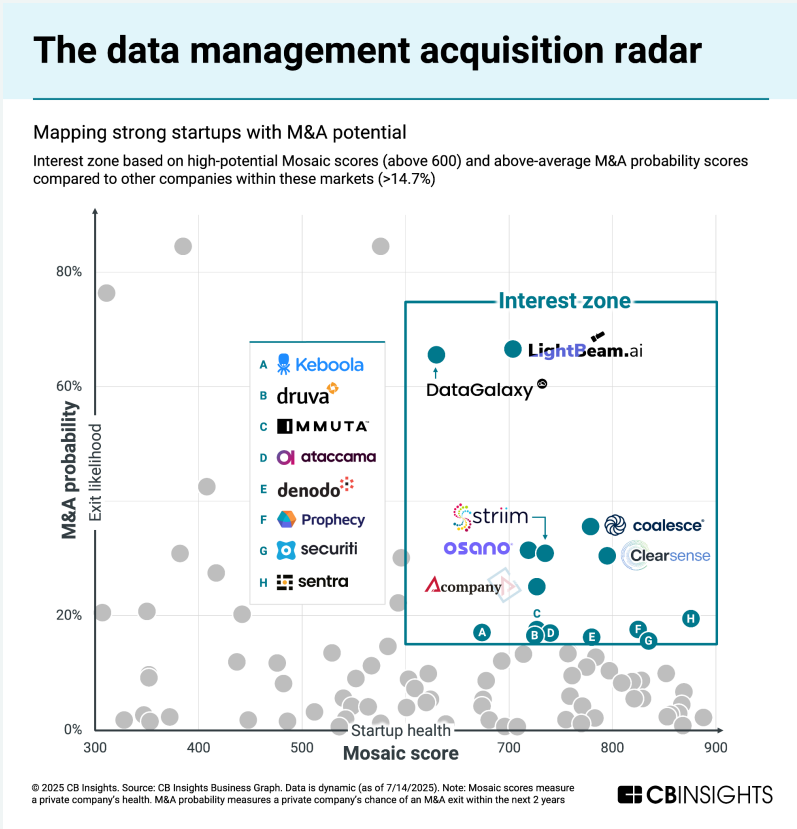
Going a step further, firms like EY are implementing an “AI-ready data flywheel” that combines synthetic data, curated data products, and consent frameworks to enable scalable agentic development — particularly in data-sensitive sectors like finance, where regulatory compliance and PII protection are critical. This approach forms a key foundation of responsible AI, ensuring that innovation is grounded in privacy, transparency, and trust.

Looking ahead, we expect more activity from professional services firms in this area. Using CB Insights’ predictive signals, such as Mosaic and M&A Probability, we identified high-potential acquisition targets in relevant [data management markets](#).

M&A Probability

Predicts the likelihood of a company being acquired within the next 24 months based on historical patterns and current market conditions.

Watch companies in the “interest zone” like data integration and streaming platform [Striim](#) and data privacy & governance software [Osano](#).



