



# **Acing GCC Support with AI, Automation & Cloud: A Practical Playbook**

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# The ground has shifted: GCC clients' expectations have fundamentally changed

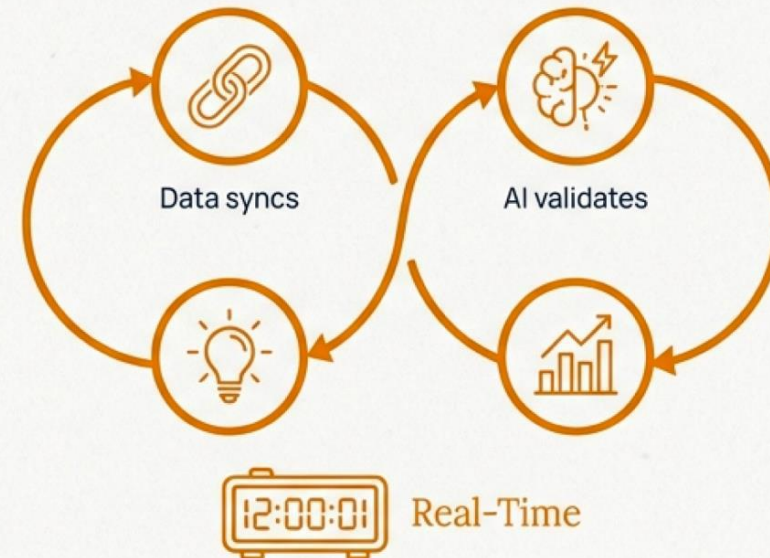
Today's GCCs operate in connected ecosystems, demanding **financial reporting that syncs with global HQ timelines**. The new standard is almost-instant access to accurate financial data and real-time reporting. Speed is no longer a differentiator; it is a non-negotiable expectation. CA firms are expected to match this high-speed cadence.

## Yesterday's Cadence



 Days / Weeks

## Today's Expectation



# Automation is redefining the value of professional services

Global research shows a clear divergence: AI enhances roles based on judgement and communication, while making purely transactional roles obsolete.

## HIGH RISK

- Routine bookkeeping
- Basic compliance filings
- Rules-based verifications
- Manual reconciliation



## HIGH VALUE

- Interpretation of data
- Strategic advisory
- Stakeholder communication
- Complex judgement calls



“ICAI has emphasised that technology acumen is becoming as fundamental as technical accounting knowledge. Those who do not evolve risk professional obsolescence.”



# Your new value proposition: Become a strategic co-pilot to GCC leadership



The crucial value-add for GCCs is no longer just ensuring books are correct. It's about helping local management win within their global organisations.

