

THE STATE OF UK PROFESSIONAL SERVICES 2026





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Introduction - A sector at a crossroads

01

The past few years haven't been the easiest for UK professional service firms. Numerous factors, such as Brexit and the war in Ukraine, have contributed to an uncertain economy. Regulations around data protection and money laundering have become more complex, meaning professional services need to spend more time checking they're operating on the right side of the law.

In addition, businesses must work harder than ever to stand out in a crowded market while meeting rising client expectations. Many firms have been focusing on stability, trimming costs, and protecting their existing client base.

Interestingly, things are starting to change, with more organisations expecting to grow over the next year. However, there also appears to be a paradox, as leaders seem to lack confidence in their actual ability to generate new revenue consistently. Ambition is soaring, yet firms aren't following through at quite the same pace.

This white paper draws on original research commissioned by Capsule CRM and carried out by Sapio Research in August 2025. The survey captured the views of 250 CRM decision-makers in UK professional service firms, each established for at least three years.

Their responses reveal a sector that's full of enthusiasm but grappling with challenges around growth, client management, and technology — a crossroads that will define its path in 2026.

In the chapters ahead, we'll explore what's driving this gap

between ambition and execution. We'll look at the growth outlook for professional services, how firms are balancing winning and retaining clients, and what's holding them back.

We'll also examine the role technology plays, both as a solution and as a source of frustration, and consider the impact this has on the people behind your business.

Finally, we'll share a practical playbook to help firms turn optimism into confident, sustainable growth in 2026 and beyond.

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The growth outlook

02

After a difficult few years, UK professional service firms are starting to feel optimistic again. Nearly two-thirds (63%) expect their business to grow in the next 12 months, a significant increase over the 54% who said the same a year ago. Optimism is widespread across the sector and reflects a renewed appetite to move forward.

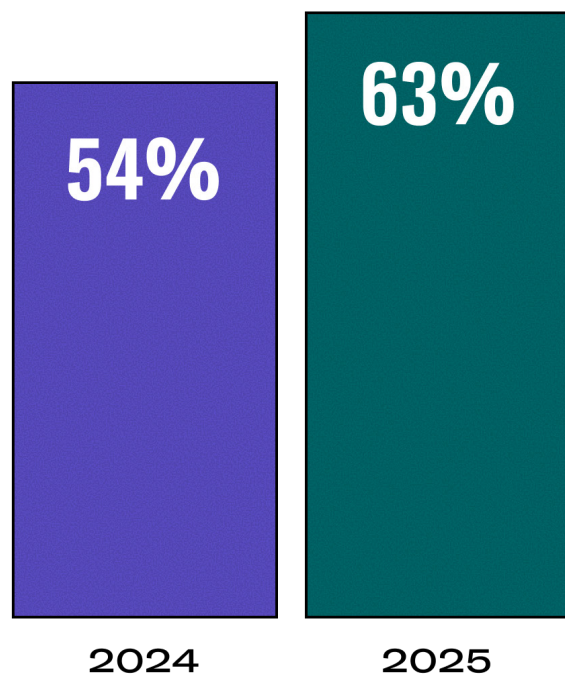


Figure 1: Percentage of professional service firms who expect their business to grow in the next 12 months

However, optimism isn't the same as confidence. When asked how certain they were about their ability to generate new revenue consistently, only 27% of leaders said they were very confident. In other words, most firms are hopeful about growth but aren't so sure about the systems or strategies they have in place to deliver it.

"A lot of small business owners start out keeping everything in their heads, whether it's client information, follow-ups, or processes. While it might feel faster at first, as the business grows, that lack of structure becomes a bottleneck. Without clear systems and documented processes, things start to fall apart. If you want to scale successfully, you have to build the right foundations first, and that includes systems that make growth sustainable rather than stressful."

— **Julia Blake, Director, Blake Consultants Limited**

Confidence also varies significantly depending on who you ask. For example, marketers seem to be the most positive, with 61% expressing strong confidence. At the other end of the scale, consultants are the least confident at just 15%.

"It's no surprise that marketers feel more confident than consultants. They're used to measuring progress in impressions and leads, not always hard revenue. Sales, on the other hand, rely solely on deals. The two disciplines often chase the same growth target but speak completely different languages when it comes to how to get there."

What we're seeing now is a gap between optimism and operational confidence. Marketers might believe the pipeline will come, while salespeople are asking how and when. The most successful small businesses are the ones that bridge that divide."

— Andy Culligan, Co-Founder & CEO, purple path

There also appears to be a correlation between confidence and business size. Larger firms (11-50 employees) feel more capable than their smaller peers, with 36% reporting confidence compared to only 20% among firms with 1-10 employees. Younger firms (3-5 years old) are also significantly more confident (38%) than more established firms of 11+ years (19%).

"Smaller businesses often run on instinct and hustle. While that can take you a long way, you gain confidence from visibility. Larger or more established teams usually have the data, processes, and systems in place to really understand what's working and what's not."