 **Identify acquisition targets**

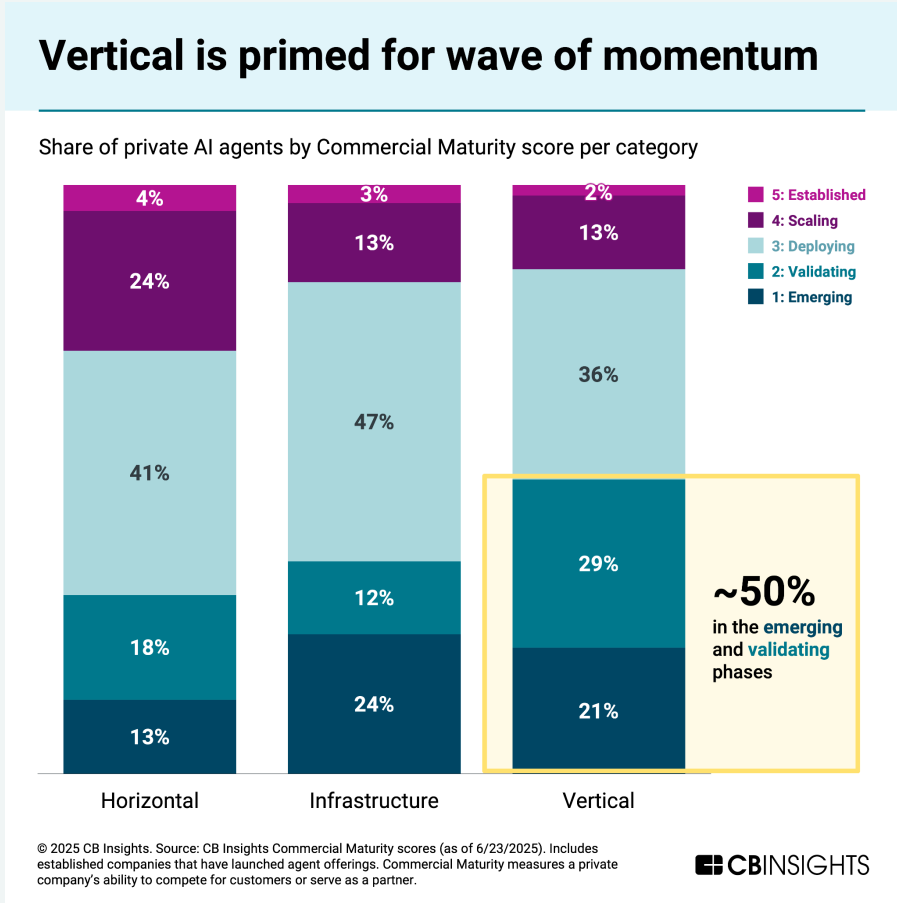
Firms create data moats around core practice areas

Beyond operationalizing their internal data, firms are looking to integrate proprietary, vertical-specific data to build differentiated AI solutions for the industries they serve.

Currently, only one-fifth of the AI agent ecosystem tracked by CB Insights is focused on vertical (or industry-specific) applications. The category is also the least mature of the cohort based on CB Insights Commercial Maturity scores, indicating there’s further room for development.

Commercial Maturity

Measures a private company’s current ability to compete for customers or serve as a partner. Ranging from 1 to 5, it provides a clear, quantitative measurement for where a company lies in its development and growth process.



Professional services firms are well-positioned to lead this shift given their deep domain expertise and access to specialized datasets built over years of client work.

Notable moves based on CB Insights business relationships data include:

- **PwC x Harvey x OpenAI (2023, 2024):** PwC expanded its partnership with [Harvey](#) and OpenAI in October 2023 to create domain-specific models for tax, legal, and HR services. In 2024, they announced the development of a “Tax AI Assistant” for use by PwC’s tax teams built on top of curated tax datasets from 10+ jurisdictions, with plans to expand to 30 more tax jurisdictions.
- **EY x IBM (2024):** EY and [IBM](#)’s “EY.ai for tax” combines IBM’s AI models with EY’s domain expertise to create specialized tax compliance solutions. This includes an “Intelligent Tax Data Lake,” which consolidates data from 36 sources and automates previously manual processes for IBM’s tax department.
- **Accenture x Anthropic x AWS (2024):** This strategic alliance aimed at helping enterprises — especially those in highly regulated industries like healthcare, banking, insurance, and the public sector — responsibly adopt and scale generative AI solutions.

Recent partnerships with AI companies also indicate professional service firms’ growing opportunities to go deep on industry-specific applications in highly regulated sectors. Both PwC (03/18/2025) and McKinsey (01/22/2025) announced collaborations with [C3 AI](#) to build agentic applications for clients in manufacturing, energy, and financial services.

For firms relying on third-party data, the priority is increasingly to **unlock that data across more practice areas** rather than keeping it siloed within external platforms. EY’s “Competitive Edge” platform demonstrates this strategy by integrating proprietary IP with external data sources, covering 25M company profiles and 677M news sources, to accelerate transaction analysis.

However, leaders cite new challenges in negotiating usage rights and integrating third-party sources into their own platforms. Over time, we expect firms to **acquire proprietary datasets outright**, creating data advantages so specialized and tightly coupled to their practice areas that competitors cannot replicate their AI capabilities.

Discover how to put CB Insights data and insights to work with APIs and data feeds trusted by Fortune 500 companies.

