CA, TAX & LEGAL PRACTICE

The practice that got its juniors out of the photocopier queue

Qualified people spending their week extracting numbers from client PDFs is the most expensive data-entry operation in the city.

WHO WE ARE

Burhan and Purvansh — we teach every session ourselves

WHO THIS IS FOR

Chartered accountancy practice with four partners

JOBS WE LOOKED AT

7

SKILLS WE TEACH

3

WHAT THE TOOLS COST YOU

₹14,000 – ₹24,000 / month at this document volume

PREPARED

10 November 2026

A teaching plan, not a sales proposal. We train your staff; we do not sell you software. udaipurai.in

01 Who will teach you

OUR PROFILE



Purvansh Parmar

BUILDER IN RESIDENCE · AI ENGINEERING & SEO

Founder of Food Never Comes. Ships AI products end to end and runs the SEO that brings them traffic — the rare combination of someone who can build the system and then make the internet notice it.

- Building AI tools that actually run
- Automating the work that repeats every week
- Getting found on Google and inside AI answers
- Knowing what it will cost before you commit



Burhan

BUSINESS LEAD · B2B & CORPORATE ROLLOUTS

Runs the business side of Udaipur AI. Spends his week inside other people's companies working out which processes are worth automating and which are not, then leads the rollout that follows.

- Working out which jobs are worth handing to AI
- What works in hotels, coaching, export and clinics
- Pricing AI work and writing the proposal
- Getting a team to actually change how it works

The two of us teach every session ourselves. No rotating bench of freelance trainers and no guest slot — the people in the room are the people doing this work the rest of the week, which is the only reason the examples are real ones.

02 Where your week actually goes

CA, TAX & LEGAL PRACTICE

A practice of this size receives thousands of client documents a month in every format known to humanity — scanned bills, phone photographs of invoices, bank statement PDFs, WhatsApp forwards, and the occasional actual spreadsheet. All of it has to become structured data before anyone can do accounting with it.

That work falls to articles and junior staff, who spend a large part of every week reading numbers off a screen and typing them into another screen. It is the single largest block of time in the building and it produces no professional judgement whatsoever.

The second drain is correspondence. The same twelve client questions about GST deadlines, document requirements, TDS rates and filing status arrive hundreds of times a month, and each one interrupts someone qualified mid-task.

Partners know the answer involves software. They are also, correctly, extremely nervous — client financial data carries real confidentiality obligations and a hallucinated figure in a filing is not a bug, it is a professional liability event.

03 What your staff do, and what AI can take off them

7 JOBS

Every job the team repeats, timed and sorted into three piles. The third column is the point of the whole exercise: more lines here say keep it human than say hand it over.

THE JOB	TIME	WHAT WE'D DO	WHY
Extracting data from client documents	46 h/wk	AI DOES IT	Enormous volume, verifiable against the source, no judgement involved
Answering routine client queries	18 h/wk	AI DOES IT	The same twelve questions, with published answers
Chasing missing documents	12 h/wk	AI DOES IT	Pure scheduling against a checklist
Drafting notices, letters and replies	10 h/wk	AI DRAFTS IT	Drafted in minutes, always reviewed and signed by a professional
Research on a provision or case	9 h/wk	AI DRAFTS IT	Finds the starting point; every citation is verified by hand
Any filing, opinion or sign-off	–	KEEP IT HUMAN	Professional liability. A human signs, and the human reads it first.
Advisory conversations with clients	–	KEEP IT HUMAN	This is the billable product

04 What we will teach your team

3 SKILLS

These are not products we sell you. They are the 3 things your own staff learn to put together in the class, on your own systems — so the people who do the work end up owning the thing that does it for them.

01 The document intake line

What it does for you. A client photographs a bill and sends it on WhatsApp. It appears as structured, categorised, verifiable data in the right client folder within a minute.

