

Collective 54 Q3 Retreat Teaches Founders to Expand Margins With AI

At the Margin Expansion Retreat in Jackson Hole, founders learned to redesign their services using AI to grow, scale, and exit their firms.

DALLAS, TX, UNITED STATES, July 23, 2026 /EINPresswire.com/ -- Collective 54, the [mastermind community](#) for founders building [AI-Native professional services firms](#), hosted its Q3 Margin Expansion Retreat July 15 to 17, 2026 in Jackson Hole, Wyoming. Roughly sixty founders of boutique professional services firms gathered for two days focused on a single question: how to expand margin by redesigning services around artificial intelligence.

Members were introduced to the AI Service Design Manager. The premise is that most of a firm's margin is determined by how a service is designed, long before it is ever sold or delivered. AI now makes it possible to design services that are more profitable by design. Founders explored how to shift routine work to AI while keeping human judgment and accountability at the center of the firm.

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*Jeff Klaumann, President,
Collective 54*

Collective 54 framed the shift as a move from artisan to system designer. Rather than personally perfecting every engagement, founders learn to design services that AI helps run, so the firm can grow and scale without depending on any single person.

Over two days, Collective 54 founder Greg Alexander taught the approach while members applied it to one of



Collective 54 Logo

their own services, then shared what they found with the room for candid peer feedback.

Each founder left with a working blueprint for redesigning services to achieve best-in-class profit margins. The retreat was sponsored by DelMorgan & Co., a global investment bank and Collective 54 Ecosystem Partner that helps members prepare to sell their firms when the time is right.

"In most boutique firms, designing the service is the most important job nobody actually owns. It gets done on the side of the desk, squeezed between client work by whoever has a spare hour. Yet how a service is designed sets its margin, its quality, and what the firm is worth at exit. AI is what finally changes that. The Service Design Manager role turns service design into a real job with the capacity to do it well, and that is what separates a good firm from one a buyer competes for." Jeff Klaumann, President, Collective 54.

About Collective 54

Collective 54 is the mastermind community for founders building AI-Native professional services firms, and the first community exclusively for founders of firms in NAICS 54. Designed to help these founders make more money, make scaling easier, and make an exit achievable, the Collective 54 community has six key features.

Network – A curated community of founders who apply and are admitted based on strict criteria, ensuring every member is a peer worth knowing.

Content – Actionable learning content with proven best practices, proprietary methodologies, practical tools, pre-configured templates, and on-demand courseware tailored to scaling professional services firms.

Data – Insights based on data to value the firm and guide key financial decisions.

Coaching – Personalized support through one-on-one sessions, small-group coaching, and structured mentor-protege relationships.

Events – Impactful weekly virtual sessions, monthly deep-dives, quarterly regional retreats, and the annual flagship event, The Reunion. All designed for real-time learning and connection.

Software – Purpose-built member portal featuring a searchable directory, event calendar, meeting archives, and a business exchange for member-to-member referrals.

Collective 54 serves NAICS 54 which includes consulting, IT services, marketing agencies, accounting and finance, legal services, architectural and engineering services, design, and software development firms. With a few hundred members across North America, the community continues to fuel growth and success stories throughout the professional services

sector.

Learn more about how Collective 54 works: <https://www.collective54.com/what-is-collective-54/>

Listen to the [Pro Serv Podcast](https://www.collective54.com/podcast/): <https://www.collective54.com/podcast/>

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