[Learn More](#)

Turn services into scalable AI products

The economics of professional services are shifting, as firms move away from one-off, project-based delivery toward scalable, product-like offerings powered by AI agent platforms.

“

We will be able to complete some workstreams faster, maybe much faster. But then **there will also be new workstreams that will be possible that weren't possible before, and that give our clients profound new insights and confidence in underwriting that they couldn't get before.** And these insights can be immediately put into action and value addition post-close.



Richard Lichtenstein
Chief PE Data Officer (Bain & Company)

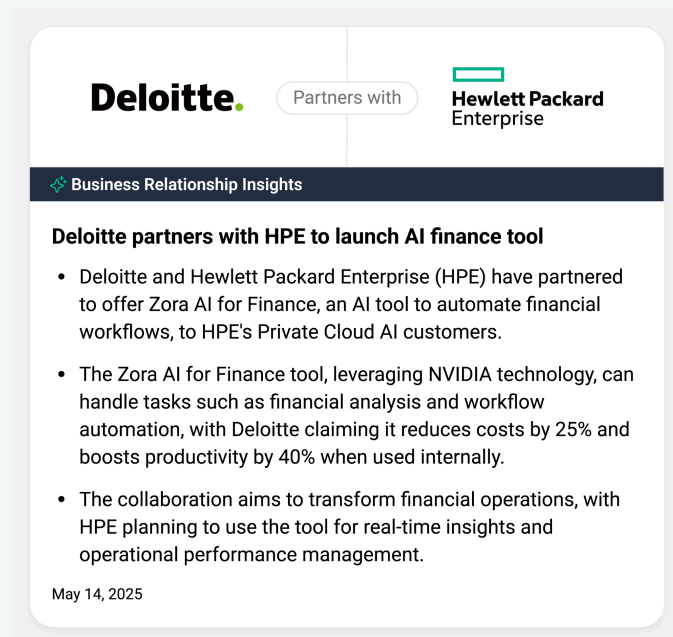
Platform strategies replace project-based delivery

Instead of delivering highly customized services for each client, firms are building AI agent platforms as delivery foundations that enable them to rapidly configure and deploy services at scale.

An important strategic distinction is how firms monetize these platforms. While some firms are selling platform access directly to clients, leading firms like EY, which is leveraging its EY.ai Agentic Platform as a service delivery engine, sell enhanced services on top. This approach allows them to maintain their consulting expertise advantage while improving service delivery speed and capabilities.

Regardless of their monetization approach, firms are converging on a similar technical strategy. Early 2025 launches (as we highlighted in the first section) demonstrate this emerging operating model: build horizontal AI agent platforms that can be tailored by industry and client use cases. These platforms serve as industry-agnostic foundations that firms then customize — whether they're selling the platform directly or using it to deliver enhanced consulting services.

Example deployments include Accenture's partnership with AI-powered beauty marketplace Noli, backed by the L'Oréal Groupe, to develop an "AI Beauty Trust Agent" leveraging Accenture's AI Refinery platform that provides personalized product recommendations, and Deloitte's partnership with [HPE](#) to launch finance agents via its Zora AI platform.



Deloitte. Partners with **Hewlett Packard Enterprise**

Business Relationship Insights

Deloitte partners with HPE to launch AI finance tool

- Deloitte and Hewlett Packard Enterprise (HPE) have partnered to offer Zora AI for Finance, an AI tool to automate financial workflows, to HPE's Private Cloud AI customers.
- The Zora AI for Finance tool, leveraging NVIDIA technology, can handle tasks such as financial analysis and workflow automation, with Deloitte claiming it reduces costs by 25% and boosts productivity by 40% when used internally.
- The collaboration aims to transform financial operations, with HPE planning to use the tool for real-time insights and operational performance management.

May 14, 2025

Reveal a company's strategy with our Business Relationship Analyst agent.

[Learn More](#)

Firms are betting that these implementations — combined with their institutional know-how — will be difficult for other tech vendors to replicate.

This positioning will become increasingly critical as both AI companies and hyperscalers move into consulting territory. OpenAI is debuting its own consulting-style services for AI implementations, as evidenced by CB Insights [AI analysis of OpenAI's job opening data](#).



Hiring Insights

world's most well-known and trusted news organizations transform their business" through applications like "contextual search, personalization, and novel applications."