When you're a small outfit, you might be too deep in the day-to-day to step back and measure progress properly. It's not that you lack the ability, but more the infrastructure to turn your efforts into insight. The moment they start building that visibility, confidence tends to follow."

— Steve Ledgerwood, CEO, Capsule CRM

How are firms going about achieving this growth? Encouragingly, 83% are taking at least one step toward growth. Still, the most common actions are monitoring progress (37%) and evaluating strategy (36%). These are important, but realistically, they're more related to maintenance than growth. It's the equivalent of checking the engine rather than stepping on the accelerator. It seems that, despite their confidence, few firms are ready to take meaningful action to grow their pipeline.

"It's encouraging to see so many small businesses keeping an eye on their performance — but watching the numbers isn't the same as moving them. Real growth starts when you turn insight into action. A lot of owners get stuck in that safe zone of reviewing strategy and checking progress because it feels productive. But at some point, you've got to put your foot down and test something new. Growth comes from doing, not just planning."

— Steve Ledgerwood, CEO, Capsule CRM

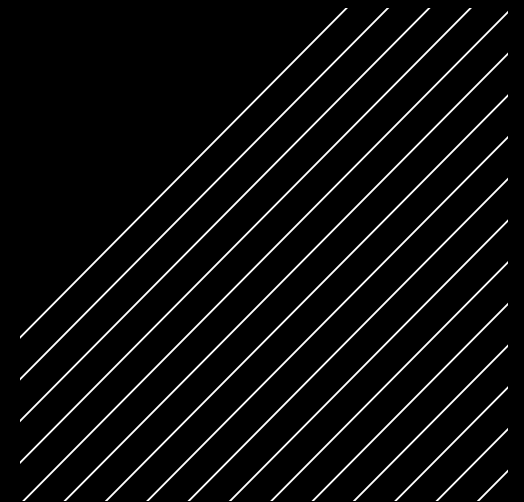
The same pattern appears in how firms generate new business. The majority rely on referrals from existing clients (45%) or posting on social media (44%). Both approaches can be effective and are relatively cheap to implement. However, without the right strategy and infrastructure in place, these methods are difficult to scale and use efficiently. Referrals depend on client goodwill and timing, while social posting can be hit-and-miss without a clear strategy or follow-up process. Far fewer firms invest in higher-impact growth tactics like hosting events (22%) or webinars (18%).

"Smaller businesses often run on instinct and hustle. While that can take you a long way, you gain confidence from visibility. Larger or more established teams usually have the data, processes, and systems in place to really understand what's working and what's not. "



Andy Culligan

Co-Founder & CEO of Purple Path



“Referrals and social posts are fine, but they’re not a growth strategy. They’re a safe place for people who don’t like engaging with strangers. A social media feed or someone else’s recommendation is a way to avoid the uncomfortable part about sales and expanding your business. Furthermore, these activities are usually performed in a mediocre way that yields lower results than desired.”

Social should be a way to stand out, not conform. To build communities you never would have otherwise, where conversations flourish and experiences that people will remember reign supreme. That’s what truly provides growth for your business. Not betting on algorithms or crossing your fingers someone might buy... Real, raw, gritty work that yields results through action.”

— Dale Dupree, Founder & Rebel Leader, The Sales Rebellion

So, what’s the difference between the businesses in maintenance mode and those willing to step out of their comfort zone?

One significant factor was whether or not they had a system in place to take advantage of the more proactive strategies. Firms using CRM software are more likely to run events or use paid advertising because they have a place to capture and follow up on leads. Without this foundation, firms often default to reactive channels, leaving growth to chance rather than design.

“Social should be a way to stand out, not conform. To build communities you never would have otherwise, where conversations flourish and experiences that people will remember reign supreme. That’s what truly provides growth for your business.”



Dale Dupree,
Founder, The Sales Rebellion

The client equation - winning and keeping business

03

For most professional service firms, growth — quite reasonably — starts with trying to win more clients. In fact, 33% of leaders report that attracting new clients is their number one challenge. But when you look more closely at where revenue really comes from, a different story emerges. Almost two-thirds of income (65%) is generated by repeat clients.

