

**REVEALED**

# **WHO'S WINNING THE AI RACE?**

# WANT A SNEAK PEEK AT YOUR COMPETITORS' AI HOMEWORK?

**We're spilling the tea on strategies, spends, and solutions they don't want you to know.**

If you've already read [Teamwork.com](#)'s new report **The Sprint to AI** you'll know that client service firms are excited about AI. But the sheer speed of change — and the barrage of hype about it — is overwhelming, making it tricky to know where to start (yes, they're em dashes, and no, this wasn't written by AI).

If you're worried about falling behind, this guide is for you. We're serving up the inside scoop on your competitors' AI plans, plus a handy cheat sheet to get a head start with AI.

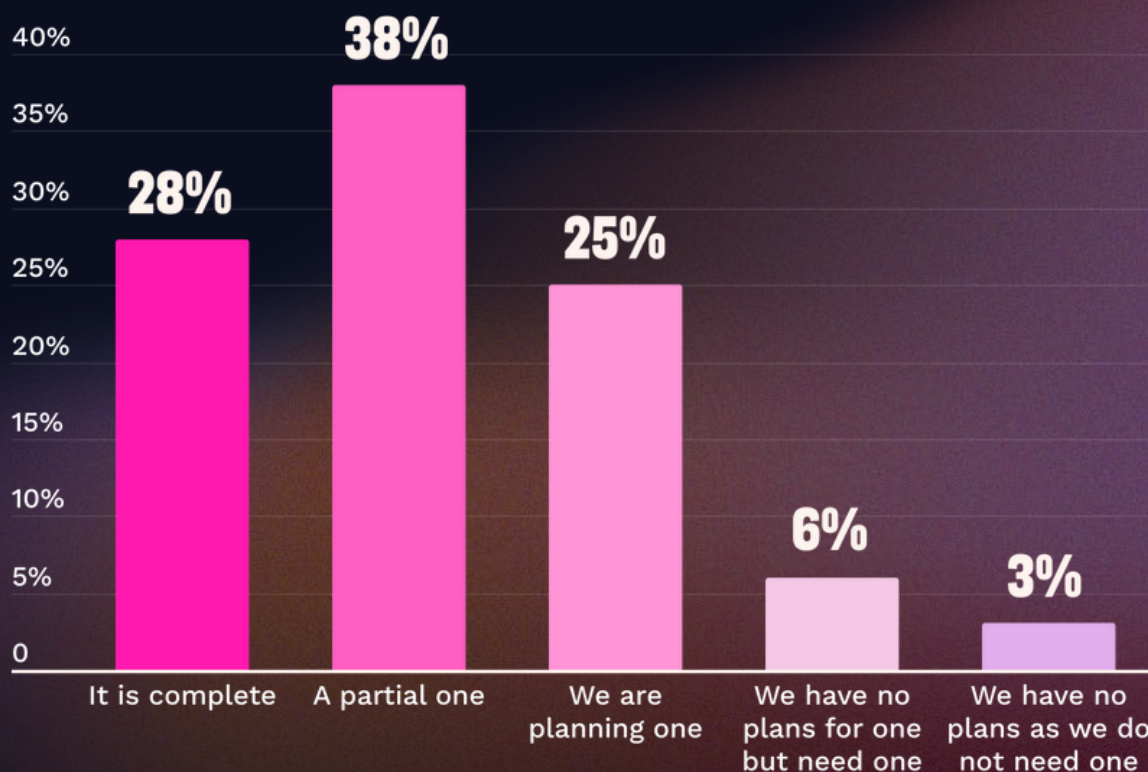




# ARE MY COMPETITORS LEAVING ME IN THE (AI-GENERATED) DUST?

In every digital breakthrough there are early adopters, and those late to the game. In the AI goldrush, most people (38%) are breaking ground by starting with some form of AI strategy, while others (25%) have it on their to-do list.

## Do you have an AI strategy?



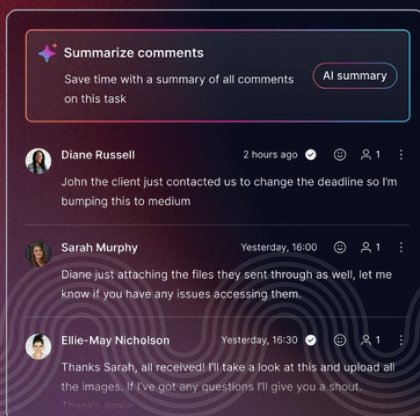
A surprising number (28%) say they have a complete AI strategy already. But can you *really* complete an AI strategy when the technology is still in its infancy, and evolving faster than ChatGPT can reply?

