



When Work Meets Intelligence:

Inside WorkCapcha IQ

At Ignite 2025 in November, Microsoft drew a decisive line between organisations that report on work and those that understand it. With the introduction of Work IQ as a new intelligence layer within Microsoft 365, Microsoft clarified how work data and organisational memory combine to surface real productivity and performance intelligence, revealing how work truly flows, where value is created or lost and which behaviours drive outcomes. While these capabilities may sound like new product announcements, they actually formalise a foundational intelligence layer that has long existed within Microsoft's cloud services.

The significance of Work IQ lies less in how it reframes Microsoft's tools and more in the fact that it confirms a strategic shift, one that WorkCapcha IQ has already been building toward. WorkCapcha IQ applies the same intelligence-layer thinking to professional services firms, capturing where work happens and translating day-to-day activity into clear, specific performance and financial insight grounded in how firms actually operate.



WorkCapcha IQ and the rise of the *intelligence layer*

By bringing together knowledge from across Microsoft 365, documents, emails, meetings and chats, Work IQ marks a clear shift from simple visibility into work to true operational intelligence. But while those tools are designed for the general enterprise, professional services firms need something more specific, more contextual and more commercially focused. WorkCapcha IQ builds on that philosophy with a sharper focus: capturing work in context, structuring it for professional services' environments and ensuring it connects directly to utilisation, billing and financial systems. In other words, WorkCapcha IQ is purpose-built for organisations where understanding work, from activity to revenue, underpins performance.



Similar intelligence, built for a *different question*

WorkCapcha IQ takes a similar intelligence-layer approach, but asks a different set of questions:

- How is work actually flowing across clients, engagements, and service lines?
- Where is productivity being lost, through rework, overload, or poor resourcing?
- Which teams are performing well and which are at risk before issues show up in financial results?

Rather than generic workplace analytics, WorkCapcha IQ is designed to surface the performance and productivity insight that accounting firm partners actually care about. Where Work IQ helps organisations understand how work happens,

WorkCapcha IQ ensures that work is captured, allocated, posted and billed, turning activity into outcomes across the metrics that matter most:

- Time to bill
- Chargeability
- Recoverability
- WIP management
- Firm economics



Beyond timesheets: A *clearer view* of performance

Many firms still rely on lagging indicators, billable hours, write-offs, or month-end reporting to understand performance. By the time issues appear, it's often too late to intervene.

WorkCapcha IQ brings a more modern approach:

- Audit-grade time capture
- Near-real-time insight into how work is distributed and delivered
- Visibility into workload intensity and capacity across teams
- Early signals of inefficiency, bottlenecks or unsustainable work patterns



Built to work across *your systems*

That intelligence only delivers value if it fits into the reality of how firms operate. Unlike Work IQ, which sits entirely within Microsoft 365, WorkCapcha IQ is designed to work across a multi-system environment, integrating with the practice management and ERP platforms firms already rely on. With mature interoperability across Business Central, Workday, Salesforce, CCH, IRIS Practice Engine and other PMS platforms, WorkCapcha IQ frees firms from reliance on a single ERP, delivering consistent insight into performance, billing and firm economics wherever work is recorded and managed.

Insight that supports *better* partner decisions

For partners, WorkCapcha IQ enables more confident, evidence-based decisions, including:

Performance management

- Understanding not just who is busy but where effort is delivering value

Resourcing and capacity planning

- Balancing workloads more effectively across teams and service lines.

Profitability and margin protection

- Identifying misalignment between effort and fees before it impacts results.

Strategic planning

- Tracking trends over time to support growth, investment and pricing decisions.

This mirrors the value proposition of WorkIQ but applies it directly to the commercial and operational pressures of professional services' firms.

Enabling *better* conversations

As with modern Microsoft insight tools, WorkCapcha IQ is not about monitoring individuals. It is about creating a shared, objective view of work that enables better conversations:

- Between partners and practice leaders
- Between operations, finance and delivery teams
- Between performance expectations and sustainable ways of working

The outcome is a more insight-led approach to productivity, one that supports both firms' performance and their people.



A purpose-built *intelligence layer* for professional services

WorkCapcha IQ is a time and productivity intelligence platform purpose-built for professional services and accounting firms. It delivers accurate and deep operational insights that translate directly into revenue, utilisation and profitability gains.

Microsoft's WorkIQ demonstrates what's possible when organisations use data to understand how work happens. WorkCapcha IQ takes that same philosophy and makes it relevant, actionable and commercially meaningful for firms – entering its next phase of modernising the financial backbone of the sector through real-time, accurate, and context-rich insights embedded in Microsoft Power BI.

Critically, this intelligence belongs to the firm: WorkCapcha IQ's role is to surface insight from the workflows within professional services' firms and crucially not to monetise or withhold the deeper value embedded in a firm's data.



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