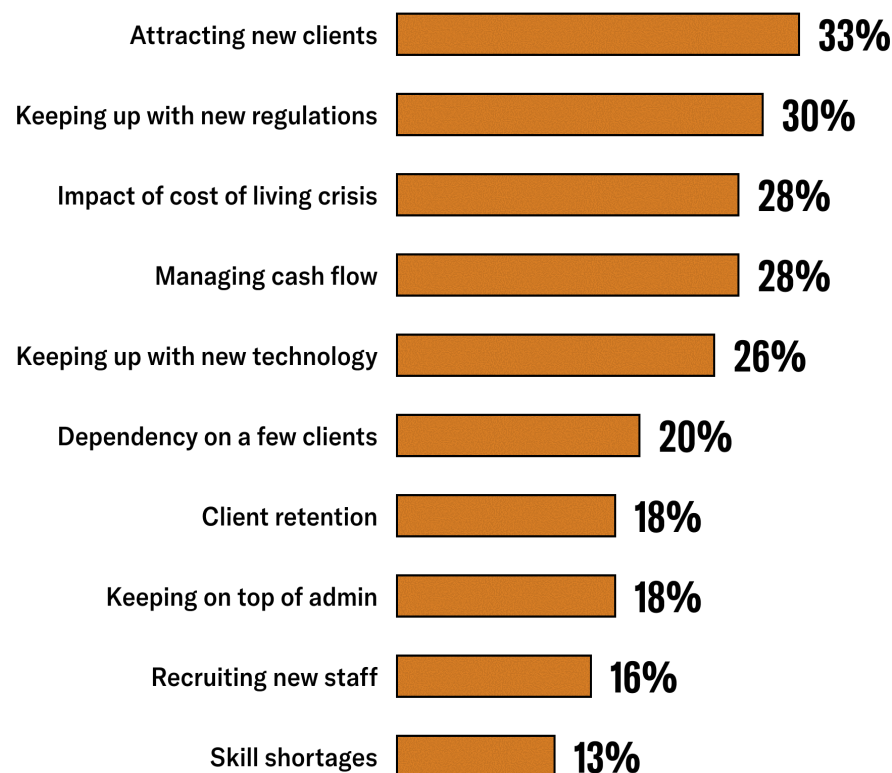


Figure 2: Top challenges faced by businesses

“It’s easy to get caught up chasing new clients, but sustainable growth comes from looking after the ones you already have. Repeat business doesn’t just happen; it’s earned through consistency, trust, and real partnership. The firms that grow steadily are the ones that treat every client like a long-term relationship, not a one-off project.”

— Keith Weir, Customer Success Lead, Capsule CRM

These two sides — acquisition and retention — form the client equation, and firms that get it right will build reliable growth.

For acquisition, standing out in a crowded market (35%), finding quality leads (30%), and converting those leads to clients were considered top challenges. Competition is getting more intense while client expectations continue to rise.

When acquisition feels uncertain, retention may be the safer bet. The majority of revenue already comes from existing clients, and retention strategies are part of most firms’ playbooks. The most common approaches are personalised services (46%) and personalised communication (36%). These are solid foundations, but they only scratch the surface of what’s possible.

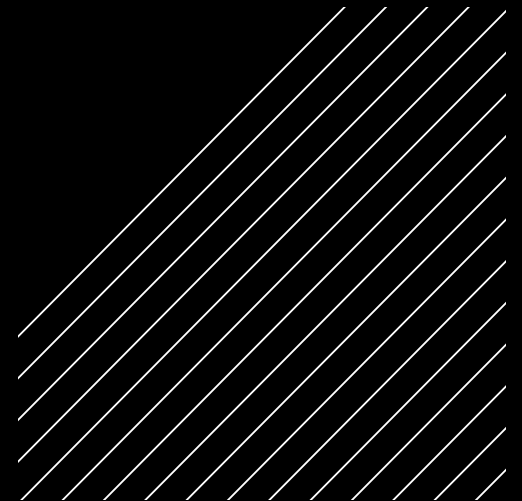
Few companies invest in more structured retention activities such as newsletters, client events, or educational webinars. These approaches can strengthen relationships and also create natural touchpoints for cross-selling and upselling. In a sector where switching costs are low and competitors are plentiful, providing continuous value is crucial to keep clients loyal.

“Cross-selling and upselling aren’t dirty words when they’re rooted in value. If you truly understand a client’s goals, you can spot opportunities to solve more problems for them. That’s how sustainable growth happens, not by chasing more leads, but by deepening the relationships you already have.”



Tom Parker

Founder of The Sales Architect



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— Tom Parker, Founder, The Sales Architect

If firms know retention matters, why aren’t more making it a central growth strategy? Our research points to fragmented client data as a common issue. 58% of firms store information in more than one place, while almost a quarter (23%) still keep some client records on paper. Even among CRM users, data often spills into spreadsheets and inboxes, and even paper-based resources.

The consequences are predictable. When your team isn’t sure where to find the latest information, even the simplest tasks become difficult. Promising leads go cold as follow-ups are forgotten. Small frustrations mount up until the client has had enough. Then, when clients inevitably churn, firms often cite vague reasons such as “the service was no longer required” rather than identifying specific, actionable causes.

The difference between organisations that grow and those that plateau often comes down to visibility. With a single source of truth for client data, firms can see where relationships are strong, where they’re at risk, and what steps to take next. Instead of waiting for churn to happen, they can intervene early with the appropriate actions, whether that’s a simple check-in call or something more specific.

