



A&O SHEARMAN



# 10 Case Studies Humans + AI in Professional Service Firms

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# Humans + AI in Professional Service Firms

Professional services have always been based on applying deep expertise to create value for clients. The exponential rise of AI capabilities challenges the assumption that this expertise must be exclusively human. A profound transformation of the professional services landscape is only just beginning.

While some services previously delivered by professionals will become fully automated, the greatest value will lie in Humans + AI structures. The workflows, service delivery, capability development, value co-creation, and knowledge-driven relationships of tomorrow's leading firms will seamlessly integrate the complementary strengths of humans and AI.

This brief compilation of case studies illustrates how a range of professional service firms - many of them recently launched - are effectively implementing Humans + AI processes.

Forthcoming reports will examine practical aspects of building next-generation Humans + AI professional service firms.

## CASE STUDIES:

- **A&O Shearman**
- **Altitude Marketing**
- **Avantia Law**
- **Bain Sage**
- **CASETEAM**
- **KPMG Clara**
- **Monks**
- **NXT Humans**
- **Supergood**
- **Unity Advisors**

# A&O SHEARMAN

## Overview

Formed in 2024 from the merger of **Allen & Overy and Shearman & Sterling**, A&O Shearman is a 3,900-lawyer “Magic-Circle-meets-Wall-Street” firm operating in 50+ offices worldwide. From day one it declared itself AI-led: the firm rolled out generative-AI tools firm-wide, licensing them to clients as products while embedding them in every service line—from capital-markets and M&A to litigation and derivatives.

## Notable Features

A&O Shearman pairs global scale with a **product-led mindset**: it commercializes AI tools externally while using the same stack to cut turnaround times by hours per matter. Dedicated AI leadership, the Fuse innovation hub, and practice-specific “agentic” workflows keep experimentation rapid yet controlled. By integrating senior lawyers’ judgment into every loop, the firm aims to be AI-native without compromising quality or risk management.

## Humans + AI Structures

- **ContractMatrix SaaS.** Generative-AI Word add-in/web app drafts and red-lines contracts against live playbooks—cutting cycle time 50-70 %; deal lawyers set risk parameters and review the heat-mapped mark-ups, while partners clear any flagged clauses before execution.
- **MarginMatrix™ for Derivatives.** Rules-engine + LLM auto-builds margin-election matrices and bespoke collateral clauses, shrinking a three-day task to ≈ 15 minutes; A&O derivatives teams maintain the regulatory logic, spot-check edge cases and provide final sign-off.
- **Fuse Co-development Lab.** Through its in-house accelerator, cohorts of AI start-ups (now on Cohort 7) pair with partners to prototype tools that are piloted on live matters within weeks—turning lawyers into product co-designers.
- **AI Risk & Red-Team Unit.** A cross-practice governance board tracks hallucination rates, bias and data-leak risk; outputs must pass a dynamic “trust-score” threshold before they can be released to clients.



## Overview

Altitude Marketing is a U.S.-based B2B agency that serves life-sciences, industrial and technology clients. In early 2024 it repositioned itself as an **"AI-powered B2B marketing agency"**, promising faster campaign execution, richer attribution and higher ROI by weaving generative-AI and automation into every service—from demand-gen and content to web builds and brand refreshes.

## Notable Features

Altitude pairs a full-funnel B2B offering with a **product-like AI operating layer**. By automating lead management, surfacing deep buyer insights and speeding up content cycles, it claims to deliver more marketing output per dollar than traditional agencies—while maintaining the creative nuance that complex science & manufacturing clients demand. Its transparent blog series and client-facing "AI Marketing FAQs" reinforce thought-leadership and demystify the tech for skeptical CMOs.

## Humans + AI Structures

- **Integrated AI Stack.** Day-to-day work rides on a secure SaaS toolkit—ChatGPT-4, Jasper, Zapier and custom Python micro-services—plugged into HubSpot, Salesforce and ActiveCampaign. This removes manual "busy work" and lets strategists focus on high-leverage thinking.
- **Predictive & Conversational Data Analysis.** Machine-learning models "converse" with multi-gig data sets to reveal buyer patterns, fine-tune media flighting and optimise channel mix in near-real-time.
- **Generative-Content Co-Pilot.** Writers use ChatGPT-4 and Jasper to draft highly technical articles, white-papers and ads—cutting creation time by ~30 %, then refining tone and accuracy by hand.
- **Required Human Sign-off.** Every AI output is reviewed by senior strategists, designers or writers to ensure brand alignment, factual accuracy and compliance with sector regulations.