- **Enterprise deployment expertise** is being built through multiple Solutions Architect and Forward Deployed Engineer roles across three cities (SF, NYC, Seattle), indicating a nationwide enterprise push with high-touch implementation support.
- **B2B platform ecosystem** development is underway with the hiring of a "Product Partnerships, Head of B2B" to "define and

Enterprise deployment expertise is being built through multiple Solutions Architect and Forward Deployed Engineer roles across three cities (SF, NYC, Seattle), indicating a nationwide enterprise push with high-touch implementation support

See how fast private companies are growing, which roles they're hiring, and what it reveals about their strategy with our Hiring Insights Analyst and job openings data.

[Learn More](#)

Meanwhile, cloud giants like Microsoft, Google Cloud, and AWS are increasingly offering direct implementation services, potentially disrupting their own partner ecosystems.

This dual threat accelerates the need for firms to evolve from pure services toward "service-as-software" models that blend product capabilities with implementation expertise.

Strategic startup investments reinvent the consultant's toolkit

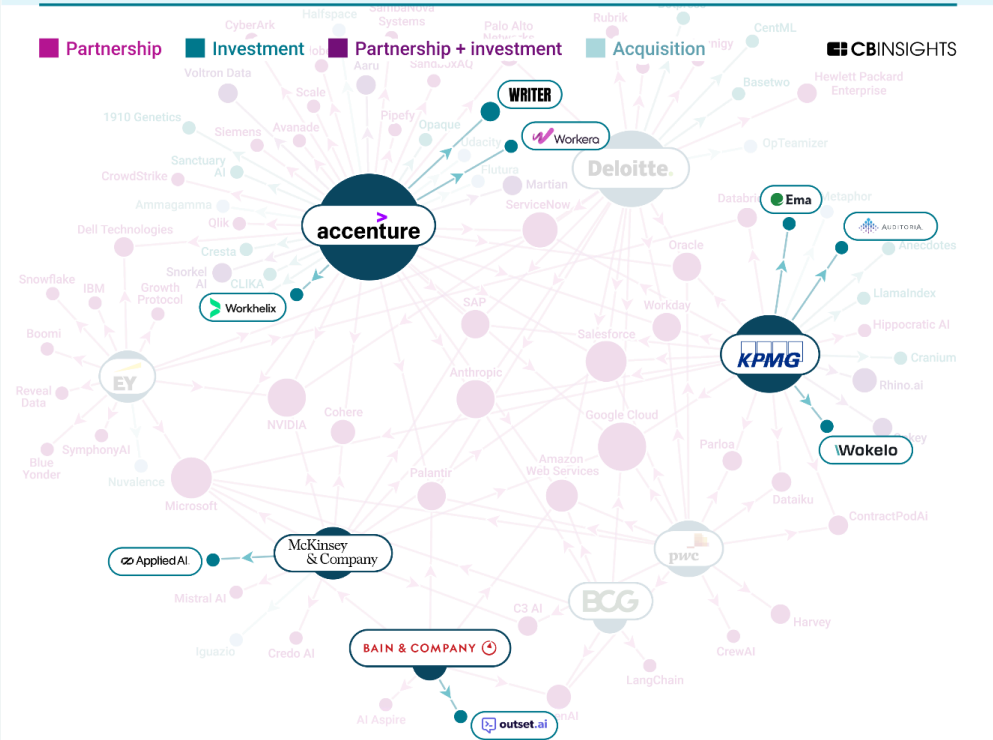
While building agent platforms, firms are simultaneously identifying capability gaps that can be filled through strategic partnerships and investments in emerging technologies.

Accenture and KPMG lead investment activity, backing startups building agentic technologies that automate core consulting & enterprise workflows. Deals so far reflect firms' need to rethink the tools and systems their consultants use to deliver results for clients.

For example:

- **Accenture** invested in [Workhelix](#), which helps companies identify opportunities to leverage generative AI and measure success. Accenture is integrating the company's platform into its LearnVantage learning and skilling service. Accenture also invested in [Workera](#) to accelerate skills-first personalized learning journeys delivered via LearnVantage.
- **KPMG** invested and partnered with [Rhino.ai](#) to deploy the startup's legacy system modernization platform with clients.
- **Bain & Company** backed [Outset.ai](#), which uses AI to conduct market research interviews.