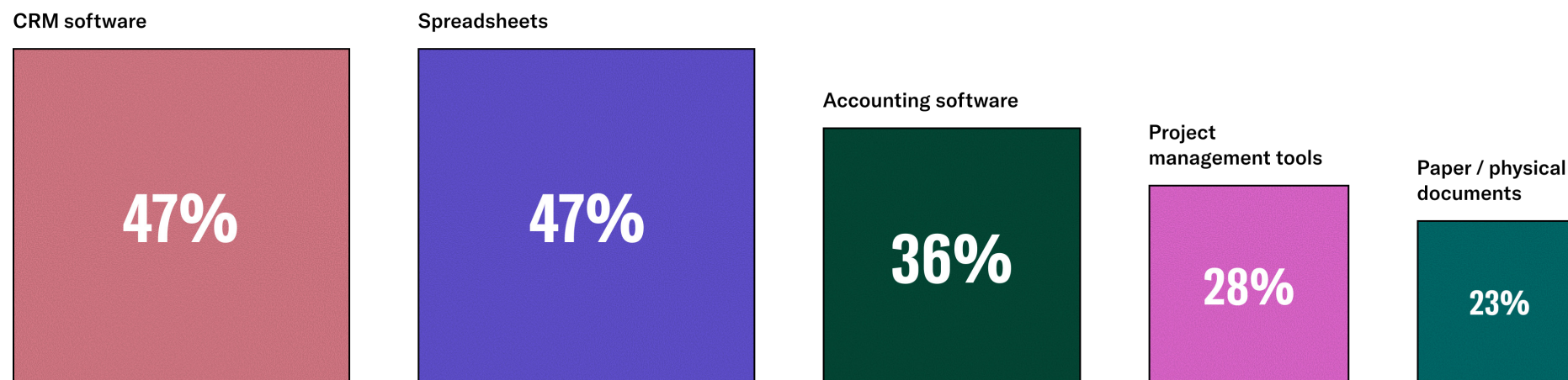


Figure 3: Most popular methods of storing client information

“Having everything stored in one place helps you stop reacting and start leading. Structure gives you space to see what’s really happening, like what clients need attention, which projects are doing well and where things might be slipping. For small businesses, that visibility isn’t just a nice-to-have it’s essential. When your data and processes are organised, you can focus on what really matters: your clients and your growth.”

— **Jaanika Okk, Managing Director, Time Assist Ltd**

This shift from reactive to proactive doesn’t need to be complicated. It starts with centralising client information — who your clients are, what’s important to them, and what your next steps should be. From there, automation can handle routine reminders, freeing staff to focus on delivering value in the moments that matter.

As the research shows, firms that embrace structured processes and supportive technology are better positioned to capture and retain business. In 2026, the winners will be those who stop leaving growth to chance and start designing it into every stage of the client journey.

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Jaanika Okk,
Managing Director, Time Assist Ltd

Delivering for clients - efficiency strains

04

Of course, it doesn't matter how many new clients you acquire or what retention strategies you use if you can't deliver a high-quality service.

Our research shows that delivery remains a key challenge for professional services businesses. The most common obstacle is the client themselves, with client delays cited as a challenge by 38% of respondents. If you're spending too much time sitting around waiting for feedback or approval, these bottlenecks can stall even the best-planned projects and reduce your profits.

Another major obstacle is manual tasks, with 27% of firms say repetitive admin consumes a disproportionate amount of time.

From updating spreadsheets to sending routine reminders, much of this work could be automated or streamlined, yet many businesses continue to rely on outdated, manual processes. Highly skilled professionals often waste valuable hours on work that could be done through basic automation.

“So many small business owners lose hours every week to admin that doesn't move their business forward. It's not that the work isn't important, but their time is so valuable and limited. When you automate the repetitive stuff, you don't just save time, you get headspace. That's when people start focusing on the work that actually grows the business instead of just keeping it running.”

— Jaanika Okk, Managing Director, Time Assist Ltd

As teams grow, so do the complexities of staffing and managing bigger projects. What works in a 5-person practice often breaks down in a 50-person organisation. Allocating resources effectively and keeping everyone aligned becomes increasingly difficult without reliable systems.

