

GrabDocs for Professional Services

Find Anything Instantly

All client information—proposals, contracts, meeting notes, reports, presentations, research, and correspondence—is stored securely in one searchable location. GrabDocs automatically categorizes every file for instant retrieval

Partners share clear client updates with teams. Consultants and staff can ask questions using Chat and instantly get exact information from all records.

Turn Past Work Into Business Intelligence

Analyze client engagements and documents to identify patterns. Track client engagement trends and patterns

Understand team performance and utilization insights. Understand service delivery insights across projects

Never Lose Meeting Knowledge

Professional video meetings directly from the platform for client meetings, strategy sessions, or team collaboration. Automatic generation of clear summaries of key discussion points and decisions.

Meeting recordings, transcripts, and summaries automatically indexed and searchable. Full searchable transcripts for reference

Work From One Connected Workspace

Full Google Calendar integration for seamless scheduling. Create client meetings, project reviews, and team sessions directly from GrabDocs

Use smart @ mentions to reference team members, workspaces, or documents. Attach client documents directly to calendar entries.