Firms invest in next-gen AI workforce solutions



Select investments in enterprise workflow-related AI startups since 2023

<div>accenture</div> <div>Invests in</div> <div>Workera</div> <div>AI skills intelligence</div> <div>1/21/2025</div>	<div>accenture</div> <div>Invests in</div> <div>Workhelix</div> <div>AI workforce impact analytics</div> <div>2/27/2025</div>	<div>accenture</div> <div>Invests in</div> <div>WRITER</div> <div>Enterprise AI agents</div> <div>11/12/2024</div>	<div>BAIN & COMPANY</div> <div>Invests in</div> <div>outset.ai</div> <div>AI market research interviews</div> <div>6/11/2025</div>
<div>KPMG</div> <div>Invests in</div> <div>AUDITORIA</div> <div>AI agents for finance teams</div> <div>9/26/2023</div>	<div>KPMG</div> <div>Invests in</div> <div>Ema</div> <div>Enterprise AI agents</div> <div>7/31/2024</div>	<div>KPMG</div> <div>Invests in</div> <div>Wokelo</div> <div>AI investment research platform</div> <div>10/1/2024</div>	<div>McKinsey & Company</div> <div>Invests in</div> <div>Applied AI</div> <div>Enterprise workflow automation</div> <div>2/10/2025</div>

Between leading professional services firms and AI companies, enterprise software vendors, and cloud providers, with a focus on AI agents & enabling infrastructure. Not exhaustive of relationships over the time period. Data as of 8/26/2025.
© 2025 CB Insights. Source: CB Insights Business Graph

Track leading professional services firms' AI investments

Startups in Y Combinator’s latest 2025 cohort further reinforce this shift. [Auctor AI](#) and [Cleon](#) have launched AI agent products for SIs and professional services teams to streamline software implementation tasks like discovery and data migration.

Watch emerging startups developing AI solutions targeting professional services firms’ workflows for partnership and investment opportunities.

AI agents for consulting applications

Select private companies based on Mosaic scores (>500)

Companies	Sub-industry	Mosaic Score	Commercial maturity
Harvey	Legal	923	4: Scaling
Hebbia	Business intelligence	878	4: Scaling
Norm AI	Compliance	819	4: Scaling
Greenlite	Compliance	801	3: Deploying
Accordance	Accounting & finance	723	1: Emerging
Wokelo	Accounting & finance	676	4: Scaling
Ravical	Accounting & finance	642	1: Emerging
Across AI	Business intelligence	593	2: Validating
Parcha	Compliance	585	3: Deploying

Source: CB Insights. Note: Mosaic scores (scale of 0-1000) as of 9/23/2025

 [Explore 350+ AI agent companies for investment & partnership opportunities](#)

Shifting service delivery drives pricing model experimentation

The shift toward agent-powered delivery is forcing professional services firms to rethink their economics. As firms build always-on platforms for clients that incorporate agents, several

leaders we interviewed said they expect an **evolution from project-based billing to more software-like models**.

Some firms are already pioneering these new approaches. [Gruve.ai](#), founded by the [Rahi Systems](#) team (acquired for \$225M in 2022), is looking to create a new model for IT consulting by using AI agents alongside human consultants for enterprise AI implementations. Unlike traditional consultancies that bill hourly, Gruve employs a usage-based pricing model where clients only pay when AI solutions deliver specific outcomes, such as detecting security breaches. The startup raised \$20M from Mayfield and Cisco Investments in April 2025.

However, firms face the same value quantification challenge as AI agent startups. Based on 25+ vendor briefings CB Insights conducted, key blockers for those startups include:

- **Cost complexity vs. pricing simplicity:** Backend costs are highly variable (compute, APIs, tokens) but customers want predictable, simple pricing models
- **Value quantification difficulty:** Hard to communicate and justify the value of AI automation, especially when replacing human labor or complex workflows
- **Market confusion and lack of standards:** Prospects often confuse AI agents with basic automation tools, expecting much lower prices with no established market benchmarks

Most companies are experimenting with pricing models. Traditional software pricing models like subscription licensing lead (54%). At the same time, nearly a quarter (23%) of startups we surveyed offer outcome- or performance-based pricing models (e.g., only paying for when the AI agent resolves a customer support ticket).

