



AI IN PROFESSIONAL SERVICES: UNLOCKING EFFICIENCY, DRIVING INNOVATION

Abstract

Artificial intelligence (AI) is reshaping professional services, making processes faster, smarter, and more efficient. This paper explores how firms can effectively integrate AI into audit, tax, and legal services while maintaining transparency, human oversight, and employee adoption. It highlights a structured approach to implementing AI-driven workflows. It outlines the transformative potential of generative AI (GenAI) and agentic AI to move beyond traditional automation. By embracing AI strategically, organizations can streamline operations, boost productivity, and remain competitive in an increasingly digital landscape.

Introduction

Artificial intelligence (AI) is evolving rapidly. Businesses are striving to leverage its potential to enhance productivity, optimize operations, and deliver greater value to both stakeholders and clients. Most of these organizations act as AI consumers, utilizing large language models (LLM) and AI frameworks developed by industry leaders such as OpenAI, Google, and Microsoft. These tools are helping them streamline business processes and improve service delivery.

Challenges in AI Integration

Despite its advantages, integrating AI into existing business systems presents several challenges for organizations:

Embedding AI into business processes without employees perceiving it as a competitor

Scaling automation while maximizing the benefits of AI

Enabling faster, AI-powered decision making while ensuring human oversight

Designing AI systems that prioritize explainability, transparency, and traceability

This paper discusses how AI can be effectively integrated into the professional services industry. It outlines a strategic roadmap for organizations embarking on their AI journey. Subsequent sections will dive deeper into various AI-driven processes and assess their impact on service delivery.

The Role of AI in Professional Services

Leading professional service firms offer a broad spectrum of services, including audit, tax, assurance, global mobility, and legal services. The integration of AI in these areas can be classified into three categories: engineering-oriented, business-oriented, and regulatory-oriented applications, as shown in Table 1.

Table 1: AI integration across key professional services domains

	Engineering-oriented AI	Business-oriented AI	Regulatory-oriented AI
Key areas addressed	Developing and supporting applications, including software development lifecycle (SDLC) activities	Enhancing business and client-facing user experience	Ensuring compliance with Public Company Accounting Oversight Board (PCAOB) regulations, evolving tax laws, and other regulatory requirements
High-level goals	<ul style="list-style-type: none">• Increase productivity through AI-driven automation• Reduce time to market and operational costs• Streamline processes for greater efficiency• Foster a culture of continuous learning and innovation across the organization	<ul style="list-style-type: none">• Provide real-time insights to accelerate decision-making• Reduce reliance on support and engineering teams for business functionality• Enable users to complete tasks more efficiently	<ul style="list-style-type: none">• Implement robust risk management strategies• Establish AI-driven safeguards to mitigate historical challenges• Promote sustainability and ethical practices to meet global regulatory norms• Navigate and adapt to the complexities of global markets

Structuring Business Processes for AI Integration

Before exploring specific business processes, we must establish a baseline template to illustrate the impact of AI. Generally, a business process consists of six key steps:

Input > Pre-process > Process > Review > Post-process > Output

The key considerations for designing AI-integrated business processes are as follows:

Each step in the process has well-defined entry and exit criteria, with the output of one step serving as the input for the next.

Each phase comprises a specific number of tasks or steps.

Tasks within each step may draw data from multiple sources and be carried out using various tools.

Processes can include manual, semi-automated, or fully automated tasks.

Inputs and outputs impact different stakeholders.





This structured approach ensures consistency, efficiency, and accuracy across stages, reducing errors and optimizing workflow management.

Each pursued opportunity in audit, tax, or global immigration services typically involves a complex business process comprising a mix of manual, semi-automated, and fully automated steps. While firms have already leveraged robotic process automation (RPA) to streamline many of these processes, recent developments in generative AI (GenAI) and agentic AI have unlocked new levels of automation. These emerging technologies further enhance efficiency, reduce operational costs, and deliver greater value to organizations and their clients.

AI in Tax Computation: A Practical Example

To illustrate the impact of AI, consider a tax computation process as illustrated in Table 2.

Table 2: AI's role in tax process automation

 Stage	 Engineering-oriented AI	 Business-oriented AI	 Regulatory-oriented AI
Input	Extract parameters from client documents related to specific state or local taxes and convert them into a machine-readable format	Engineering-oriented	Utilize prompt engineering to extract data, replacing traditional parsing algorithms
Pre-process	Verify whether the collected inputs meet the minimum criteria and validation rules required to initiate the tax assessment process	Business-oriented	AI tax agents perform validations and trigger RPA bots for automated compliance checks
Process	Compute tax based on federal and state-specific regulations	Engineering- and business-oriented	AI tax agents execute tax calculations based on specific state and federal rules
Review	Verify computations against business logic and regulatory rules	Engineering-, business-, and regulatory-oriented	AI tax agents cross-check results to ensure compliance
Post-process	Generate a summary report of findings	Business- and regulatory-oriented	<ul style="list-style-type: none">AI tax agents generate a summary report using a standard template prescribed by regulatory authorities followed by human-in-the-loop review and approvalAI assistants resolve data uncertainties before the signing authority finalizes the report
Output	Share the final report with the client	Engineering- and regulatory-oriented	AI agents generate and validate the final output before distribution

While Table 2 highlights how AI can optimize individual process steps, AI can also serve as a workflow orchestrator. Unlike traditional static workflow engines, agentic AI dynamically selects the most suitable tools, bots, or application programming interfaces (APIs) at each step. It adapts decisions in real-time based on inputs and errors. This adaptive, AI-driven framework can be extended to other domains, such as audit, compliance, and legal services, with tailored workflows for each.

Conclusion

Organizations should map their end-to-end business processes and identify AI-driven enhancements that deliver the highest return on investment (ROI). Successful AI implementation requires adherence to ethical frameworks established by regulatory bodies to ensure compliance and preserve human oversight. Employees should view AI agents as intelligent assistants that help with automating manual tasks, minimizing research time, and supporting data-driven decision-making.

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