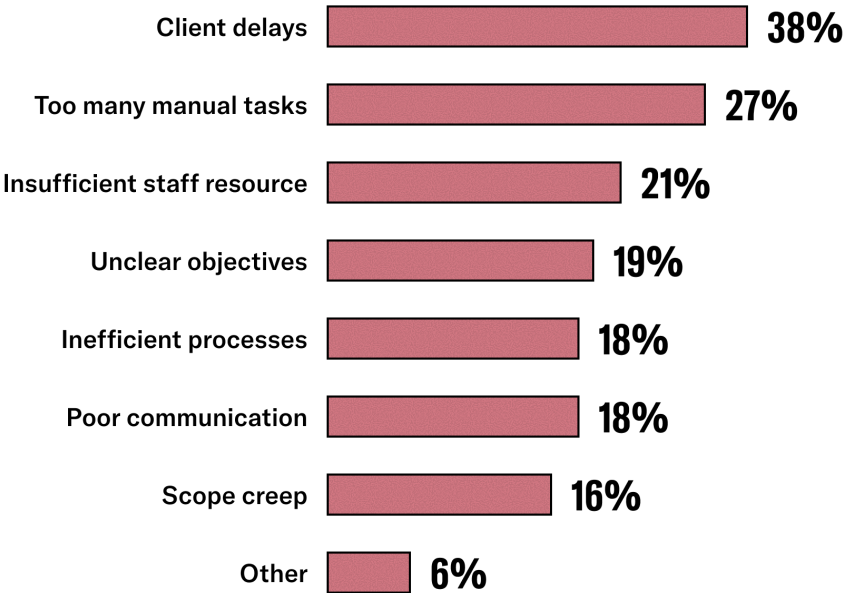


Figure 4: Challenges in delivering work for clients

These roadblocks have a wide impact on businesses and individuals. Operationally, firms experience missed deadlines, duplicated effort, and strained client relationships. Financially, delays and wasted hours mean fewer billable opportunities and reduced revenue. At the human level, inefficiency fuels stress and burnout, with nearly half (46%) of leaders saying that business worries regularly spill into their personal lives.

What's causing these inefficiencies?

In many cases, the underlying problem is fragmented systems. Teams juggle multiple tools for different tasks, such as using their CRM for contact management while managing projects in a separate app. If those systems aren't integrated, information becomes siloed, leading to delays and mistakes. Leaders, meanwhile, lack the visibility to see which projects are progressing smoothly and which are at risk, keeping them constantly on the back foot.

In short, the firms that overcome the challenges around inefficiency will be those that centralise their processes and information. By connecting disparate systems to form one cohesive unit, professional services can focus on the work they do best without stressing over mundane tasks.

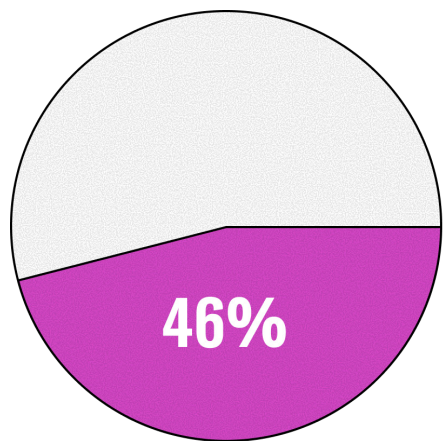


Figure 5: 46% of respondents say thinking about the business regularly intrudes on their personal life

When you automate the repetitive stuff, you don't just save time, you get headspace. That's when people start focusing on the work that actually grows the business instead of just keeping it running."



Jaanika Okk,
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The technology divide

05



As we've seen so far, having the right systems in place can make a large difference to professional services firms. From tracking client relationships to automating repetitive tasks, the right tools promise to help leaders solve that client equation and deliver a great service more efficiently.

It's no surprise, then, that CRM and AI are rated as the two most helpful technologies for business growth. The research shows that organisations that manage to make CRM and AI part of their daily routines tend to feel more confident. They're more organised with their data, more proactive in keeping clients engaged, and quicker to spot opportunities.

For example, the majority of firms (68%) now use a CRM. On the surface, this is encouraging. Most leaders recognise they need a structured way to manage relationships and track opportunities. Salesforce (21%) and HubSpot (17%) are the most popular choices.

Still, simply having a CRM isn't a magic bullet. For many, these CRMs are too complex or too expensive, with more than a third of leaders citing complexity (37%) and cost (36%) as barriers.

Even more striking, CRM users were more likely than non-users to store client data in multiple places. Instead of doing the job they're literally made to do — centralising all your customer data in a single source of truth — CRMs are often used alongside spreadsheets, inboxes, and even paper notes.

