



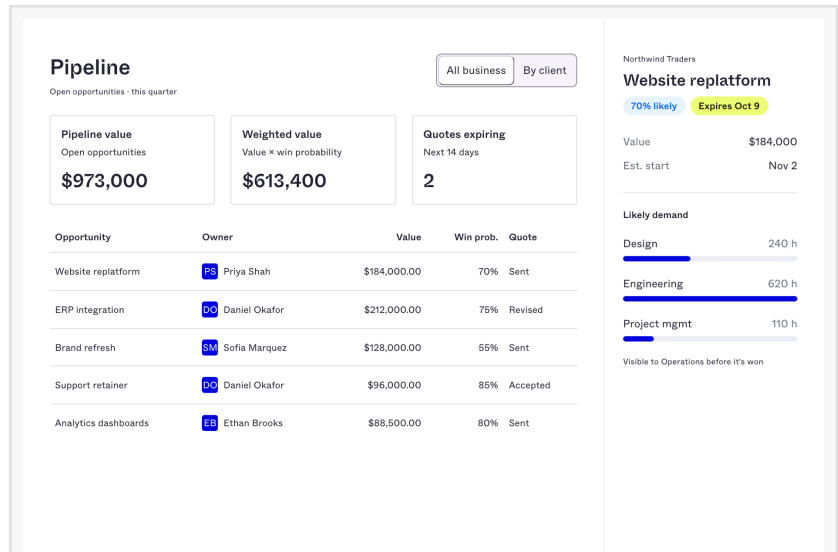
Accelo Extends the Client Lifecycle With New Quoting and Pipeline Capabilities

Accelo launches Quote Designer and new client management capabilities to connect pipeline, proposals, delivery, and financial performance.

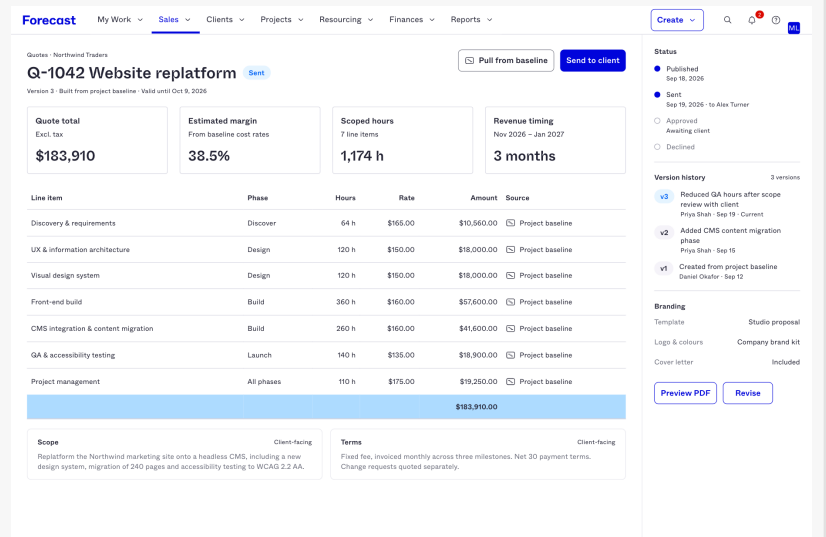
DENVER, CO, UNITED STATES, October 6, 2026 /EINPresswire.com/ -- Accelo, the AI-powered professional services automation platform, today announced new client management and quoting capabilities designed to connect more of the professional services lifecycle, from early pipeline visibility and scoping through client-ready proposals and delivery.

For many professional services organizations, the work behind a proposal begins long before the proposal itself. Teams scope the engagement, establish rates, estimate revenue, and begin evaluating resource needs, then recreate much of that information in a separate document when it is time to send something to the client.

Accelo now brings more of that workflow together. Teams can see potential work earlier, create branded client-ready quotes from information already developed in Accelo, and retain a clear history of what was sent, changed, approved, or declined.



Accelo's new Global Opportunities view brings opportunity-stage work together in one place.



Quote Designer pulls line items from Accelo data, where the scope and financial assumptions behind the work have already been developed.

“Professional services teams make important delivery and financial decisions before a project ever begins. The closer those early assumptions stay to the work that follows, the easier it is for sales, operations, finance, and delivery to stay aligned.”

— Joe DiPaulo, CSO, Accelo

Better Visibility Into Work That May Be Coming

New pipeline views give teams a clearer picture of potential client work before it becomes an active delivery commitment.

Users can review opportunity value, win probability, quote status, expiration date, ownership, and client context across the business or within an individual client relationship.

That visibility gives operations and delivery leaders more time to understand the demand the pipeline could create while allowing organizations that rely on dedicated CRM platforms such as Salesforce or HubSpot to continue using those systems for their broader sales and marketing processes.

[Learn more about Accelo client management software](#)

Turn Scoped Work Into a Client-Ready Quote

Accelo Quote Designer gives teams a way to move from the work they have already scoped to a polished client-facing proposal without re-entering the same information elsewhere.

Quote line items can be created from the scope, rates, and revenue assumptions already developed in Accelo. Teams can then apply branding and add introductions, scope descriptions, terms and conditions, agreement language, and other client-facing content using a live-preview editor.

The result is a proposal workflow that stays closer to the information behind the work instead of creating another version that has to be maintained separately.

[See how Accelo Quote Designer works](#)

A Clearer Record of Every Quote

The new workflow also gives teams greater visibility after a quote is created.

Quotes can be tracked through Published, Sent, Approved, and Declined statuses. Version history and an audit log preserve earlier versions and reasons for change, giving client services, operations, and finance a clearer record of how the proposal evolved.

When a quote needs revision, teams can update the existing version while retaining the history

rather than recreating the proposal from scratch.

“The value is in keeping the opportunity, estimate, and quote connected. Teams can create the client document from work they have already scoped, revise it without losing context, and give finance and delivery a clearer record of what changed.”

— Dylan Connerton, VP of Product, Accelo

Extending Accelo Earlier in the Client Lifecycle

Accelo already connects project management, resourcing, financials, and business intelligence for professional services organizations. These new capabilities extend that connected workflow earlier, giving teams more context around potential work and preserving the assumptions behind it as engagements move toward delivery.

Together, the additions help close a common gap between selling the work and preparing to deliver it, while giving organizations flexibility to continue using dedicated CRM platforms where those systems make sense.

Key Capabilities

- View pipeline value, win probability, quote status, expiration date, client, and owner in one place.
- Create client-ready quotes using scope, rates, and revenue assumptions already developed in Accelo.
- Apply company branding and add structured client-facing content.
- Track quote status, versions, audit events, and reasons for change.
- Revise quotes without recreating the proposal and losing its history.
- Carry client and project context forward as work moves toward delivery.

Availability

The new client management and Quote Designer capabilities are available now in Accelo. Existing customers can contact their account representative to learn more.

Professional services organizations that are not yet using Accelo can [book a demo](#) to see how Accelo connects client management, resourcing, delivery, and financial performance across the professional services lifecycle.

About Accelo

Accelo is an AI-powered professional services automation platform that connects project management, resourcing, financials, and business intelligence. Accelo helps professional services firms identify risk earlier, make faster, more informed, smarter staffing decisions, and protect profitability with connected operational data. Learn more at www.accelo.com.

Sarah Frazier

Accelo
sarah.frazier@accelo.com

This press release can be viewed online at: <https://www.einpresswire.com/article/947396805>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2026 Newsmatics Inc. All Right Reserved.