

THE PLAYBOOK · 2026 EDITION

# The Salesforce PSA + AI Agents **Playbook**

How professional-services teams run projects with AI agents and human consultants on the same Salesforce — the Hybrid Project Delivery operating model, the Outcome Review control loop, and a 3-week go-live path.

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## 01 · WHERE YOU ARE TODAY

# Why Hybrid Project Delivery

PS firms don't have an AI problem. They have a coordination problem.

The work gets done. The hours just don't get logged on time, the status report is three days stale before anyone reads it, and the budget overrun shows up at month-end instead of the week it started. None of that is a skills gap. It's the cost of humans coordinating delivery by hand across spreadsheets, email, and four disconnected tools.

Hybrid Project Delivery fixes the coordination layer, not the people. Human consultants lead the relationship and the judgment. AI agents handle the repetitive coordination — chasing timesheets, drafting status updates, flagging budget risk, preparing invoices — and stop at a human approval before anything ships. Same Salesforce, same project views, one new interface where humans approve what agents produce.

**68.9%**

average billable utilization in 2024 — against a 75% optimal

**1 in 5**

billable hours go unrecorded under manual time tracking

**73.4%**

industry on-time delivery rate — communication and follow-through among the cited root causes

Sources: SPI Research 2025 Professional Services Maturity Benchmark (utilization, on-time delivery); Tribes.ai via Timely, 2023 (unrecorded hours — vendor-adjacent estimate).

## The four stages of delivery maturity

Every PS organization sits on a maturity spectrum. Most are stuck between Stage 1 and Stage 2 — and the jump that pays isn't to more software, it's to coordination that runs itself.

**STAGE 1 — MANUAL****Reactive firefighting**

Spreadsheets, email threads, tribal knowledge. Timesheets are a weekly battle. You learn about problems after they hit the P&L.

**STAGE 2 — CONNECTED****Unified platform**

One PSA connects projects, resources, time, and billing. Data flows. You can see the problems — you're still solving them by hand.

**STAGE 3 — AGENT-ASSISTED****Agents deliver alongside humans**

AI agents join delivery as resources. They draft recaps, chase timesheets, flag risk, prepare invoices — every action routed through human approval.

**STAGE 4 — AUTONOMOUS****Self-optimizing delivery**

Agents predict risk weeks ahead, rebalance resources proactively, and improve the process from outcome data.

**You don't have to start at Stage 1.**

Most teams move to agent-assisted delivery from Stage 2. The maturity model isn't a gate — it's a roadmap. The rest of this playbook shows you how to cross it in three weeks.

## 02 · HOW IT WORKS

# The Hybrid Project Delivery operating model

Humans lead. Agents deliver. On the same Salesforce, in the same views.

In Klient PSA, an AI agent is a Resource record of type Agent in Salesforce. A PM assigns it to a task through the same interface used for a human consultant, and it appears in Gantt charts, task boards, and resource views alongside the team. No new dashboard to learn — agents show up where work already lives.

Klient PSA extended its resource model so agents do the coordination work and humans keep the judgment. The agents stop where your judgment begins. Each agent owns one job and hands its output to a human before anything moves forward.

## The squads

Klient PSA agents are Salesforce Agentforce agents — not features bolted onto the PSA, but the operating model itself.

### PSA Squad — keep delivery on the rails

- **SCOPEY 1** — takes a plain-language request, asks one clarifying question, writes a four-part structured scope (Why / What / Edge Cases / Constraints) with acceptance criteria, and creates a Klient PSA task held for human approval. Nothing gets built until a human signs off.
- **PLANNY 1** — a read-only project monitor. Sends configurable morning and night briefs and a week-ahead summary on demand. Reads tasks, milestones, and status; writes nothing.
- **TIMEY 1** — starts from the planned schedule, layers in calendar, email, and Slack to infer what was actually worked, assembles a draft timesheet, sends a submission alert, and waits for a 15-second human approval before submitting.

### Customer Success Squad — keep clients close

- **GUIDY 1** (onboarding), **TOUCHY 1** (meeting recaps and follow-ups), and **CASEY 1** (cases) handle the post-sale coordination — every client-facing draft staged for human approval before it sends.

## We ran this on ourselves first

Klient is Customer Zero — every agent ran on Klient's own delivery before any customer saw it. The proof is in our own numbers, not a benchmark anyone can cite.

# 150–200

### HOURS/YEAR RETURNED TO BILLABLE WORK — AT KLIENT

Klient is a software company, so it runs its own delivery on the same agents. **KNOWWY 1** now writes the product documentation that a senior analyst used to draft by hand — about **50 releases a year** — recovering 150–200 hours back to billable work. The point isn't the documentation; it's that we run the operating model we sell.

### And the failure modes are designed in.

The approval gates and the Outcome Review object exist because Klient ran the system *without* them, measured where unreviewed agent output went wrong, and built the control loop from those lessons. Customers get the operating model Klient runs on itself — including the scars. Every Klient go-live since lands on time.

