



# Professional Services

## Growth Outside the Comfort Zone

Moving from Service Provider  
to Growth Partner

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Transforming businesses for growth



## Introduction

For decades, professional services firms thrived by positioning themselves as trusted experts to clients. Audit, tax, and advisory were sold as premium access to expertise, often delivered in repeatable formats. But that era is ending. Clients today are not buying expertise for its own sake. They are asking for something far more demanding: solutions that are embedded in their workflows, connected to their growth engines, and designed to evolve as their business evolves. Clients don't want yet another presentation or opinion. They want growth. They want partners who solve their real pain points, not just tidy up the back office. They want insights that translate into operational flow and recurring value.

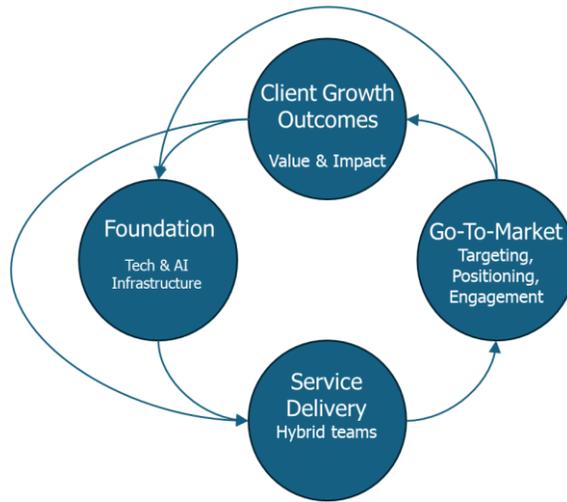
The uncomfortable truth is that accounting firms clinging to the old model are slipping toward commoditization. Audit and tax are being reshaped by AI and automation. Advisory engagements risk becoming one-off, interchangeable projects. And leadership teams who double down on efficiency metrics or roll-up acquisitions are only buying themselves more time, not future proofing their business. This means professional firms must reframe their value proposition. The real prize is not being the smartest advisor in the room, but being the one who rebuilds the room, combining judgment with platforms, data, and subscription models that clients cannot live without.

## New Approach to Interacting with Customers – Flywheel of Trust Value & Momentum

With all the market challenges facing businesses today, Audit, Tax, and Advisory firm clients want embedded solutions that integrate seamlessly into their workflows and operating systems. The Audit, Tax and Advisory firms that will be the winners will not be just selling time; they will be building platforms, launching subscriptions, and delivering scalable, repeatable products that drive real business impact for their clients. This will make accounting firms sticky to their clients and will be hard to dislodge by other competing firms.

The Flywheel of Trust, Value, and Momentum is designed to help Audit, Tax, and Advisory firms center their efforts on customer needs, collaborating with clients to co-create solutions that generate a virtuous cycle of mutual benefit and sustained growth. Each part of the accounting firm's model feeds the next, creating a continuous loop of reinforcement:

- **Foundation → Service Delivery:** Technology and AI create the base, enabling hybrid teams to work differently. When AI handles data ingestion, automation, or compliance monitoring, professionals can focus on higher-value insights.



The more value clients realize, the more trust they give; the more trust they give, the more opportunities Audit, Tax and Advisory firms unlock.