While one vendor cites “retiring [performance-based pricing] due to the early stage of AI maturity and lack of general predictability,” we **expect increasing experimentation with outcome-based pricing models** as AI performance improves.

For example, Accenture’s engagement with Ecolab includes redesigned workflows using genAI to improve efficiency, increase revenue growth, and deliver cost savings — all tied to performance-based pricing.

Professional services firms that begin testing hybrid pricing models now will be better positioned to capture value as agents become more reliable and measurable.

Build the human-AI workforce

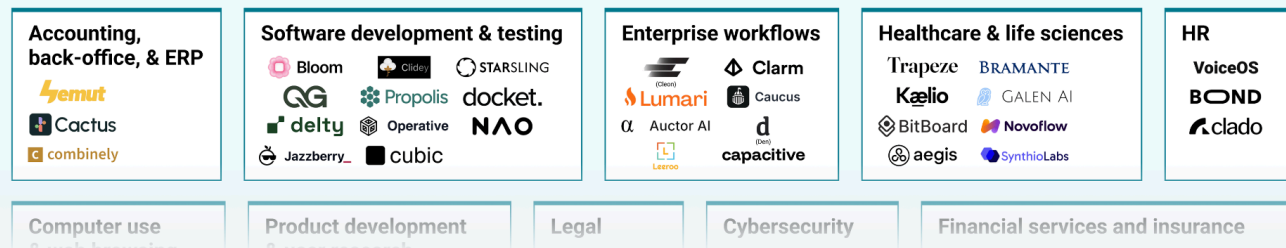
From shifting talent models to deploying agents across operations, leading firms are actively restructuring their workforces to remain competitive in the AI era.

Professional services firms face a workforce restructuring

Startup accelerator [Y Combinator's Spring 2025 batch](#) is a preview of AI's future: over half of the 144 companies are building agentic AI solutions, with startups making inroads in highly regulated industries like healthcare and financial services.

Agentic AI solutions dominate Y Combinator's Spring '25 cohort

Agentic AI solutions



Review the [full market map and key trends here](#).

As AI agents move up the value chain, professional services' internal talent and organizational structure must evolve.

EXECUTIVE DISCUSSION SPOTLIGHT

AI workforce impact

Firms we interviewed predicted the following workforce shifts:

- **Inverting the pyramid staffing model:** The traditional consulting pyramid (many juniors per partner) is under pressure. As AI handles routine work, the model is inverting toward senior-heavy, specialized teams.
- **Precision hiring for the AI age:** Firms need fewer but more selective early career hires focused on curiosity, creativity, and adaptability, with baseline AI fluency expected.
- **Retraining staff as agent managers:** Workers will become “agentic product owners” orchestrating AI systems rather than executing tasks directly. The human role shifts to oversight, validation, and strategic direction.

Current leading firms' strategies based on publicly disclosed initiatives include:

- **Reskilling at scale:** Major firms are investing heavily in workforce transformation. Accenture said in January 2025 it had trained 500,000 employees to use generative AI and launched “LearnVantage,” an AI-skills-focused learning platform for clients through its acquisition of edtech platform [Udacity](#) in 2024.
- **Creating internal intelligence engines:** [Firms are deploying chatbots and assistants](#) that streamline employees' day-to-day, such as research & writing tasks and knowledge retrieval. Each month, over 240,000 EY people use EYQ, the firm's genAI tool built on the EY.ai Agentic Platform.
- **Front-running agent adoption:** Building agents that they can test internally and then deploy to clients. For example, EY is initially deploying 150 agents built with Nvidia to 80,000 employees focused on tax compliance, using a “client zero” approach to validate solutions.

“

At EY, we're harnessing the EY.ai Agentic Platform — powered by NVIDIA — to deploy autonomous agents across Tax, Risk, and Finance as part of our Client Zero initiative. **This enterprise-scale platform gives us the ability to expand AI with confidence, anchored in trusted data, rigorous risk controls, and domain expertise.** By enabling human+AI hybrid teams, it empowers EY professionals to deliver transformative value optimization — today.