And what do you do if you're in the 6% who haven't yet got stuck in? Now is the time to get moving. You don't have to go gung-ho; in fact, the client service firms winning the AI race aren't necessarily using it everywhere. They're using it for quick and practical wins, in resource planning, forecasting, detecting risks, decision-making, and client communication. Small steps are better than none, and we've got a few below to help.



28%

say they have a complete AI strategy already



AI Project Wizard

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**Meet the AI tools built for client work.**

AI Project Wizard, AI Smart Scheduler, AI Forecaster

**Watch a Demo**

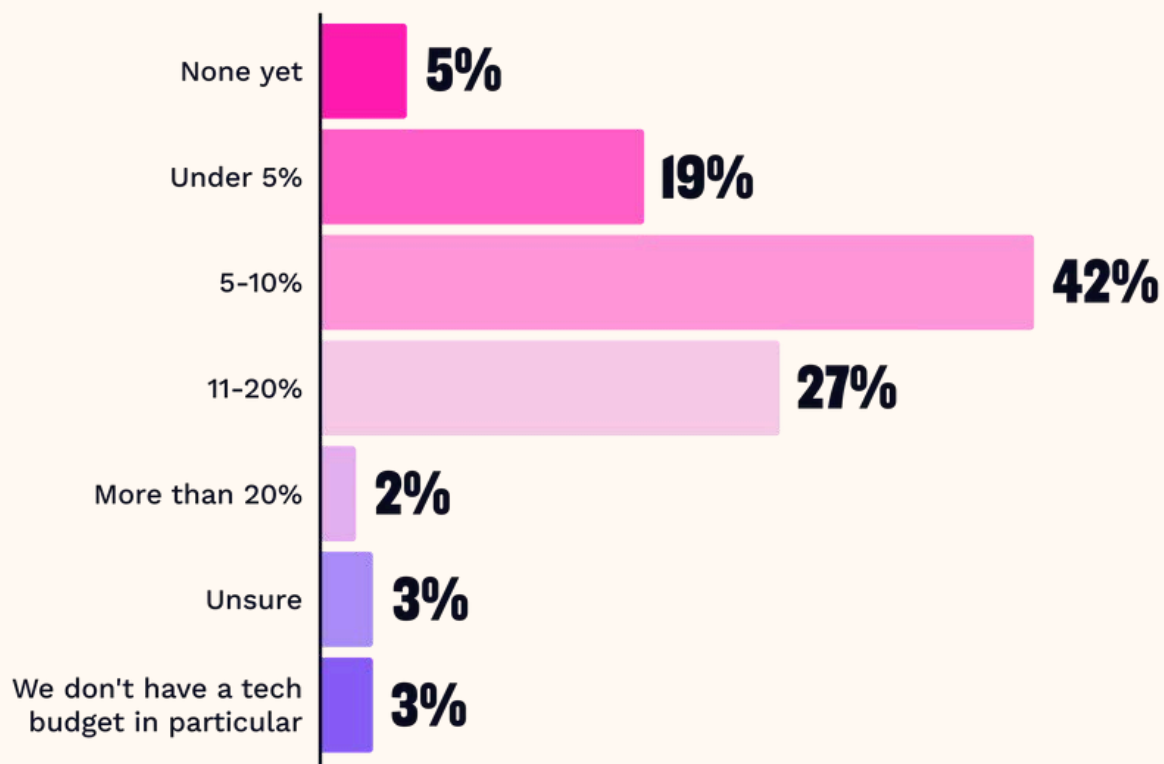


# WHAT ARE PEOPLE SPENDING ON AI TOOLS?

Which AI investments are actually worth it? It's possibly still too early to tell. So when it comes to spend, typically people are putting aside 5-10% of their tech budget for AI tools. This shows cautious optimism, laced with some hesitancy to go all in before fully understanding how to use it.

That's what the majority are doing. And the others? Some are betting bigger, and spending more to get premium AI products over limited freeware. In fact, there's actually *more* companies spending *up to 20%* than those spending *less than 5%* of their tech budget.