Source: Idea Innovate Consulting

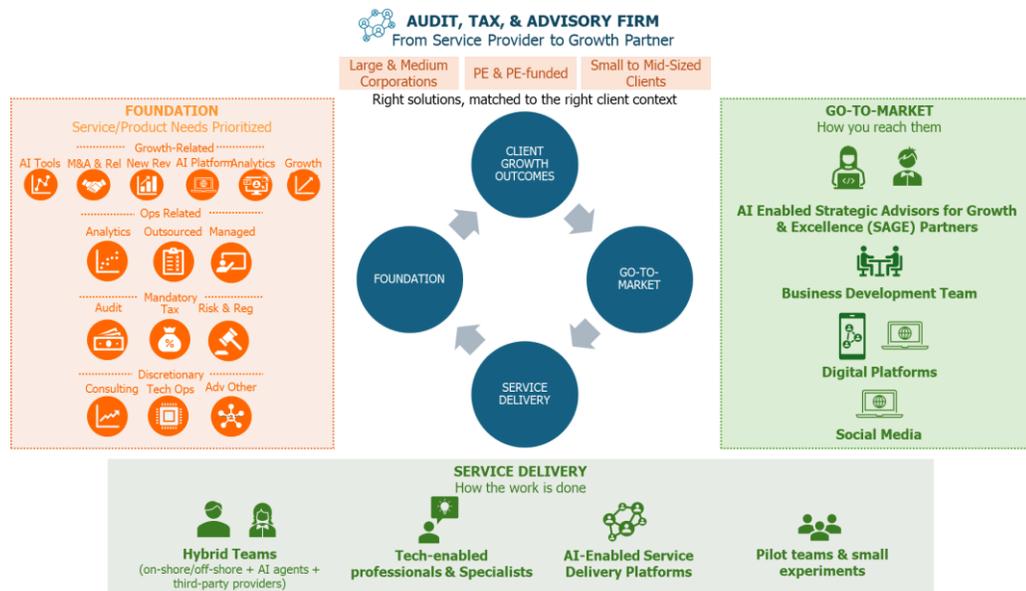
- **Service Delivery → Go-to-Market:** Successful pilots and client engagements generate stories, proof points, and new offerings that strengthen how firms position themselves in the market.
- **Go-to-Market → Client Growth Outcomes:** Stronger positioning leads to better client alignment, creating sticky relationships where firms become embedded in their clients’ operations.
- **Client Growth Outcomes → Foundation:** Client results and feedback feed directly back into the system, guiding what new capabilities and technologies to invest in next.
- **Cross-cutting effect:** Outcomes also fuel internal trust and talent engagement, making it easier to run the next set of experiments and spin the wheel faster.

The more the flywheel spins, the faster firms build trust, value, and client stickiness, until momentum itself becomes their competitive advantage. Each success creates another, building a self-reinforcing cycle where firms are no longer just service providers but irreplaceable growth partners.

## Product & Service Offerings

Historically Audit, Tax and Advisory firms have viewed themselves as selling their expertise to clients and charging them for it. That is no longer a valid path to growth. Annuity models like compliance monitoring, managed finance, or AI-enabled diligence are the way to the future. They create client stickiness that goes far beyond relationships, and they embed the firm into the client’s operating system.

- **Advisory** - Advisory services have been viewed as a primary area of growth for accounting firms. Many of the legacy offerings are increasingly misaligned with market demand. Traditional strategy, operations, and risk advisory are experiencing diminishing returns, while mid- and back-office solutions—such as Client Accounting Services (CAS), Managed Service Providers (MSPs), and Managed Security Service Providers (MSSPs), remain operationally relevant but lack strategic differentiation.



Source: Idea Innovate Consulting

The inflection point lies in shifting from operational support to growth enablement. Some progressive firms reorienting toward high-value, transformation-centric advisory: deploying AI-first diligence platforms to accelerate M&A and carve-out execution; creating new revenues streams leveraging AI, to turn traditional businesses into data enabled businesses, developing data and analytics solutions for firms to sell to their clients; and delivering benchmarking and performance optimization tools. Emerging service models, such as subscription-based transformation programs, finance managed services embedded with predictive analytics, strategic workforce planning.

- Audit and Tax - While audit and tax remain foundational pillars of accounting firms, driving recurring revenue and ensuring regulatory compliance, their delivery models are undergoing rapid evolution. These businesses face downward pressure on fees, and many firms are seeing their margins being squeezed. Many firms have or are investing heavily in automation, process optimization, and offshoring and/or nearshoring delivery centers to enhance efficiency and improve margins. Yet these improvements, while

necessary, are no longer sufficient. Audit and tax are increasingly viewed as commoditized services, with limited potential to fuel strategic growth.

The real opportunity lies in unlocking the latent intelligence embedded within these functions shifting from transactional execution to insight-driven enablement. In Audit, this means deploying advanced risk analytics dashboards that provide board-level visibility, integrating real-time anomaly detection to surface emerging threats, and leveraging data to inform strategic decision-making. In Tax, it's about predictive scenario planning powered by AI, automating global compliance workflows, and embedding subscription-based advisory directly into client ERP ecosystems—transforming tax from a reactive obligation into a proactive value lever.

## Client & Product Service Delivery

Just as a symphony succeeds when each musician plays their part in harmony—strings, brass, percussion—firms must orchestrate talent with precision. As service delivery decouples from client engagement, leaders must assign professionals to roles that amplify their strengths and ensure seamless execution.