# AVANTIA

## Overview

Founded circa 2019, Avantia Law is a regulated firm hyper-focused on delivering specialized legal services to global asset managers and private equity clients. Operating from London and New York across the US, EMEA, and APAC regions, it exclusively targets high-volume, process-intensive work in contracts (NDAs, etc.), transaction compliance (KYC/AML), and LP transfers within the asset management sector.

## Notable Features

Avantia's explicit positioning is as a fundamentally tech-driven entity, underscored by dedicated C-suite AI/ML leadership (VP AI, ex-BlackRock ML CTO) and a strategic vision to become an "AI-led, product-led" firm rather than merely a law firm using technology. This tech-centric approach is deeply intertwined with its radical specialization; the narrow focus on specific asset management workflows strategically enables the development and refinement of its bespoke AI engine, 'Ava', fueled by unique, concentrated datasets gathered from its specialized operations.

## Humans + AI Structures

- **Proprietary AI Engine:** At its core is 'Ava', an AI agent platform developed entirely in-house and trained on Avantia's extensive internal datasets specific to its narrow service lines (e.g., processing nearly a million documents, including 55,000 NDAs).
- **Workflow Integration:** Ava integrates via standard tools like Microsoft Office, functioning as an AI "co-pilot" to automate routine tasks and accelerate legal workflows based on client playbooks.
- **Mandatory Human Validation:** A critical safeguard requires that all outputs generated by Ava must be reviewed and validated by Avantia's senior lawyers before completion or delivery.



# BAIN & COMPANY Sage

## Overview

Sage is Bain & Company's proprietary **GPT-4-powered knowledge-agent platform**, unveiled in 2023 and now in use across the firm's ~18,500 consultants and experts on six continents. It instantly synthesises Bain's vast proprietary research, case work, and sector datasets, letting teams surface benchmark data, draft analyses, and translate insights in seconds. Bain positions Sage as proof-point that elite human consulting can be **AI-led without sacrificing judgement—accelerating delivery while showcasing the firm's OpenAI alliance to clients.**

## Notable Features

Bain couples global scale with a product-led mindset: Sage is one of 12 generative-AI tools rolling out firm-wide, and selected modules (e.g., marketing-copy co-pilots) are being productised for major clients such as Coca-Cola. The platform underpins Bain's goal of having tech- and AI-enabled work drive >50 % of revenue by 2027, while its "human-in-the-loop" model preserves premium advisory margins and client trust—illustrating how a top-tier strategy house can become genuinely **AI-native** without abandoning bespoke, senior-led consulting.

## Humans + AI Structures

- **Proprietary GPT-4 Engine.** Built with OpenAI under an exclusive strategic partnership, Sage runs on secure Azure infrastructure and fine-tunes prompts on Bain's curated knowledge base, returning cited answers, drafts, and code snippets.
- **Embedded Workflow Integration:** Sage appears inside Bain's standard tool-chain (MS Office, Teams, Tableau, Jira). Consultants invoke it to draft slides, generate interview guides, or compare KPIs, then push results straight into client deliverables.
- **Mandatory Human Validation & Governance:** Every Sage output is reviewed by case-team members; an internal AI Governance Board sets guard-rails on data privacy, hallucination risk, and model fine-tuning before client use.



## Overview

Launched in **December 2024**, CASETEAM positions itself as the world's first **genAI-native**, hybrid-first management-consulting firm. Headquartered in Silicon Valley but organised as a borderless network, it promises top-tier problem-solving for business, government and nonprofit clients at a superior return on invested fees (ROIF). Its differentiator is **CASETEAM Prism**, a proprietary genAI suite that accelerates every phase of the consulting lifecycle—from scoping and research to option-generation and deliverable drafting.

## Notable Features

CASETEAM is a clean-sheet professional-services model: no legacy billable-hour pyramid, but outcome-priced engagements powered by a proprietary AI engine. By embedding AI agents not only in delivery but also in **recruiting (COLINT), knowledge management and pricing**, it showcases how a strategy boutique can be truly **AI-native yet human-led**—offering clients faster cycles, richer insight, and a transparent metric (ROIF) to prove impact.