## AI spend is growing (cautiously)

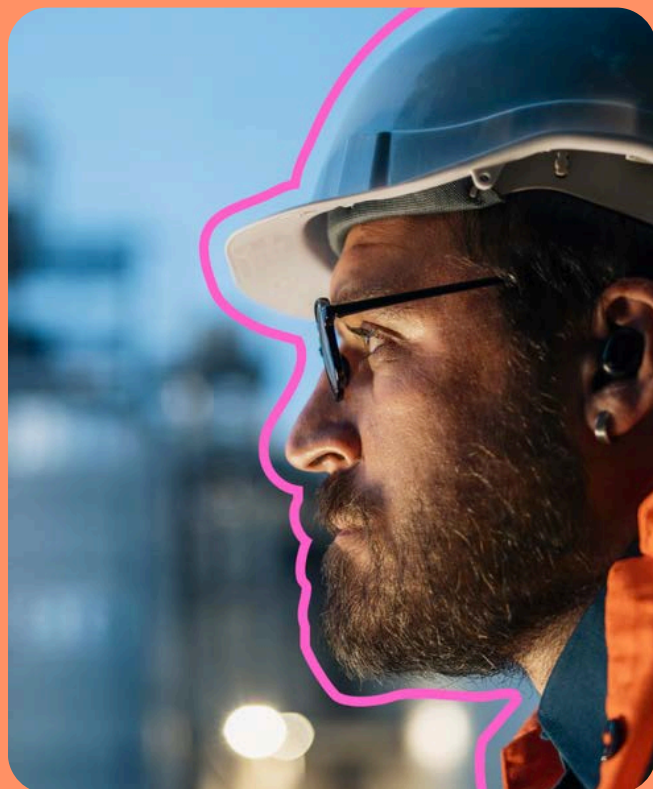


# BENCHMARKING AI WINS, SAFEGUARDING AI FAILS

AI is powerful. But with great power comes great responsibility, right? Our findings show that most businesses are building in at least some form of guardrails for AI use.

When it comes to using AI for decision-making, there's more to consider. In **The Client Work Report**, we explore in detail why most firms' biggest AI worries aren't about the tech itself, but about the data behind it — accuracy, reporting, and usage.

A reminder for those at the back: that's because fragmented tools and bloated tech stacks create fragmented data. And while AI can do amazing things, it can't fix software gaps (yet) — leading to missed opportunities and lost revenue.



48%



have review processes

47%



use automated monitoring

47%



keep humans in the loop





And how do you know if your AI progress is working? Many client service businesses are starting to implement benchmarking processes — whether that's internal KPIs (like hours saved, forecasting accuracy, or utilization rates) or more formal processes to measure the wins. If you're not measuring it at all, you're flying blind.

“

**How can it be so smart but also so dumb? How do I prompt it to get the highest level of intelligent output?**

40%



have a formal  
benchmarking metric

35%



use internal KPIs



# THE INSIDE TRACK FROM TEAMWORK.COM CUSTOMERS

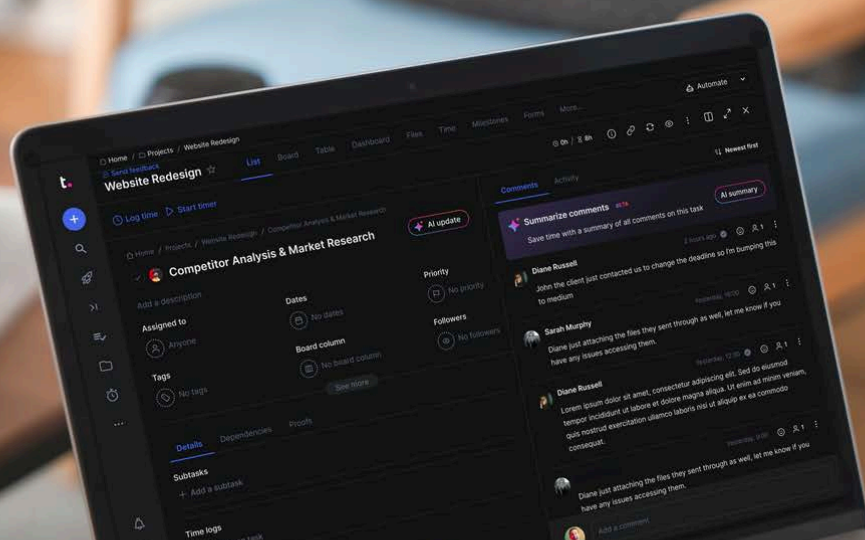
At Teamwork.com we speak to client-facing teams every day. What we're hearing from them is that their role has changed, but they don't yet know into what. We explore this in more detail in **The Client Work Report: The Sprint to AI**.

The excitement about AI is real, but so are the fears: job security, ethics, data safety, and simply not knowing how to use AI with confidence. Many describe this stage as a “Wild West” — pockets of innovation alongside patchy adoption, with teams either leaning too heavily on AI or avoiding it completely.