**For Product or Service delivery** is likely to blend technology, global talent, and flexible engagement models to drive scale, efficiency, and impact. The future of service delivery will be powered by a hybrid talent ecosystem:

- **Tech-Enabled Onshore Professionals** who will serve as program managers and delivery “quarterbacks,” orchestrating cross-functional teams and ensuring quality, accuracy, and contextual relevance.
- **Tech-Enabled Offshore & Nearshore Teams** - These teams will integrate seamlessly with onshore leads and deliver services efficiently and cost-effectively. These teams could be in talent rich regions, like India, South Africa and the Philippines, or cheaper parts of the US.
- **Third-Party Service Providers** - Strategic partnerships with external providers who provide scalable expertise in audit, tax, and accounting. These alliances allow firms to expand capabilities without building internal offshore teams, accelerating delivery while preserving margin.
- **Outsourced & Managed Service Talent** - For managed services firms are leveraging talent with select skills, such as accounting and technology. For fractional offerings, firms are curating pools of on-demand senior part-time professionals enabling flexible delivery of C-suite-level insights and execution without the overhead of full-time staffing.

For **Client Service**, firms will establish a high-impact cohort of senior partners, Strategic Advisors for Growth & Excellence (SAGE) who serve as trusted relationship leaders for priority clients, PE firms, and portfolio companies. These advisors will evolve into strategic generalists, and be proactive, insight-led, and fluent across the firm’s full suite of capabilities. Their mandate will be to unlock enterprise value, drive revenue growth, and orchestrate cross-functional collaboration that delivers measurable impact.

## Evolving Talent Models

The traditional talent pyramid is collapsing. The accounting firms that will succeed will need to architect a tall, narrow, and ruthlessly efficient model built not on layers of junior staff, but on precision, platforms, and performance. High-impact teams will start with AI-powered research and layer in senior expertise to deliver sharper insights, faster, and at a fraction of the cost. Disruptors will not scale headcount, they’ll scale outcomes through automation, modular workflows, and repeatable value creation.

- **Senior Talent** – Moving forward Partners, Principals, and Managing Directors (PPMDs) will not just be seasoned consultants, they are likely to be former operators who have likely run P&Ls, led transformations, and delivered results under pressure. Their credibility will stem from having sat in the client’s seat. The leaders who thrive in this environment will be hybrid thinkers: part strategist, part technologist, part business builder. They won’t just advise on disruption; they will architect it.
- **Mid-Level and Junior Talent** - The next generation of professionals in Audit, Tax, and Advisory will need more than technical expertise. They will need to be digitally fluent, product-minded, and agile collaborators. While they will not be building platforms from scratch, they will



be expected to operate within them, extend their capabilities, and deliver scalable impact. Their core competencies will include navigating AI-powered research tools, configuring low-code automation, interpreting data through visualization platforms, and contributing to modular service offerings. As firms shift from deliverables to embedded solutions, professionals will need to think like consultants and execute like product managers.

Firms that invest in this hybrid talent model, where domain expertise meets tech-enabled execution will unlock speed, margin, and differentiation. Junior professionals will not just support clients, they will co-create, iterate, and deliver insights that are sharper, faster, and seamlessly embedded in client workflows. This is not about replacing expertise but amplifying it through technology.

**experiments.** Firms don't need to overhaul their entire business model overnight. They can design controlled experiments that reduce risk while testing new approaches.

## Why Small Experiments Matter

Running small, structured experiments isn't about incrementalism, it's about **de-risking transformation while building confidence.**

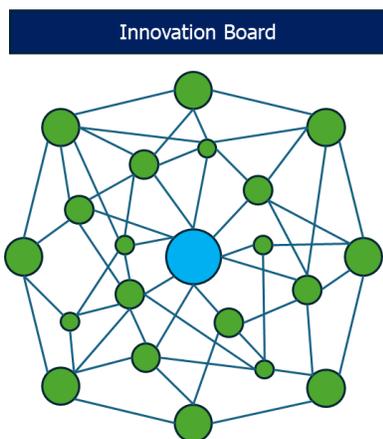
Large-scale change in professional firms often stalls because:

- Leadership structures are consensus-driven and risk-averse.
- Failures at scale are costly and damage credibility.
- Cultural resistance runs deep, and broad change feels threatening.