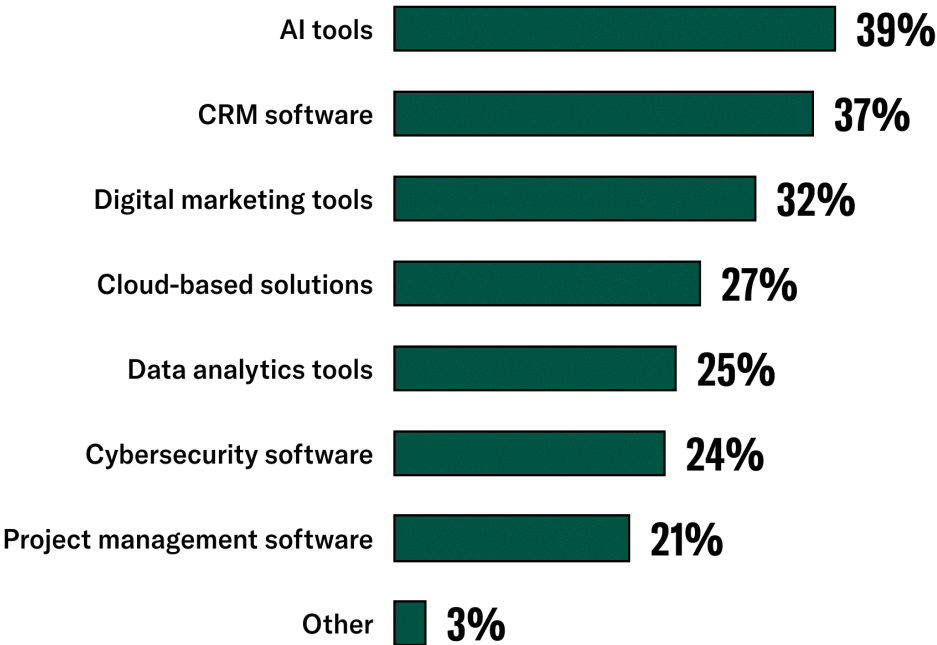


Figure 6: Most helpful technologies

AI tells a similar story. Almost half of firms (44%) are already using AI in some form, and most see its potential for improving efficiency, but firms aren't finding it so easy to implement. A lack of expertise is the biggest hurdle (37%), followed closely by budget limitations (32%).

This means that any AI adoption tends to be poorly thought out, bolted on to processes rather than built into them, which makes it harder for firms to get the most out of it.

“AI isn’t a magic button. The truth is, many small businesses either don’t trust AI at all or expect it to solve every problem overnight. With so many tools out there, it can feel overwhelming, and instead of just choosing one and starting, many give up before they ever see results.

The first step is to slow down and audit your business. Document your workflows - what your business looks like, how a lead comes in, and how you provide your service or product. Then identify where you and your team spend the most time, what manual tasks take up your day, and make sure your data is clean. Once you have that clarity, start small. Pick one tool, like ChatGPT, and use it to automate simple, repetitive tasks or summarise client interactions. Those small wins build confidence and create real, long-term business advantage.”

— Luis Sousa, Co-Founder, The AI Break & Scalit.co

Several factors explain why technology doesn’t always deliver the results you’d expect:

- Unexpected resource requirements. Enterprise-grade platforms are powerful but often need additional training, IT support, and dedicated administrators.
- Tool overload. Firms continually add various tools that often overlap, resulting in duplication and confusion.
- Hard to use. If software isn’t intuitive, staff fall back on spreadsheets or random notes.

- Cost pressures. Cheaper tools may be chosen to cut costs but lack the features or integration needed to be effective.

Instead of just throwing more tech at the problem, firms must be more strategic about the platforms and tools they use. Businesses need software that’s user-friendly, affordable, and integrates with their other tools. With these elements in place, technology can actually deliver on its promise and help organisations work better with less frustration.

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Luis Sousa,
Co-Founder, The AI Break & Scalit.co

The human side of professional services

06



When firms talk about growth, the conversation often revolves around systems and tools. However, the real driver of success is the people who use those systems. Without healthy, focused teams, even the best technology will fall short.

The research highlights this clearly. The strain is particularly acute in consulting and accounting, where client demands can feel relentless. Directors, vice presidents, and C-level leaders are also more likely to find themselves dealing with stress and anxiety over work.

Almost half of respondents (46%) say that business worries regularly intrude on their personal life. A similar number (44%) say they and their teams have had to work late because of time-consuming tasks (jumping to 70% for the C-suite). 44% admit they frequently worry about how to ensure business growth, and 30% say they've even lost sleep over lost clients or missed opportunities.

"Running a business can take a real toll on your health, both mentally and physically. It's hard to switch off when everything feels like it depends on you. The late nights and constant worry are often signs that you're carrying too much on instinct and not enough on insight. When you have clear visibility into your business, it gets easier to separate what actually needs your attention from what just feels urgent. That clarity doesn't just make the business stronger, it gives you a bit of your life back."

— Steve Ledgerwood, CEO, Capsule CRM

Stress and burnout can have devastating effects, both on individual well-being and business performance. After all, it becomes much harder to think strategically and make the right decisions when you're stressed and sleep-deprived. Others in the teams are likely to pick up on the pressure too, leading to a dip in morale and focus.

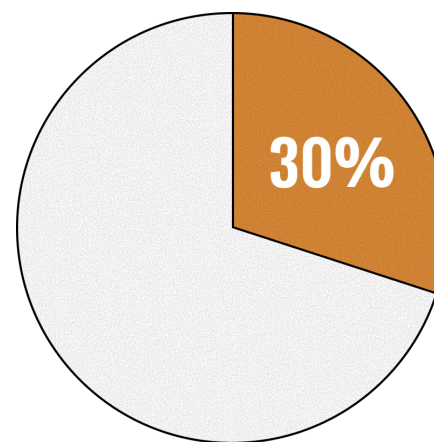


Figure 7: 30% of respondents say they have lost sleep over lost clients and missed opportunities

Business growth and personal well-being are not mutually exclusive. In fact, they depend on each other. People are indeed the lifeblood of any professional firm, but they also need the right systems and tools in place to avoid unnecessary stress and strain.

Firms that can reduce inefficiency free up leaders to focus on long-term goals rather than panicking about missed opportunities. Teams can concentrate on delivering value instead of being overloaded with menial tasks.

