

## AI TRANSFORMATION TALES

# Achieve 50% Cost Savings with **AI-powered** **tax and invoice** **assistant**



## BACKGROUND

Our client, a trusted and respected global professional services firm, offers a comprehensive range of advisory, tax, and audit services to clients around the world. With its extensive expertise, global reach, and dedication to innovation and ethical practices, our client plays a pivotal role in helping businesses and organizations thrive in a dynamic and ever-changing business landscape.

Recently, our client approached us when they realized that managing and extracting critical information from a vast collection of invoices and tax documents has become more time-consuming and erroneous. With an extensive client base and a constant flow of new information, they needed a search solution that could assist their tax agents in retrieving relevant data efficiently and accurately. Moreover, classifying tax categories from these documents was a time-consuming and error-prone task, impacting their overall productivity.



## THE SOLUTION

Our team of AI experts performed a comprehensive analysis of the challenges presented by the client and its operation's landscape. We recognized the need for a search solution that could efficiently navigate and extract critical information from a vast collection of invoices and tax documents. However, the manual classification of tax categories was a time-consuming and error-prone process, impacting the overall productivity of the client's tax agents. We identified the key requirements as efficient information retrieval, accurate tax category classification, and a user-friendly interface for seamless interaction.

Following are the primary activities performed to deliver the expected business results:

- **Data Collection and Preparation:** gathered and preprocessed the extensive collection of invoices and tax documents. This involved cleaning and structuring the data to ensure consistency and compatibility with our Gen AI-powered search solution.
- **Knowledge Base Development:** leveraged advanced natural language processing (NLP) techniques to index and organize the vast array of tax-related information. By leveraging Gen AI technologies, our experts enabled the system to understand and interpret tax jargon and complex terminology.
- **Categorization:** trained the Gen AI model specifically for tax category classification. Using supervised learning techniques and a labeled dataset, the model learned to identify and categorize tax-related information accurately.
- **Solution implementation:** integrated the assistant with the custom knowledge base to provide intelligent and contextually relevant responses to user queries. This helped the client's business team understand natural language inputs, mimicking a human-like conversation.



## TECHNOLOGY SNAPSHOT

- Gen-AI



## BUSINESS BENEFITS

- Assured classification accuracies of up to 90% or higher
- LLMs are capable of understanding documents written in legal or technical jargon, with accuracies exceeding 90%.
- LLMs can handle millions of documents, processing terabytes of data in a matter of hours
- Cost savings of up to 50% in document processing expenses.



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