✓ **Enable faster reporting to global headquarters**

✓ **Deliver sharper analytics for cost and risk decisions**

✓ **Provide stronger compliance comfort for boards**

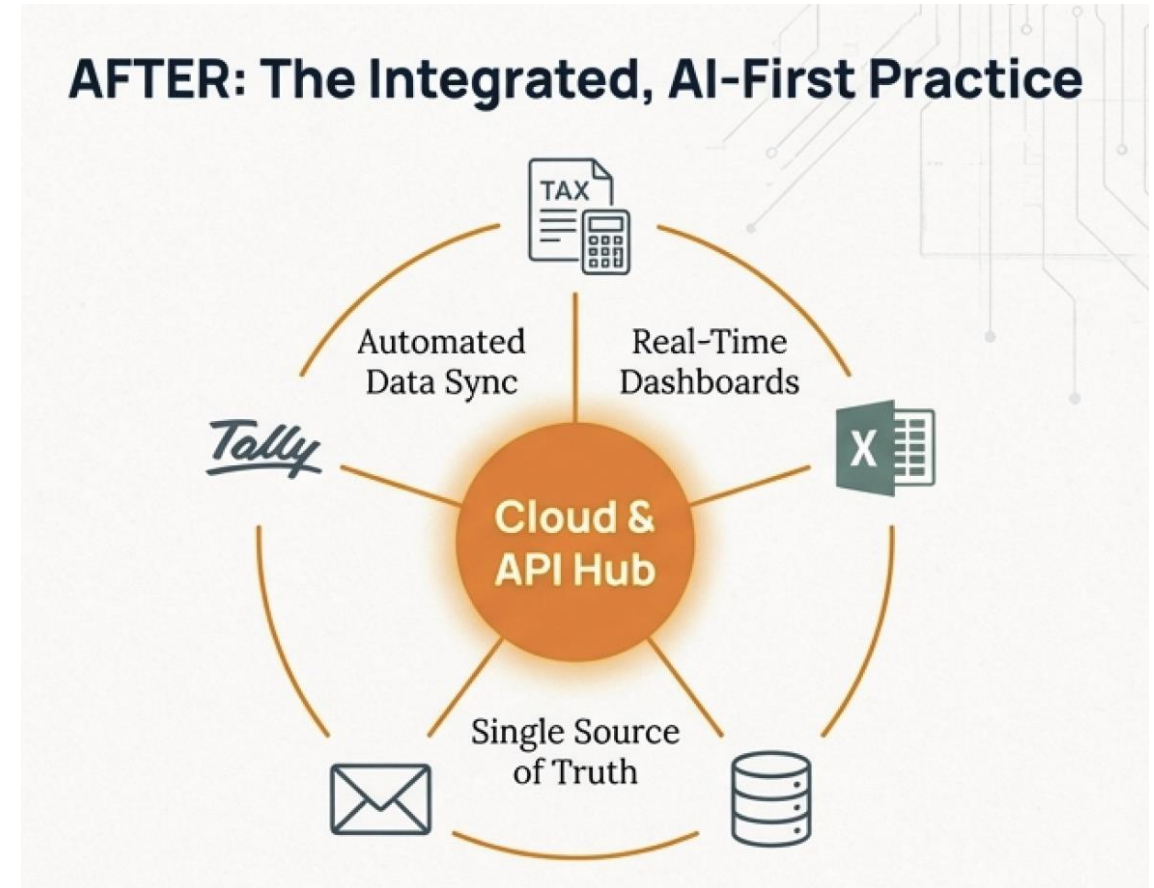
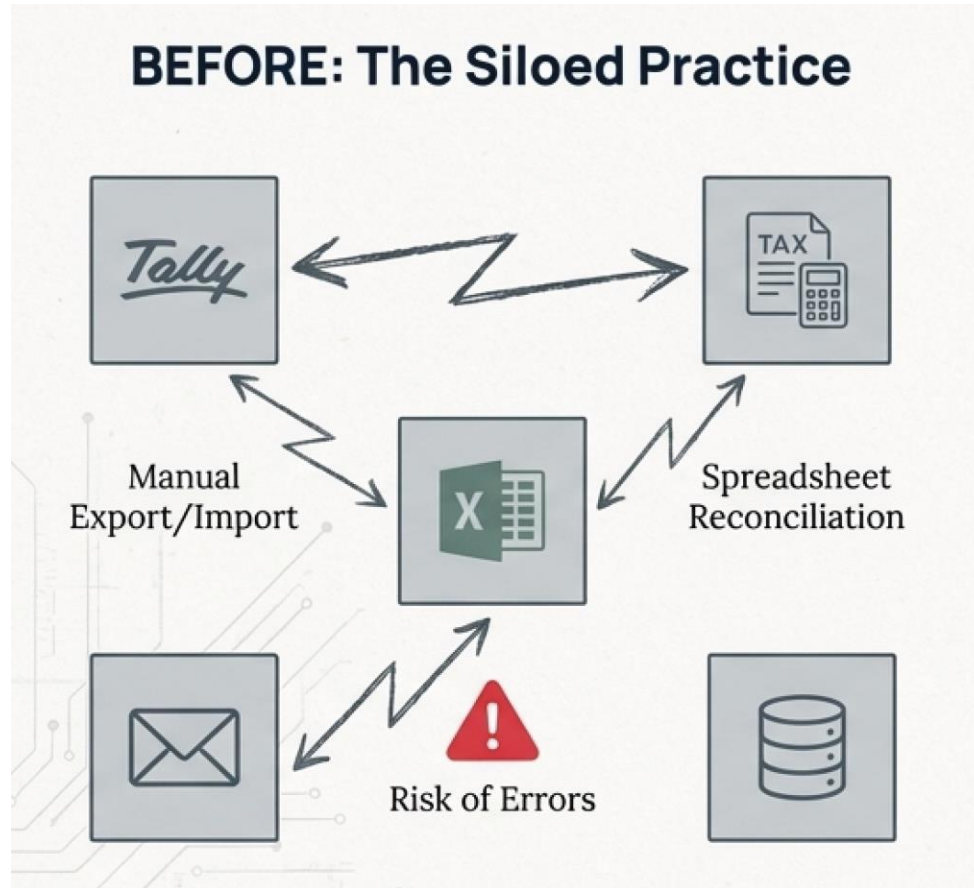
✓ **Create better documentation for regulators**

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An AI-enabled, cloud-based, privacy-strong firm transforms Indian cost advantages into strategic value advantages.



# Move from fragmented toolset to a cohesive technology architecture



# Practical playbook for tech transformation.

Moving from scattered pilots to scalable transformations requires a structured approach.

1

## Outcomes

Define your primary business goal.

2

## Design

Build a cohesive tech stack and capable team.

3

## Control

Ensure enterprise-grade security and governance.

4

## Rol

Measure value against a clear baseline.



# Start with a single, sharp business outcome.

Generic innovation drives fail. Technology adoption plans must be tied to a specific, primary business outcome. Choose one clear goal to rally around.

## EFFICIENCY

Reducing hours and errors in compliance work.

**Example Goal:** Reduce month-end close from 10 days to 3.

## DIFFERENTIATION

Creating unique insights and client experiences.

**Example Goal:** Provide real-time cash deficit projections for all retainer clients.

## EMPLOYEE ENABLEMENT

Freeing teams from repetitive work to focus on advisory.

