3Cloud

CLIENT SPOTLIGHT
Large Accounting Firm

Global professional services network - and one of the Big 4 accounting firms - leverages AI and LLMs to save 89,000 in man-hours

CHALLENGE

The organization had a strategic initiative to put a use case surrounding AI into production to solve challenges around sales reps' non-compliance of required end-of-day notes. Sales team members are required to complete a sales brief after every sales call, which takes 2-4 hours each to complete. Unfortunately, due to time constraints sales representatives were either failing to complete briefs, or were not doing so in a satisfactory manner. From a man-hours standpoint, this sales brief completion process was approximately 100,000 hours a year that was being spent on this one workstream.

SOLUTION

3Cloud was brought in by Microsoft due to our knowledge and expertise in AI and our ability to complete this in an expedited timeline to meet a very tight deadline for the client. Our engagement began with a 2-week POC to prove that an AI solution would solve the organization's challenges. Upon the successful completion of the POC, 3Cloud developed and productionalized a Generative AI solution that included a Voice to Qualification use case leveraging Azure Cognitive Services with Synapse pipelines that are ingested into an Azure Data Lake.

The solution allows the user to use natural language to answer 5 questions and then utilize AI and the power of Large Language Models (LLMs). By feeding the answers through a 'ghostwriter', they received a consistent output that is put into the client's data lake. Now, any user can search for any one of these sales briefs and easily find the relevant information they need.

⌄ SCROLL TO VIEW THE RESULTS

The engagement combined two 3Cloud Solution Areas (AI & App Development) and utilizes multiple Azure services, including Azure Data Services, Voice to Text, Forms Recognizer, Azure Databricks & Data Lake and Power Apps.

RESULTS

By partnering with 3Cloud, the client was empowered with Generative AI and LLMs to enable a consistent final output to asked questions and reduced task completion by a staggering 89,000 man-hours per year. A sales brief that took 2-4 hours apiece to complete, is now completed in a mere 4-7 minutes. This AI use case creates a repeatable pattern for use within client's large organization and shows how the power of AI can transform organizations across industries and a multitude of use cases.

Our current phase is to roll out this AI solution to 40,000 salespeople across the organization. In addition, 3Cloud is developing a Power App for the client for internal users to create client, project, assessment and question lists including a portal module for external users to complete assessments and get status updates from the client dashboard.

CLIENT PROFILE

Large accounting firm offering tax, audit & advisory services.
Annual Revenue: $35B
Employees: 200,000
Innovation Focus: Data & AI