## Humans + AI Structures

- **Prism Problem-Solving Suite.** A secure, Azure-hosted stack of large-language-model agents fine-tuned on CASETEAM's frameworks and sector datasets; generates analyses, datapacks and slide drafts in minutes.
- **GenAlyst™ Agents.** Named AI co-workers (e.g., Casey, Cate, Saras) join every project team to run rapid research, scenario modelling and synthesis while human consultants steer judgment and client dialogue.
- **COLINT™ Talent Model.** First-of-its-kind Collaborative-Intelligence Case Interview where candidates solve live cases with a GenAlyst agent—training and vetting new hires in human-AI collaboration from day one.
- **Mandatory Human Stewardship.** Every Prism or GenAlyst output is reviewed by consultants; an internal AI-governance board sets guard-rails on data security, hallucination risk and client confidentiality.





Clara

## Overview

KPMG Clara is the Big-Four network's cloud-native **smart-audit platform**, underpinning engagements for ≈95,000 audit professionals across 145 countries. Introduced in 2019 and relaunched with a full generative-AI layer in **April 2025**, Clara aims to deliver deeper risk insights, continuous assurance and a more transparent client experience—while keeping human auditor judgment at the centre.

## Notable Features

Clara converts a traditionally seasonal, sample-based audit into a **near-continuous, data-rich process**: AI screens 100 % of transactions while humans focus on complex judgments and stakeholder dialogue. KPMG calls it the firm's **largest single tech** investment and a prototype for “people-powered, AI-enabled” assurance—showing how a global profession can scale quality and insight without scaling head-count.

## Humans + AI Structures

- **LLM-powered Audit Chat & Agent Suite.** Built on Azure OpenAI, “Audit Chat” answers technical queries, drafts work-papers and explains standards; a new cohort of AI agents now automates disclosure checklists, substantive procedures and tie-outs, surfacing exceptions for auditor review.
- **MindBridge Anomaly-Detection Engine.** Journal-entry analytics from MindBridge run inside Clara, flagging unusual transactions and control breakdowns; auditors explore drill-downs and decide on follow-up testing.
- **Clara Workflow & Collaboration Portal.** A secure client interface gives real-time visibility into PBC requests, analytics dashboards and status, streamlining evidence exchange and reducing email churn.
- **Global AI Governance & Training.** A cross-member-firm board sets model-risk controls, privacy rules and prompt libraries; every auditor must complete Clara-AI accreditation before using advanced features.



# .monks

## Overview

Digital-first agency **Monks** (formerly Media.Monks) counts ~9,000 staff in 33 countries and delivers creative, content and commerce for global brands. In **January 2024** it launched **Monks.Flow**, an AI-centric managed service and soon after earned Adweek's inaugural **AI Agency of the Year** accolade. By July 2024 the firm restructured all marketing- and tech-services lines around this platform, describing itself as "AI-powered at every touch-point."

## Notable Features

Monks treats **AI as the agency operating layer**: every deliverable is born inside Monks.Flow, iterated through generative tool-chains and finished by senior talent. The platform's blend of automation (speed), multimodal generation (creative range) and human stewardship (brand nuance) lets the firm ship large-scale, multi-market campaigns in days rather than weeks—positioning Monks as proof that a global creative network can be genuinely AI-native yet human-led.

## Humans + AI Structures

- **Monks.Flow Intelligent Workflow.** A cloud stack of 15+ apps that plug gen-AI, analytical-AI and automation into research, concepting, localisation and performance reporting—freeing strategists and creatives to focus on insight and craft.
- **Generative Production Pipeline.** For campaigns such as HP's Back-to-School spots, Monks combines Stable Diffusion XL, DreamBooth and ControlNet to generate style-consistent video frames, then human artists refine color, motion and compositing.
- **Live Multimodal Broadcast Engine.** A Twelve Labs-powered system understands video streams "like a human," enabling on-the-fly object detection, remixing and hyper-personalised cuts for VR/AR, social and streaming.
- **AI Audience & Insight Hub.** LLM agents mine brand, social and CRM data to surface buyer personas and channel white-spaces; planners interrogate the models in natural language before locking media strategy.



**NXT HUMANS**  
BUSINESS BOOSTED.

## Overview

**NXT Humans** is an AI-native advisory and creative agency launched in **August 2024** and headquartered in Philadelphia. The boutique (≈10 consultants, designers and engineers) helps mid-market and enterprise clients translate growth, CX and productivity problems into generative-AI and agent solutions—positioning itself as the bridge between “strategy houses that stop at slideware and software studios that lack boardroom fluency.” Recent work spans a “synthetic-customer” simulator for a U.S. bank, an agentic knowledge hub for a life-sciences firm and an AI-enabled service-design program delivered with partner Think Company.

## Notable Features

NXT Humans operates on **outcome-priced “growth sprints”** rather than billable hours, delivers agent prototypes that clients can own, and openly publishes playbooks to demystify AI for sceptical executives. Its lean footprint and productised tool-chain illustrate how a micro-boutique can punch above its weight—combining **human strategic insight with a reusable AI core** to out-iterate far larger competitors.

