



AI WORKFLOW INTELLIGENCE · PROFESSIONAL SERVICES

Professional services firms run on expert judgment. But most of what slows them down has nothing to do with judgment. It happens before a professional ever sees the work. For years, the answer to that problem was automation: “tell us your process and we’ll digitize it.” It produced faster forms and cleaner portals. It did not produce intelligence.

THE CATEGORY WE'RE CREATING

From workflow automation to workflow intelligence

Trisk is building the intelligence layer that sits inside how professional work actually happens: requests submitted, evidence collected, files reviewed, corrections made, rework repeated. That operational data has never been systematically captured, structured, or used.

Traditional automation	Trisk workflow intelligence
Automates a known workflow	Finds friction inside real work
Depends on firms knowing what to fix	Guides firms to highest-impact opportunities
RPA with AI added on top	Turns existing operational data into immediate insight
Digitizes the process	Improves evidence quality before review begins

Trisk gives SMB owners a practical path to AI adoption: **start with one high-value workflow, prove the impact, then scale from there.**

THE DATA POSITION

Access to signals no generic AI tool ever sees

Trisk sits inside the intake, review, and correction cycle, where signals that predict quality, delay, and margin erosion are generated. Not summarizing documents after the fact. Not answering domain-specific questions. Inside the work itself.

11,500Professional services
engagements analyzed**188K+**Question responses
across engagements**24K**Client-provider
interactions studied

The pattern is consistent across every field we've studied. Tax was the proving ground, 11,500 engagements deep, and the same broken intake cycle runs through law, insurance, advertising, architecture, and any professional services work where expert judgment depends on upstream information being complete, accurate, and ready. Friction is invisible, structural, and recurring, which makes it **measurable, improvable, and valuable to own.**

That analysis is already embedded in Trisk's intelligence. New customers don't start from zero. They start with the pattern recognition built from thousands of engagements already processed, and it sharpens further with every one they add.

THE ARCHITECTURE

One platform. Every firm's process is the data.

The intelligence adapts.

The intake cycle breaks the same way in every profession. Trisk fixes the process once. The knowledge layer adapts by domain.

Tax was first. Law, insurance, advisory, and architecture follow the same pattern: different vocabulary, same broken loop. The 11,500 engagements already analyzed aren't just a tax asset. They're proof the model works anywhere the same problem exists.

The more firms use it, the smarter it gets for all of them. That's not a feature. That's a moat.

WHY THIS MOMENT

Three forces converging

- 1. The AI adoption wave in professional services is already underway.** Early-moving firms are pulling ahead on margins, client retention, and scalability. For firms that wait, the gap is becoming visible. Clients expect it. Talent expects it. Acquirers are already pricing for it.
- 2. Generic AI tools are not the answer.** They summarize, generate, answer questions. They don't know where a specific firm loses time, which clients create the most rework, or where the margin is leaking. That requires operational data no generic tool has.
- 3. The workflow automation market is being disrupted.** RPA and traditional BPM are being re-evaluated as AI matures. The platforms that define what comes next, intelligence rather than automation, will capture disproportionate value.

THE BUSINESS MODEL

Intelligence valuable at three levels

Trisk embeds in a firm's operational layer, its existing data and live operations, to surface where friction concentrates, what predicts rework, and where AI delivers measurable ROI. It compounds with every engagement.

1. Firm level

Day-one visibility into where work actually breaks down, then cleaner intake, faster reviews, less rework, and stronger margins as that visibility turns into action across offices and acquired practices.

2. Platform level

Pattern recognition that sharpens across every firm on the platform. The more firms use it, the smarter it gets for all of them. No individual firm could build this alone.

3. Market level

A defensible governance layer as AI moves from generic tools into business-critical professional workflows.

THE OPPORTUNITY

One intelligence layer. Every evidence-heavy profession.

Once embedded, the position is difficult to displace. A firm's own operational history becomes the moat: proprietary pattern recognition built from their specific clients, teams, and failure points. New hires, new clients, acquired practices, and new service lines continuously regenerate the intake problem, and Trisk gets smarter about all of it over time. No outside tool can replicate that. No competitor can buy it. And no firm that cancels gets it back.

Every firm has friction. Most of it is invisible.

We make it measurable and show exactly where AI creates real ROI.

SOC 2 Type II

GDPR Compliant

HIPAA ready