**Example Goal:** Cut manual data entry in GST reconciliation by 70%.



# Build sustainable capability: Not just one-off projects



## 1. Create a Dedicated Tech Lab Team

- A small, focused group (3-5 members).
- Experiment with tools, document playbooks, and train other functions on proven solutions.
- This model is faster and more scalable than running isolated pilots in every team.



## 2. Establish Clear Ethical Guardrails

Key questions to answer:

- Can client data be used to train internal AI models? Under what conditions?
- How will generative AI outputs be reviewed for accuracy and bias?
- What specific information can never be uploaded to third-party AI systems?
- Who is accountable for decisions made or supported by AI?



## 3. Hire & Promote for Learning Agility

Prioritize people who can quickly learn tools, design automations, and improve processes.

This represents a cultural shift from valuing only the mastery of current, static rules and forms.



# Design: A blueprint for your cloud-enabled AI-assisted tech-stack



## Bookkeeping

Tally Prime, Zoho Books, with automation layers connecting bank statements, invoices, and e-commerce.



## Data & Document Management

Secure cloud repositories like Google Drive, OneDrive with granular access control and audit trails.



## Tax Filing

GSP/ASP platforms with AI-enabled reconciliation (GSTR 2B vs books, TDS vs Form 26AS).



## MIS & Analytics

Business Intelligence tools (Power BI, Zoho Analytics) for real-time dashboards and predictive reporting.



## Payroll & HR Compliance

Cloud platforms (greytHR, Zoho Payroll) with API integrations for direct-to-ledger accounting.



## Audit & Reconciliation

Automation tools processing CSV/Excel for AI-assisted matching and trend analysis.



## Practice Management

Integrated systems for workflow, billing (WIP), and knowledge management to provide visibility into resource utilisation and profitability.



## Communication

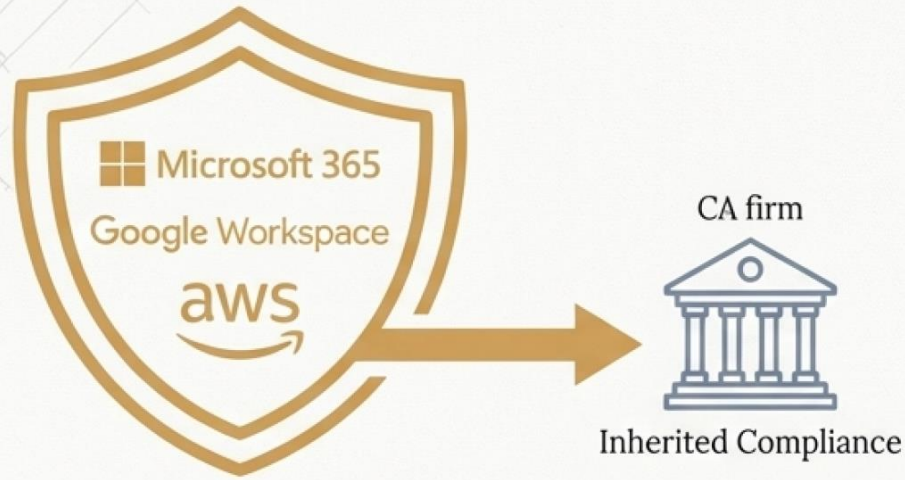
Secure & multi-channel communication (email, voice calls, SMS, WhatsApp).



# Achieve enterprise-grade security without an enterprise budget

You don't need to build your own data centres. Leverage managed cloud services that already carry global certifications.

## Inherit Compliance



Choose platforms like Microsoft 365, Google Workspace, or AWS. They provide enterprise-grade security 'out of the box,' allowing you to inherit their ISO 27001 and SOC 2 compliance.

## Implement Essential Safeguards



Strong encryption for all client data (in transit and at rest).



Multi-factor authentication (MFA) for all users.



Strict role-based access controls (RBAC).



Secure document sharing platforms (instead of email attachments).



Regular security awareness training for all staff.



# Making the business case: A practical approach to measuring ROI.

## Control Costs with Phased Implementation

- Start with 1-2 high-impact processes (e.g., GST reconciliation, document sharing).
- Use per-user/per-entity subscription plans instead of firm-wide licences.
- Explore open-source or low-code platforms as your in-house capability grows.



## Measure Value Against a Clear Baseline

### Before: Track your current state

Manual hours spent per client on key tasks. Average turnaround time for reports and returns. Error and rework rates. Staff attrition in repetitive roles.

### After: Measure the improvement

Reduction in manual hours. Faster turnaround times. Lower penalties or claims. Increased fees from new, higher-value advisory services.



# The future is not about being a number-cruncher; it is about being a strategic partner!

The firms that will win in the GCC ecosystem are those that can demonstrate three things:

Their processes are **AI-enabled** and data-driven.

Their platforms are **cloud-based**, integrated, and efficient.

Their approach to **privacy and security** meets or exceeds international expectations.

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