## 03 · THE CONTROL LOOP

# The Outcome Review control loop

The one place where humans and agents meet — and where your judgment stays in control.

The Outcome Review is a Salesforce object in Klient PSA that serves as the exchange interface between agents and humans. When an agent finishes a task, it creates an Outcome Review record containing its output. The human reads it, edits if needed, and approves or rejects. Nothing the agent produces reaches a customer, a knowledge base, or a downstream record without a human approving the Outcome Review.

This is the difference between automation and Hybrid Project Delivery. Automation fires a rule when a condition you anticipated is met. An agent is assigned to a task with full context and acceptance criteria, decides how to execute, and stages the result for review. Automation handles the cases you anticipated. Agents handle the cases you didn't — and the Outcome Review keeps every one of them under human sign-off.

## From task assigned to outcome approved



## A worked example: TIMEY 1 and the Friday timesheet

TIMEY 1 starts from the planned schedule, then reads the week's calendar events, emails, and Slack to infer what was actually worked. It assembles a draft timesheet and raises an Outcome Review. The consultant opens it, sees the hours mapped to the right projects and tasks, corrects one line, and approves — about 15 seconds. The hours are now booked, on time, against the right billing milestone. No Friday-afternoon battle, and no week of unrecorded billable time quietly written off.

**The agent never has the last word. The agents stop where your judgment begins — and the control loop is the product.**

Every output is a draft until a human approves it in the Outcome Review. That's how you get the speed of automation without handing client-facing judgment to a machine.

## 04 · THE ROADMAP

# The 3-week go-live path

From signed to live on a single platform — in weeks, not months.

Klient PSA deploys out of the box with pre-built templates for projects, tasks, roles, and billing rules — no lengthy discovery, no custom build before you see value. Here's what a real three-week go-live looks like.

**Week 1 — Foundation****Stand up the platform on real data**

Configured with your templates, roles, and billing rules; active and recent projects migrated so the data is real from day one.

- Klient PSA configured with your templates, roles, and billing rules
- Active + recent completed projects migrated with actuals
- Core team accounts and resource records created

✓ End of week: your delivery org has one source of truth.

**Week 2 — Adoption****Get the team working in the system**

Guided training on time entry, project views, and resource management — days, not months. Dashboards and approval workflows tuned to how your firm runs.

- Team trained on time entry, project views, and resource management
- Executive dashboards live (utilization, revenue, project health)
- Approval workflows validated — nothing reaches a client without sign-off

✓ End of week: the team is live and timesheet compliance is climbing.

**Week 3 — Agents on****Activate the first agents alongside the team**

Start with the highest-frequency, lowest-risk work. TIMEY 1 drafts timesheets and submission nudges; PLANNY 1 sends status briefs — every action staged in an Outcome Review for approval.

- TIMEY 1 activated — draft timesheets and submission alerts
- PLANNY 1 activated — morning/night briefs and week-ahead summaries
- First billing cycle run through Klient PSA

✓ End of week: agents are delivering alongside the team, under human approval.

**After go-live.**

From here you expand agent coverage and add SCOPEY 1 for requirements and the Customer Success Squad for client coordination — at your pace, each agent earning its place against the metrics in the next two sections.

## 05 · WORKSHEET

# Audit your delivery gaps

A diagnostic to find where revenue, time, and margin are leaking — before you fix anything.

Before you can fix delivery, you have to measure it. Score each area 1–5 (1 = completely manual or broken, 5 = automated and optimized). Any area scoring 3 or below is a gap that's actively costing you revenue this quarter.

*The invoice sat eleven days while the milestone was already signed off. The consultant's Tuesday afternoon never made it onto a timesheet. The budget passed 12% three weeks before anyone ran the report. None of it was a skills problem — it was the gap between work done and work captured. That gap is what this table measures.*

DELIVERY AREA	WHAT TO MEASURE	RED FLAG	SCORE
<b>Time capture</b>	% of timesheets submitted on time. Average days late. Hours never logged.	● < 80% on-time	/ 5
<b>Revenue recognition</b>	Days from milestone completion to invoice sent. Billable hours never invoiced.	● > 7-day lag	/ 5
<b>Resource utilization</b>	Actual vs. target utilization. Bench time. Over/under-allocation visibility.	● < 70% billable	/ 5
<b>Project health</b>	How often you catch budget overruns before they pass 10%. Status cadence.	● No proactive alerts	/ 5
<b>Client communication</b>	Hours/week per PM writing status updates, recaps, and follow-ups.	● > 3 hrs/PM/wk	/ 5
<b>Resource planning</b>	Can you see conflicts 2+ weeks ahead? How often are resources double-booked?	● Weekly conflicts	/ 5
<b>Invoicing accuracy</b>	% of invoices disputed by clients. Write-offs as % of billed revenue.	● > 3% disputes	/ 5

**The hidden cost.**

Two industry anchors put a floor under the gap: billable utilization averaged 68.9% in 2024 against a 75% optimal, and roughly one in five billable hours goes unrecorded under manual time tracking. The gap between your scores and a 5 is revenue you earned and didn't keep.