Matt Barrington

EY Global AI Technology Leader and Americas Chief Technology Officer

Looking ahead, senior professional services firm leaders we interviewed predict hybrid human-AI models for their workforces, such as “tiger teams” of humans and agents taking on client projects and “foremen” managing agents.

“

Fluently using AI tools is now table stakes in professional services. New hires straight out of college are expected to perform at a senior associate level because AI is their teammate from day one. The bar has shifted from technical literacy to AI fluency. This isn't about job loss or blind automation — it's about amplifying human judgment, accelerating trusted insights, and unlocking creativity. **The future of professional services belongs to AI-native problem solvers who blend domain expertise, creative thinking, and AI to deliver real client value.** And the real differentiator? Growing into AI agent bosses — professionals who build, manage, and direct & orchestrate multiple AI agents like running a high-performance team to deliver transformative outcomes.



Swami Chandrasekaran
Principal, Global AI & Data Labs
(KPMG)

Several emphasized that senior expertise will remain critical as AI and agents evolve — not only for industry experience but also to manage complex, ambiguous work, with clients continuing to rely on human judgment for strategic direction.

Recent public company earnings calls reflect this emphasis on human-AI collaboration, indicating the speed of this approaching transition.

Salesforce CEO Marc Benioff [noted agents](#) “are not tools, they are becoming collaborators... working 24/7 to analyze data, make decisions, take action... freeing up humans to focus on strategic initiatives and building meaningful relationships.” Meanwhile, [Palantir](#) CTO Shyam Sankar highlighted the need for “[mixed human-AI teams](#)” and [users overseeing agents](#).

Palantir CTO highlights focus on users “supervising an army of agents”

Earnings Calls

Transcript | Q4 2024

► 8:56 Shyam Sankar

We are convinced the normative value for AI is enterprise autonomy, the self driving company. **Users go from performing the workflow to supervising and army of agents**, teaching them how to handle edge cases and reducing dwell time. **This is where we are maniacally focused with our customers.** We've been working with a large multinational bank to automate core back office processes. What used to take 5 days now takes 3 minutes. Much more than labor savings, this improvement eliminates historical constraints on the middle office and now enables the bank to create entirely new and differentiated financial products.