What your team learns. A dedicated WhatsApp number receives documents, identifies the client, classifies the document type, extracts the fields with a vision model, and writes a row with a confidence score and a link back to the original image. Anything below the confidence threshold is queued for human review rather than written silently. Every single figure remains traceable to the source document — that is the non-negotiable design rule.

TOOLS THEY LEARN TO USE

WhatsApp Business API | Claude Vision | n8n | Google Drive | Sheets / Tally import

02 The client desk

What it does for you. Routine client questions answered instantly, correctly, with the current deadline — without interrupting a partner.

What your team learns. A grounded assistant trained on the practice's own circulars, checklists and standard answers handles the known questions and nothing else. Anything resembling advice is refused and routed to a human with a summary attached. The refusal boundary is tested deliberately and tightly.

TOOLS THEY LEARN TO USE

`WhatsApp Business API` `n8n` `Claude` `Airtable`

03 The chase list

What it does for you. Missing documents chased automatically, politely, per client, until they arrive.

What your team learns. Each client has a document checklist per period. A scheduled workflow sees what is missing, sends an itemised reminder, stops the moment the document arrives, and escalates to a human after three attempts.

TOOLS THEY LEARN TO USE

`Airtable` `n8n` `WhatsApp Business API`

05 What we will teach them not to do

4 TO AVOID

This is the part most people selling AI leave out, and it is the part that decides whether any of it survives the first year. Your team is taught to recognise these for themselves, not just handed the list.

Any automated filing or sign-off

Professional liability sits with a named individual. No exceptions, ever.

AI-generated tax advice to clients

A confident wrong answer about a provision is a negligence claim. The assistant is built to refuse this category.

Unverified citations in opinions

Models invent case references. Every citation is checked against the actual source before it leaves.

Sending client data to consumer AI tools

Confidentiality obligations. The whole pipeline runs on business-tier agreements with data-retention terms the partners have read.

06 How it benefits you

THE PAYOFF

> **In one line.** Your staff stop spending their week on work a machine can do, and spend it on the work only they can do — without you buying software, hiring anybody, or depending on us after the class ends.

- **Junior hours on data extraction** goes from 46 h/wk to **11 h/wk**.
- **Turnaround on client document to booked entry** goes from 2–4 days to **Same day**.
- **Routine queries handled without a human** goes from 0% to **~70%**.
- **Your own people own it.** They built it, so they can change it when the business changes. Nothing breaks when we leave.
- **Nothing new to buy.** ₹14,000 – ₹24,000 / month at this document volume — that is the whole running cost, paid to the software, not to us.
- **You find out what not to automate** before you waste money on it. That list is longer than the other one.

MEASURE	BEFORE	AFTER	NOTE
Junior hours on data extraction	46 h/wk	**11 h/wk**	Remaining time is verification of low-confidence items
Turnaround on client document to booked entry	2–4 days	**Same day**	Estimated
Routine queries handled without a human	0%	**~70%**	Advisory questions always escalate
Documents still missing at deadline week	~25%	**Under 8%**	From automated chasing
Extraction error rate reaching a filing	Baseline	**Lower**	Confidence thresholds catch more than tired humans do; all filings still reviewed

> **These are worked-out figures, not audited client results.** Modelled on document-processing volumes in mid-size practices, measured extraction times and published document-AI and model pricing.

07 How the training runs

STAGE	WHEN	WHAT HAPPENS
Audit	Week 1–2	Count document volume by type, time extraction, and map the confidentiality boundary first.
Enable	Week 3	Partners and seniors on where the line is. Juniors on the verification workflow.
Build	Week 4–8	Intake line with a human in the loop on everything, loosened only as accuracy is proven.
Hand over	Week 9–10	Runbooks, audit log review, internal owner trained. 90-day review.

> “Placeholder — replace with a real, attributed quote before launch.”
>
> PARTNER, CA PRACTICE, UDAIPUR

Start with the ₹199 session

Ninety minutes, open to anyone, no background needed. Bring one job you repeat every week and you will leave having done it with AI yourself. Every course and every fee is on the website.

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