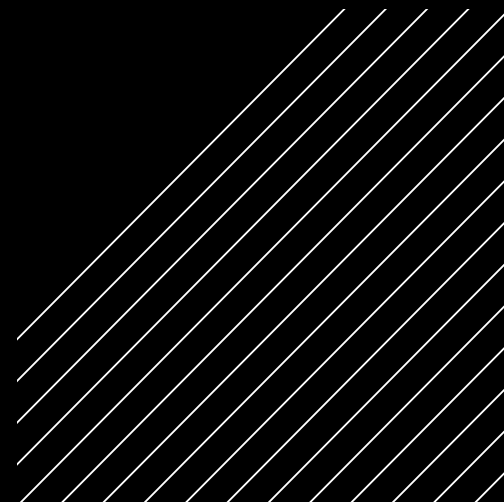
Professional service businesses that invest in systems to support their people will be the ones best positioned for long-term growth.

“Running a business can take a real toll on your health, both mentally and physically. It’s hard to switch off when everything feels like it depends on you. The late nights and constant worry are often signs that you’re carrying too much on instinct and not enough on insight. When you have clear visibility into your business, it gets easier to separate what actually needs your attention from what just feels urgent. That clarity doesn’t just make the business stronger, it gives you a bit of your life back.”



Steve Ledgerwood

CEO of Capsule CRM



The professional services playbook for 2026

07

The overall theme of the research is that professional service firms are facing a paradox. They're optimistic and eager for growth, yet they don't know how to turn that ambition into reality. Too often, leaders are working harder without the ability to execute effectively.

Based on the data, four clear priorities emerge for the upcoming year:

1. Make retention a growth strategy

Two-thirds of revenue already comes from repeat clients, but most firms still act as though acquisition is all that matters. To keep growing, professional services businesses need to think more about how they're going to keep those new customers around for the future:

- Create a structured onboarding process so clients see value as quickly as possible
- Schedule regular check-ins with clients to review how they're getting on and get feedback
- Create valuable content like newsletters and webinars to keep relationships warm
- Use data to monitor engagement and flag any clients at risk of churning.

By treating retention as a growth metric in its own right, firms can build more predictable and profitable pipelines.

"Retention is about showing up for your clients in meaningful ways. A good onboarding process, regular check-ins, and useful content all send the same message: we're invested in your success. When you treat every client like a partnership, not a project, you build the kind of trust that keeps people coming back."

— Keith Weir, Customer Success Lead, Capsule CRM

2. Simplify CRM and centralise your data

Fragmented data is one of the sector's biggest issues, with most admitting they store client data in more than one place. Even CRM users often rely on multiple platforms, undermining the very clarity CRMs are meant to provide.

The answer isn't more complex platforms with hundreds of complicated features. You need simpler, more reliable tools.

Businesses should:

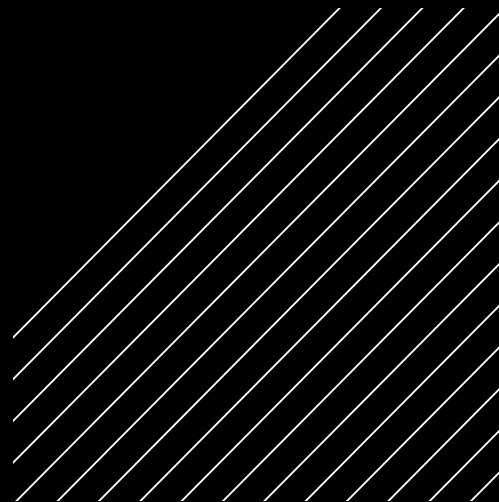
- Establish clear guidelines on what data to capture (and why)
- Choose systems that staff find intuitive and easy to use
- Integrate those systems so information flows between them freely

“Retention is about showing up for your clients in meaningful ways. A good onboarding process, regular check-ins, and useful content all send the same message: we’re invested in your success. When you treat every client like a partnership, not a project, you build the kind of trust that keeps people coming back.”



Keith Weir

Customer Success Team Lead at Capsule CRM



- Standardise workflows so everyone knows which platform to use for which task.

When everyone works from one central hub, businesses can improve visibility and avoid unnecessary work.

“Most small businesses don’t need lots of different tools; they just need the right ones to work together. The simpler your setup, the easier it is for teams to stay aligned

A few good starting points are:

- ***Capsule CRM to keep all your client relationships in one place***
- ***Google Workspace for email, docs, and calendars***
- ***Notion to organise projects and processes***
- ***Zapier to connect your tools and automate updates***
- ***Xero or QuickBooks for a clear view of your finances***

Once everything’s connected, teams spend less time chasing data and everything runs a lot more smoothly.”

— Tom Parker, Founder, The Sales Architect

3. Use metrics as a growth compass

Many firms say they’re monitoring progress, but the research suggests they often focus on maintenance rather than actual growth drivers. To make smarter, data-driven decisions, leaders need to look at the right metrics.