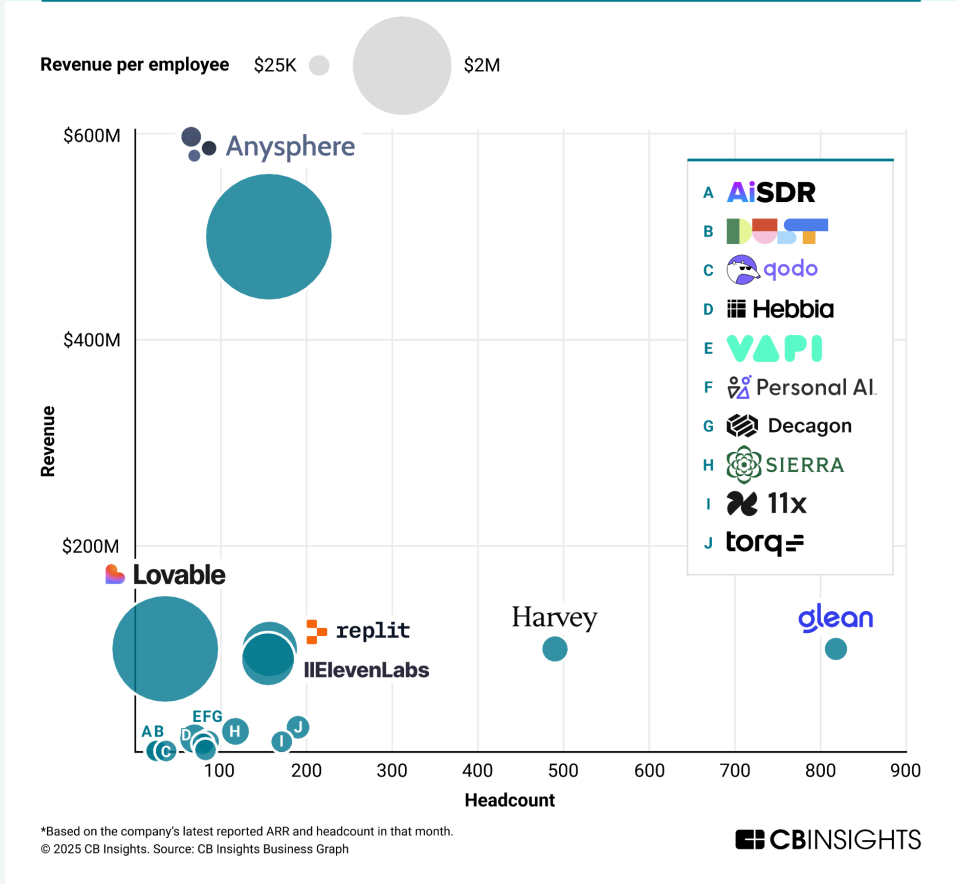
Source: CB Insights Earnings Calls

AI-native startups preview the future efficiency of enterprise workforces

The most efficient AI agent startups showcase what’s coming: the lean operational models that will define competitive advantage across industries.

Both [Anysphere](#) (behind Cursor) and [Lovable](#) in coding applications far outstrip the rest of the AI agent landscape in terms of revenue per employee, clocking in at over \$2M.

Coding AI agent startups lead in revenue per employee



With just 45 employees and \$100M in ARR, Lovable’s head of growth describes the company’s team as “AI-native employees” – or employees that default to using AI tools to build. Key is also an environment where the org structure – minimal layers of management and process – enables speed.

These efficiency levels set the benchmark for where enterprise productivity is headed – and professional services firms must adapt to remain competitive as their clients achieve similar operational leverage.

We're building the world's largest, high-quality private company revenue dataset, with full transparency into where it came from. Now up to 600k private companies, rolled up into year-by-year estimates.

[Learn More](#)

Managing AI becomes a new competitive moat

Beyond enabling their own workforces, professional services firms are positioning themselves to help with the “human problem” of AI adoption.

In the next year, we expect employee training and change management will become critical areas of support as AI agent implementations progress, based on our survey of 60+ organization leaders in June 2025.

What external support did you require or would you need to implement AI agents?

Based on survey of 60+ organization leaders* in June 2025

Support type	% need	Description
Vendor/partner support	40%	Help navigating vendor selection in rapidly evolving market; partnership with consultants for implementation and strategy
Technical integration	39%	Integration with existing legacy systems; API connectivity and workflow automation; system compatibility; custom code development
Training & knowledge	35%	Team education on AI/ML fundamentals; prompt engineering techniques; role-specific use case identification; legal and ethical AI usage guidelines
Security & compliance	11%	Data privacy and confidentiality management; compliance guidance for regulated sectors; human-in-the-loop rights management
Change management	5%	Employee resistance due to job displacement fears; internal adoption support; cultural transformation
No external support	14%	AI services companies with internal expertise; organizations with robust internal AI teams; companies building expertise in-house rapidly

© 2025 CB Insights. Source: CB Insights survey data. *Director-level or above at organizations with 250+ employees; 56% work at companies generating more than \$100M in revenue and 31% have revenue over \$1B.



In the coming 5 years, managing AI agents — and eventually other AI form factors, like humanoid robots — will be key opportunities firms must get ahead of.

Tech markets provide a window into this next wave of innovation that firms will need to help clients navigate. [Across 1,500+ markets CB Insights tracks](#), the leading markets by equity deal activity in 2025 so far are dominated by AI agents and related infrastructure.

AI agents dominate top markets by deal activity in 2025 so far

Tech market	Count of equity deals
Industrial humanoid robot developers	48
Coding AI agents & copilots	43
AI agent development platforms	28
Legal AI agents & copilots	26
Large language model (LLM) developers	24
SOC AI agents & copilots	22
AI observability & evaluation	20
AI-derived small molecule drugs	20

Source: CB Insights. Data as of 9/23/2025

Notably, the [industrial humanoid robot developers](#) market is the most active, signaling that professional services firms should prepare for a future where they'll need to help clients manage not just digital agents, but physical robot workforces as well.

Discover the use cases leading adoption, promising companies, & key trends in [the humanoid robots market map](#).

In upcoming research on the future of professional services, we'll dive deeper into competition in the "service-as-software" market and firms' evolving talent models.