### AUDIT, TAX, & ADVISORY FIRM

From Structure to Flow: The Growth Partner Network  
Turning experimentation into a repeatable system for growth



- **Innovation Board:** *Strategic Vision & Direction*
- **Coordinating Group:** *Integration & Learning Hub*
- **Executive Teams:** *Innovation in Action*

As experiments scale, the organization evolves from a structured hierarchy to a facilitated network, where learning flows across teams, clients, and technologies. Leadership's role shifts from directing to orchestrating. Innovation becomes everyone's responsibility, connected by purpose, powered by relationships.

Source: Idea Innovate Consulting

## Steps for Audit, Tax and Advisory Firms to Take

One of the biggest barriers to transformation in professional firms is fear (i.e. fear of failure, of diluting the brand, or of disrupting the status quo.) Yet trust, both internally and with clients, is built through action, not rhetoric. The most effective way to start is by **building trust through small**

Small experiments solve for this. They provide a **safe way to test new models** with limited investment, generate **quick wins** that build momentum, and create **proof points** leadership can use to unlock larger commitments. They also allow firms to **learn with clients** in real time, ensuring that innovations are grounded in actual demand rather than abstract strategy.

In other words, experiments are not side projects, they are the engine of trust and change. They allow firms to move beyond paralysis, shift culture from “no” to “what if,” and translate curiosity into measurable outcomes.

## How to Structure Effective Experiments

Effective experimentation requires structure at three levels:

1. **Innovation Board:** A small group of senior leaders that guides direction, prioritizes opportunities, and ensures experiments align with the firm’s long-term strategy. Their role is to provide guardrails, resources, and accountability.
2. **Coordinating Group:** A central hub that connects insights across experiments, tracks progress, and shares learnings. This group ensures that what’s discovered in one pilot can be applied across the firm rather than siloed.
3. **Execution Teams:** Multiple small teams that actually run experiments. These should be multi-generational and cross-service, combining professionals from tax, audit, advisory, and technology. Include younger professionals who bring digital fluency alongside senior leaders who bring client credibility. To signal seriousness, consider adding an **AI agent as a virtual “team member”** to handle research, automation, and data interpretation, showing how technology can integrate seamlessly into daily work.

To make these experiments effective, firms should:

- **Establish KPIs that matter:** Move beyond utilization rates. Focus on outcomes such as client adoption, speed to insight, predictive accuracy, or net new opportunities identified. Judge success by the *value created for the client*, not hours billed.

- **Co-create with clients:** Pick one or two forward-thinking clients willing to test new models. Instead of proposing a polished product, co-develop a **minimum viable service** together. This builds trust and ensures the solution meets a real need.
- **Establish iteration loops:** Use agile principles — short sprints, feedback sessions, and rapid refinement. Keep experiments visible inside the firm so others see progress and gain confidence.

These small-scale tests do two things. First, they give leadership and teams the confidence that change is not only possible but beneficial. Second, they create visible “quick wins”, generate returns to justify future investments and be used to create stories that can be shared internally and externally, making cultural resistance harder to justify.

Curiosity is the spark, but structured experimentation is the engine. By embedding this approach into their DNA, firms can shift from paralysis to progress and move closer to becoming true growth partners.

## Mindset Shift: From Knowledge Economy to Relationship + Systems Economy

At its core, becoming a growth partner is not only about new services or operating models, it is a fundamental change in mindset. Professional firms grew up in the knowledge economy, where value was



tied to expertise and information. But knowledge is now abundant, accelerated by AI and automation. What differentiates firms today is the quality of their relationships with clients, with technology, and within their own teams. Success no longer comes from being the most efficient expert in the room, but from being the partner who can see context, connect patterns, and integrate human judgment with technological capability. This shift demands a broader way of perceiving value: not just transactions or deliverables, but interdependent systems where trust, adaptability, and collaboration generate momentum. Growth partnership is, at its heart, a new economy of relationships.

## Conclusion

Professional services firms stand at a crossroads. One path leads to commoditization, where services are interchangeable and price is the only differentiator. The other leads to becoming true growth partners and irreplaceable allies embedded in clients' futures. The choice is not about technology or even talent. It is about leadership's willingness to step outside the comfort zone, rethink outdated structures, and embrace a model where curiosity, adaptability, and client growth are at the center. In the next decade, firms that thrive will not even be recognized as traditional professional services, they will be operating platforms, growth ecosystems, and AI-augmented advisory hubs. The firms that make this shift will not only survive disruption. They will define the future of the industry.

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