Sources: SPI Research 2025 PS Maturity Benchmark (utilization); Tribes.ai via Timely, 2023 (unrecorded hours — vendor-adjacent estimate).

**Tally your scores.** Below 21 out of 35, your delivery operation is costing you more than you think — and you're an ideal candidate for agent-assisted delivery.

## 06 · WORKSHEET

# Agent-readiness checklist

15 prerequisites to evaluate before you put agents on your projects.

Agents are only as effective as the data and processes they run on. You don't need perfection — you need a foundation. Check what's already true today.

## Data foundation

- All project, time, and billing data lives in a single system (not spreadsheets)
- Time entries are tied to specific projects, tasks, and billing milestones
- Resource skills, availability, and allocation are tracked centrally
- Project budgets, billing schedules, and milestones are defined upfront
- Historical project data exists (completed projects with actuals vs. estimates)

## Process readiness

- Timesheet submission has a defined cadence (daily or weekly)
- Invoice generation follows documented rules (milestone, T&M, fixed-fee)
- Status reports have a consistent format and delivery schedule
- Resource requests follow a defined approval workflow
- Escalation paths exist for budget overruns and timeline risks

## Organizational alignment

- Leadership supports AI-assisted delivery as a strategic initiative
- PMs are open to agents handling routine tasks with their approval
- Clear ownership exists for who approves agent actions (invoices, emails, staffing)
- The team understands agents augment humans — they don't replace them
- Budget is allocated for a PSA platform investment or migration

### You don't need all 15.

Teams with 8 or more items checked have a strong enough foundation to start. The remaining gaps usually close inside the first weeks of go-live, as the platform enforces the structure for you.

07 · GET BUY-IN

# Build the business case

Frame it as a margin initiative, not a software purchase — and it gets approved.

Hybrid Project Delivery isn't a technology line item. It's a margin improvement program. Quantify it across three layers — the same three the Klient PSA Revenue Recovery Estimator on klient.com calculates for your firm.

**Layer 1 — Timesheet hours recovered · TIMEY 1**

Manual time tracking loses roughly one in five billable hours. Agents draft the timesheet from the planned schedule and chase submission, so hours get booked on time against the right milestone instead of being written off.

**Layer 2 — PM reporting hours freed · PLANNY 1**

Project managers spend hours each week on status updates and timesheet chasing. PLANNY 1 drafts the briefs and the week-ahead summary; a PM who gets that time back can carry another project without burning out.

**Layer 3 — Scope overruns caught early · SCOPEY 1**

Only 13.1% of projects need zero scope changes, and the average project carries 1.65 contract modifications. Catching overruns in real time — not at month-end — protects the margin you already sold.

Source: SPI Research 2025 PS Maturity Benchmark, Table 218.

## A worked example — 50-person firm at \$175/hour

Timesheet hours recovered <small>TIMEY 1</small>	<b>\$100,800</b>
PM reporting hours freed <small>PLANNY 1</small>	<b>\$42,000</b>
Scope overruns caught early <small>SCOPEY 1</small>	<b>\$57,900</b>
<b>Estimated annual recovery</b>	<b>~\$200,700</b>

Illustrative scenario, not a guarantee. Method: consultants' recovered hours (team minus PMs) and PMs' freed reporting hours valued at the bill rate, 20% assumed to convert to new billable work, across 48 working weeks; PMs estimated at 20% of team. Scope layer = annual billable revenue (at 68.9% utilization, SPI Research 2025) × a conservative 0.5-point recoverable slice of SPI's revenue-leakage benchmark. The 1.5 hrs/week and 2.5 hrs/week recovery rates, the 20% conversion, and the leakage slice are Klient estimates pending in-product confirmation — not SPI figures.

**From \$39**  
/user/month · Klient PSA

**\$1,000**  
one-time per agent · Squad of 3 for \$2,700

**3 weeks**  
to go-live

Pricing as listed on klient.com; agent execution uses ~20 Salesforce Flex Credits, purchased from Salesforce. One scope overrun caught typically covers the platform for a year.

**Run your own number.**

The Revenue Recovery Estimator on klient.com turns your team size, bill rate, and active projects into an annual recovery figure across these three layers — a board-ready starting point in about 20 seconds.

## Answer the three objections before they're raised

### "We already have a PSA."

If you're on Certinia, you're paying far more for a system with no AI agent roadmap. If you're on Monday, Asana, or Smartsheet, you're running project management — not professional services automation. You're missing billing, revenue recognition, and resource management.

### "AI isn't ready for client-facing work."

That's exactly why every agent action routes through the Outcome Review. Nothing reaches a client without human sign-off. The real risk is another year doing by hand what agents can draft in seconds.

### "Our processes aren't mature enough."

That's the best time to start. Klient PSA's templates, roles, and out-of-the-box workflows give you structure you don't have today. You're not automating chaos — you're replacing it with a system that has guardrails built in.

## See it on your own projects

A 30-minute walkthrough on real Klient PSA data — your engagement types, your billing model, your go-live path.

[Book a Demo →](#)