

How PTS Blends Human Empathy with AI-Powered Dealmaking

RESULTS

15% increase

in deal closure rates

Improved

customer service

Faster

time to close

EMPLOYEES

< 25

CATEGORY

AI services

INDUSTRY

Healthcare
business services

“AI is evolving so fast that having access to specialized expertise on demand means we can keep innovating without waiting for internal bandwidth. It’s a combination that keeps us agile and ahead of the curve.”

Rebecca Kilibarda
COO, Professional
Transition Strategies

When a dentist decides to sell their practice, it’s not just a major financial transaction; it’s also an emotional milestone. The PTS Group, a healthcare M&A specialist focused on dentist and wellness practices, has earned its reputation by guiding owners through this life-changing decision with diligence and empathy.

To serve clients at the highest level, PTS looked to AI to help its team identify the best opportunities for both sellers and buyers. But no existing solution met their needs. Without an IT department or in-house AI expertise, they chose a different path: building a first-of-its-kind solution from scratch with the help of a freelancer on Upwork.

The challenge: trusting a freelancer with a high-stakes project

PTS was already comfortable hiring freelancers through Upwork for SEO, CRM support, and other technical projects. But building a proprietary AI platform was different. This initiative was central to their competitive advantage, and handing it to someone outside the company required a new level of trust.

“Just like practice transitions, trust is everything,” says COO Rebecca Kilibarda. “We were most concerned with finding an AI expert who had both the technical ability and a deep understanding of our business model to create a truly industry-defining tool.”

Working in health care also meant navigating strict compliance, privacy, and data sensitivity standards. “These aren’t areas where you can afford mistakes or casual handling of information,” explains Rebecca.

The solution: pairing Upwork talent with their proprietary vision

Rebecca knew what the ideal solution should be. The challenge was finding the right freelancer to build it. For that, she turned to Upwork.

“It all starts with a detailed project description,” Rebecca says. That includes outlining technical requirements, business context, and clear milestones. She got a headstart using the [Job Post Generator](#), powered by Uma, Upwork’s Mindful AI. Not only did it help her draft a job post in seconds, “it also helped us capture every critical detail, ensuring our search was as effective as possible.”

From there, the team carefully vetted candidates by reviewing portfolios, checking client reviews, sending targeted follow-up questions to see how candidates solved problems, and interviewing top matches to evaluate cultural fit.

“Trust is everything,” Rebecca explains. “We’re creating a proprietary tool that will be one of our core differentiators, so we needed to feel confident the freelancer could handle both the complexity of the build and the nuance of our industry.”

That confidence came when they discovered AI specialist [Julia Komissarchik](#). Julia’s background in patents and intellectual property protection set her apart, signalling she understood the importance of confidentiality and protecting proprietary innovations.

With Julia's expertise, PTS built a tool that uses deep learning to evaluate buyer and seller profiles and analyzes practice details, financials, and client priorities. They named the tool **Julia.ai** to make it feel approachable and human-centered, while also honoring its creator.



Source: Professional Transition Strategies

Building an AI-driven future with humans at the center

For PTS, Julia.ai reflects a commitment to scaling innovation without losing the personal touch their business is built on. “Our brokers are eager to adopt her because they aren’t worried about being replaced by technology. They see Julia.ai as another tool in their extensive practice transition toolbox,” says Rebecca.

The company continues to explore ways to integrate AI into their workflows. Rebecca is excited and prepared because skilled freelancers will remain central to that journey. “AI is evolving so fast that having access to specialized expertise on demand means we can keep innovating without waiting for internal bandwidth,” Rebecca explains. “It’s a combination that keeps us agile and ahead of the curve.”

The results: more deals closed and in less time

Launched in February 2025, Julia.ai is already transforming how PTS operates. Early outcomes include:

- A 15% increase in deal closure rates
- Faster time to close
- Improved customer service

While Julia.ai manages the heavy data analysis, brokers gain more time to focus on what they do best: advising clients and building relationships.

“Julia.ai doesn’t replace the human connection that our business thrives on; she enhances it.”

With every deal, the system becomes smarter. Julia.ai learns from market trends, buyer demand, and past transactions to deliver sharper recommendations in real time. “In many ways, Julia.ai makes the process more personal,” Rebecca explains. “We can tailor our outreach and recommendations based on a deeper, data-backed understanding of what each doctor needs.”

One story stands out. A rural specialty practice approached PTS after another broker failed to find a buyer. Julia.ai identified a previously overlooked match by going beyond basic criteria like geography and specialty. The buyer turned out to be a perfect fit. They were thrilled with both the practice type and rural location, even though they weren’t active buyers or searching for those criteria.

“That moment validated our entire Julia.ai investment,” Rebecca says. “Without her, we might never have made that connection using traditional methods.”