58%

agree their role is changing,  
but they don't know into what

Size matters, too. Smaller firms often move faster, with fewer barriers to adoption. Larger ones hit cultural and technical roadblocks, or stumble when adoption happens without guardrails. As one leader put it, “Blind adoption is just as risky as no adoption at all.” The takeaway? Success isn't about speed or scale — it's about intention. The firms getting it right are embedding AI with structure, balance, and trust.



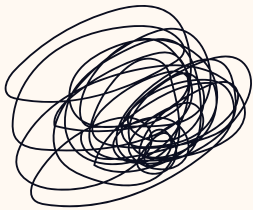
Ready for the future of  
AI-Powered Client Work?

Watch a Demo



# YOUR NO-NONSENSE AI ADOPTION CHEAT SHEET

No AI action plan? No sweat — we've done the hard work for you. Here's how to reduce tool sprawl, and build a leaner, smarter stack.



## 1.

### Map the mess (and the magic)

- **Name the pain:** List the repetitive, time-sucking tasks your team hates (status reports, rescheduling, chasing updates). Then group them into patterns that show the real impact (double bookings, wasted billable time, delayed delivery).
- **Stack check:** Next, do a quick tool audit. Got two apps doing the same job, or data scattered in ten places? Bingo, you've just spotted tech stack bloat.
- **Clean & consolidate:** Tidy up messy data, cut duplicates, and choose one reliable source of truth.
- **Evaluate client and business expectations:** Ask where clients actually want AI to make things better — faster reporting, sharper insights, clearer comms — plus the things that matter to you, like billable utilization rates.
- **Start small:** Pick 1–2 quick wins where AI can replace or enhance tools you already use.

- **Get stuck in:** AI won't replace your team, but people who know how to use it might. Give your people time to test AI tools, share learnings, and figure out what's useful vs. what's just hype.
- **Train like you mean it:** Seek out tailored learning & focus the team. Project managers should be streamlining processes. Client-facing folks should be practicing AI-assisted comms that don't sound like robots wrote them. Consider starting a shared list of prompts that get results.
- **Lead the Charge:** Don't just drop AI on your team and hope for the best. Explain the why, roll it out in phases, and pick champions to keep momentum alive.
- **Prove It in Practice:** Skip the theory. Show real workflows where AI replaces two or more clunky tools. When people see it working, they'll believe it.

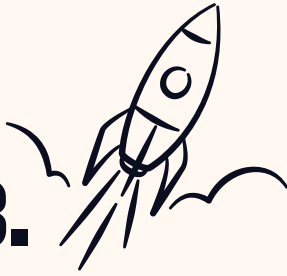
## 2.

### Upskill as your pipe depends on it



3.

### Roll it out (without any hiccups)

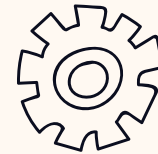


- **Pick a core hub:** Anchor on one central platform to reduce sprawl.
- **Pilot with purpose:** Start small, but don't just dabble. Choose AI that drives real outcomes like utilization, billable time, and delivery predictability. [Teamwork.com](https://www.teamwork.com)'s AI Project Wizard is a great place to get started.
- **Measure what matters:** Track wins that count — time saved, errors reduced, faster client responses, tools eliminated.
- **Set smart guardrails:** Keep a human in the loop for anything client-facing. AI drafts, people decide.

- **Map workflows:** Show where AI fits naturally into your project lifecycle (e.g., risk analysis, reporting).
- **Automate the boring stuff:** Chain processes from deal → project → resource → invoice, so the admin takes care of itself.
- **Connect tools:** Integrate AI into your existing PM platform via native features, automation, or APIs to avoid “yet another app.”
- **Write the rules:** Create playbooks that standardize and show how to use AI — and which old tools to ditch.

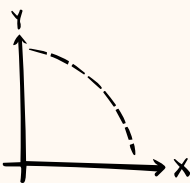
4.

### Integrate, automate, scale



5.

### Measure & tweak (without stack creep)



- **Listen up:** Get feedback from teams and clients on what's working — and what's making life harder. Bonus points for leaning on AI and automating this too.
- **Track real wins:** Look at before-and-after metrics defined in Step 3: time saved, costs cut, fewer tools, faster delivery.
- **Tweak the rules:** Update your AI guidelines as tech evolves. If a tool's not pulling its weight, retire it.
- **Expand responsibly:** Roll out successful use cases across teams, but enforce a “one in, one out” policy for new tools.