Insight AI

CLIENT STORY

Enhancing Efficiency and Scalability for a Global Accounting Body



Accounting

Story Snapshot

A global professional accounting body needed to modernise its operations to support over 250,000 members and 500,000 students across 180 countries.

Faced with manual processes, scalability limitations, and inefficiencies in service delivery, they partnered with Insight AI to build a tailored, automated, and scalable platform.

This transformation streamlined operations, reduced costs, and improved the experience for both employees and members.

The Challenge

Before engaging Insight AI, the organisation relied on outdated systems that struggled to support global operations.

To maintain leadership in the accounting profession, a scalable, automated solution was needed to streamline operations, improve user experience, and future-proof technology infrastructure.

- **Manual Processes:** Many workflows were labour-intensive and prone to human error.
- **Scalability Limitations:** Existing systems could not efficiently handle growth.
- **Inefficiencies in Service Delivery:** Members experienced delays accessing essential services due to inefficient workflows.
- **Data Utilisation:** Limited ability to leverage real-time analytics for informed decision-making.





The Solution

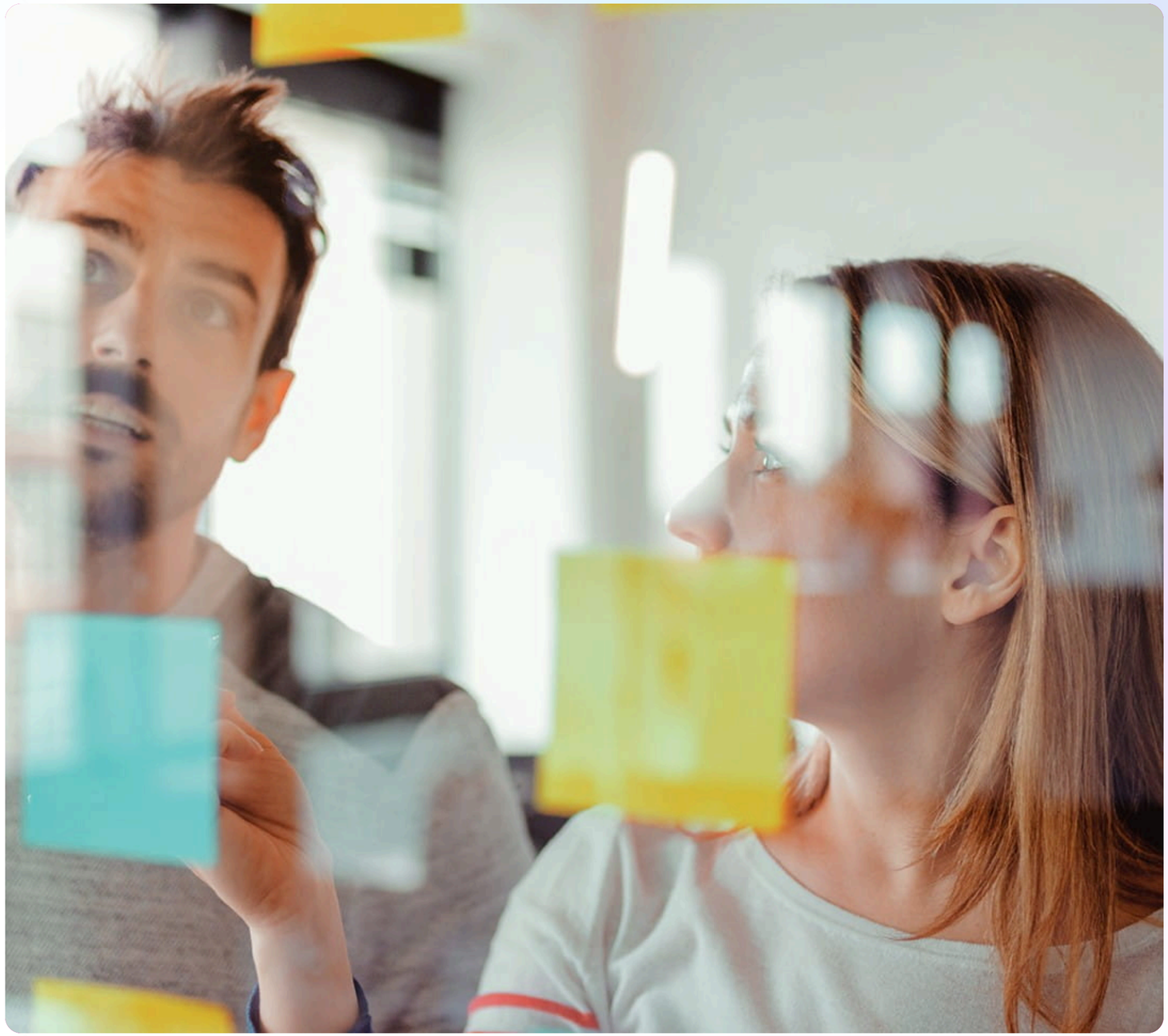
Insight AI delivered a bespoke, cloud-based platform addressing these challenges through:

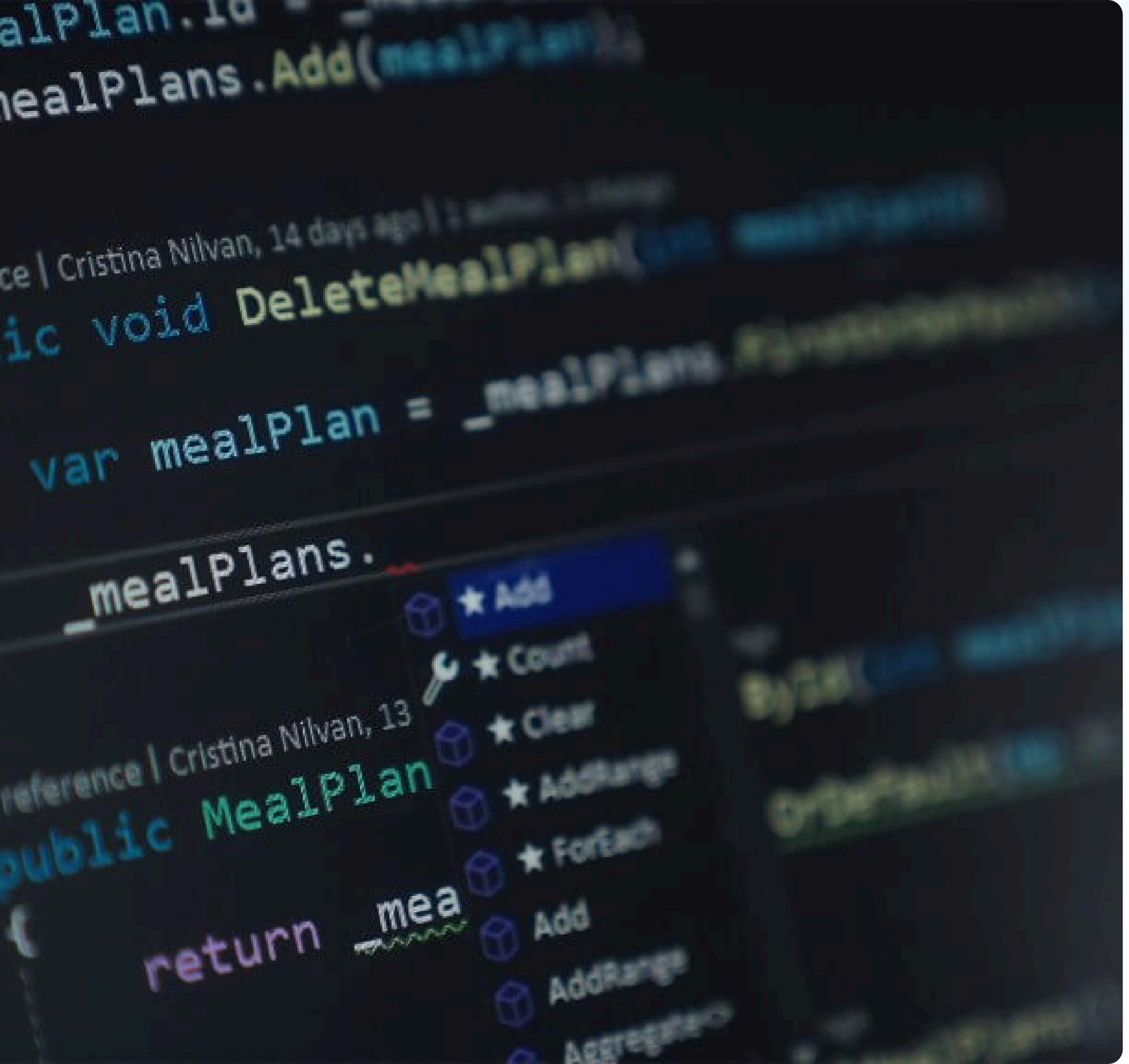
- **Process Automation:** Automated workflows to reduce manual intervention and errors.
- **Scalable Cloud Architecture:** Leveraging Microsoft Azure for global accessibility and reliability.
- **Real-Time Data Analytics:** Azure Data Factory and analytics tools enabled informed decision-making.
- **Modern Technology Stack:** .NET Framework, Microsoft SQL Server, React, and C# ensured robustness and high performance.
- **Enhanced Security & Compliance:** Azure AD B2C custom policies, multi-factor authentication, and regulatory compliance implementation.

Results

The implementation of Insight AI' solution delivered measurable improvements:

- **Cost Savings:** Automation and resource optimisation significantly reduced operational expenses.
- **Operational Efficiency:** Streamlined processes enabled faster service delivery and improved internal workflows.
- **Employee Productivity:** Teams spent less time on manual tasks, focusing on high-value initiatives.
- **Scalability & Future-Proofing:** Platform supports long-term growth and expansion into new markets.
- **Improved Member Experience:** Faster, more reliable access to essential services increased satisfaction.





Technical Highlights

- **Agile Development Approach:** Iterative methodology ensuring flexibility and adaptability.
- **Cloud-Based Infrastructure:** Hosted on Microsoft Azure for scalability, security, and availability.
- **Authentication & Security:** Azure AD B2C authentication and custom policy management for secure access.
- **Integration & Migration:** Legacy systems integrated seamlessly to ensure smooth transition without service disruption.



Why Insight AI?

The client chose Insight AI for its:

- **Deep expertise:** Scalable, enterprise-level application solutions.
- **Collaborative approach:** Seamless integration with existing systems.
- **Commitment to efficiency:** Delivering measurable cost savings and operational improvements.
- **Proven track record:** Secure, innovative solutions aligned with best practices.

By transforming operations, the organisation now delivers faster, smarter, and more scalable services to its global network of finance professionals, strengthening its leadership position in the accounting profession.

Insight AI

Thank you for reading

Confidentiality Statement

This document contains confidential and proprietary information belonging to Insight AI. It is intended solely for use by authorised personnel for understanding and implementing the tone of voice guidelines outlined herein.

Unauthorised disclosure, distribution, or copying of any part of this document is strictly prohibited. If you are not the intended recipient, please notify the sender immediately and delete this document from your system.

By accessing this document, you agree to maintain its confidentiality and to abide by the guidelines set forth by Insight AI for the protection of its intellectual property.