## Humans + AI Structures

- **GenAI Co-Lab platform.** A secured Azure workspace that houses fine-tuned LLMs, proprietary CX datasets and reusable prompt libraries; every engagement team spawns a dedicated Co-Lab instance to co-create analyses, concept notes and prototypes with clients in real time.
- **Synthetic-Customer Simulator.** Multi-agent environment that generates thousands of persona-level journeys and “what-if” behaviours; consultants interrogate results to optimise funnels, messaging and service blueprints.
- **Agent Foundry.** A two-week build sprint in which designers, data scientists and domain leads assemble client-specific GPT agents using retrieval-augmented generation and guard-rails; humans then stress-test outputs before go-live.
- **Engagement OS.** Notion- and Miro-based workspace where an LLM auto-summarises workshops, extracts decisions and updates OKRs; senior consultants review and push updates to stakeholders.



# SUPERGOOD

## Overview

**Supergood** is an AI-native, full-service creative agency launched in February 2025. Starting with ~45 staff across New York, Chicago and San Francisco (76 % from under-represented backgrounds), the shop promises campaign work that is **“2× faster and 2× more effective”** than legacy agencies by fusing senior talent with a patent-pending AI platform called **Supercharger**. Early clients include U.S. Bank, Cinemark and Zipcar.

## Notable Features

Supergood’s model treats AI as the **operating layer of the agency**, not a department: every deliverable begins and ends in Supercharger, with humans adding strategic framing, brand voice and creative nuance. By publishing its stack and offering a free Strategy Engine to marketers, the firm positions itself as both practitioner and thought-leader—illustrating how a mid-size shop can deliver HoldCo-level output while running on a lean, data-driven, human-plus-AI engine.

## Humans + AI Structures

- **Supercharger Platform.** A modular, patent-pending stack (Strategy Engine, Audience Maker, Concept Lab) that pulls enterprise-grade data into fine-tuned LLMs to surface insights, draft briefs and generate creative variants in minutes.
- **AI Audience Simulation.** Consultants chat with synthetic customer cohorts built from first-party and market datasets to pressure-test positioning, headlines and media mix before production.
- **Real-time Co-Creation Sessions.** “SuperSessions” drop brand teams and Supergood creatives into a secure Azure workspace where LLM agents iterate copy, layouts and storyboards live; strategists steer, edit and lock outputs.
- **Generative Production Pipeline.** Integrated tools (ElevenLabs voice, Spiral AI video, Adobe Enhance, etc.) let art directors spin prototypes that editors and directors refine—compressing post-production cycles.



### Overview

Launched in **April 2025**, **Unity Advisory** is a Private Equity-backed challenger to the Big Four created by former EY-UK chair **Steve Varley** and ex-PwC COO **Marissa Thomas**. Warburg Pincus has committed US \$300 million to fund a “clean-sheet” advisory house that offers **tax, complex M&A and tech-transformation work—but no audit**—aiming squarely at mid-market, PE-owned companies that want top-tier advice without legacy overhead or conflict risk. Varley calls the proposition “super client-centric, really low cost and **AI-led rather than based on legacy infrastructure.**”

### Notable Features

By dropping audit, Unity avoids conflict rules and can embed its **AI platform in every service line** without regulatory grey areas. The founders bet that a lean workforce—augmented by LLM agents and governed by a lightweight AI-risk board—can deliver Big-Four-grade insight at 30-40 % lower client cost while giving senior talent equity upside. If the model scales, Unity may prove that **human expertise + a proprietary AI core + PE capital** can crack open a market long dominated by partnership pyramids.

### Humans + AI Structures

- **UnityAI Core.** Azure-hosted LLM stack fine-tuned on IFRS/UK-GAAP, tax statutes and 20+ years of partner work-papers; drafts memos, diligence reports and board papers in minutes, which consultants then refine for nuance and tone.
- **Deal-Lab Agents.** Scenario-model-building bots generate carve-out economics, synergy maps and ESG impact scores overnight, giving human deal teams a head-start on negotiations.
- **Delivery OS.** Slack / Teams plug-ins auto-summarise meetings, track action items and fill time-and-expense data, letting senior advisors stay billable while admin costs stay <10 % of fees.
- **Adaptive Fee Engine.** AI estimates value-at-stake, helping Unity price engagements on outcomes or equity upsides rather than billable hours, with dashboards that reconcile results against promises.



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