Businesses should regularly track:

- Profit margins by service line
- Revenue growth
- Client acquisition cost (CAC)
- Lifetime value (LTV)
- Retention and churn reasons
- Pipeline velocity (how fast deals move from lead to close).

Again, a centralised system with your CRM is a big help here. Dashboards that consolidate these metrics provide you with real-time visibility into business performance, while regular reviews help you double down on what works and cut what doesn’t.

“Metrics only matter if you’re measuring the right things. Too many firms track activity instead of outcomes, meaning they know how busy they are, but not how effective.

When you bring your data together in one place, patterns start to appear. You can see which clients are profitable, which deals move fastest, and where the leaks are in your pipeline. That visibility turns guesswork into strategy, and that’s what drives real growth.”

— Steve Ledgerwood, CEO, Capsule CRM

4. Leverage AI and automation for efficiency

Manual tasks remain one of the top delivery challenges, yet many firms struggle to adopt automation or AI because of concerns over complexity, cost, or skills. The key is to start small and embed these tools directly into existing workflows.

Practical use cases include:

- Automating data entry and reminders for follow-ups
- Using AI to draft proposals, reports, or meeting notes
- Summarising client interactions and suggesting next steps
- Spotting trends in client behaviour that indicate opportunities or risks.

There's a lot of concern around firms using AI to replace human expertise, and understandably so. However, when used correctly, AI can be a powerful tool that augments professionals and frees them up to do their best work.

With these steps, firms can finally close the gap between optimism and confidence.

"AI doesn't have to be complicated or expensive. Start small, think of it as an extra pair of hands that helps you work smarter, not harder."

Some great starting tools are:

- *ChatGPT can speed up writing proposals or follow-up emails*

- *Make.com can handle repetitive admin and automate workflows*
- *Notion helps you organise notes, projects, and ideas*
- *Capsule CRM has AI tools to track deals and spot trends*

You don't need to overhaul your whole business. Instead, identify what's eating up your time and let AI take care of it."

— Luis Sousa, Co-Founder, The AI Break & Scalit.co

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Conclusion - from hope to confidence

08

The story of UK professional services in 2025 is one of ambition tempered by uncertainty. Nearly two-thirds of firms expect growth in the year ahead, yet only a quarter of leaders feel very confident in their ability to consistently generate new revenue.

Optimism is strong, but without the right foundations, it risks remaining unfulfilled.

Throughout this white paper, we've seen the challenges that make execution difficult:

- 1 Firms are relying heavily on referrals and social media, channels that are effective but hard to scale
- 2 Client data is fragmented, often spread across CRMs, spreadsheets, and even paper
- 3 Delivery is slowed by client delays and weighed down by manual tasks
- 4 Technology is widely adopted, but too often poorly integrated, creating more problems than it solves.

All of this takes a human toll, with nearly half of respondents admitting that business worries spill into their personal lives. This all may sound very doom and gloom. However, by recognising and understanding these challenges, professional service firms can address them and make 2026 their best year yet.

Make retention a key part of your growth strategy. Opt for user-friendly tools that share data where it's needed. Track the right metrics, ones that are tied to growth. Use technology strategically to increase efficiency. Perhaps most importantly, take action to protect the team's well-being for sustainable growth.

Capsule CRM is designed with this reality in mind. Unlike bulky platforms that overwhelm users with unnecessary tools, Capsule CRM keeps things simple with useful features, including:

- **Sales Pipelines.** Capsule CRM's visual pipelines make it easy to track deals as they progress, from the initial conversation to the closed sale. Managers can see what's next and spot any bottlenecks before they become a problem, helping everything run smoothly.
- **Contact Management.** We've seen how fragmented data is a significant challenge for professional service businesses. Capsule CRM overcomes this by bringing together all your prospect and client details — contact info, emails, notes, activity, files — and collecting them in a single, intuitive system.
- **Tasks and Calendar.** Capsule CRM lets you set tasks and reminders linked directly with your clients and deals, all synced up with your calendar. Everyone knows what's next and who's responsible, which improves teamwork and reduces stress.
- **Workflow Automation.** Repetitive admin is one of the biggest

drains on time and energy. Capsule CRM takes those routine tasks off your plate, helping you speed up your processes while maintaining consistency. In turn, your team has more time to focus on high-value tasks.

- **Projects.** What happens after you close a deal? Capsule CRM's Projects feature helps professional service firms manage delivery from start to finish, ensuring clients stay satisfied and are less likely to churn.
- **Sales Analytics.** Get real-time insight into your business performance with a visual dashboard that gives you everything you need to know without getting overwhelmed. Track key metrics like pipeline forecast, pipeline growth, average sales value and lost reasons.

CapsuleCRM is simple to set up and use, integrating with the tools you already rely on. Businesses can manage relationships, track opportunities, and deliver work that delights clients.

2026 can be the year that professional service firms stop leaving growth to chance. With the right systems in place, the optimism that so many have can be made a reality.

Capsule

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