

Accounting Standards Research AI Tool for Professional Bodies

National accountancy body turns its standards library into an answer desk that never closes

A professional body's AI tool for accounting standards research and member self-service, grounded entirely in its own published guidance, qualification and CPE material, and answering more than nine questions in ten from that corpus.

+50%

Year-on-year growth in questions asked

3

Consecutive years, no rebuild between them

91.9%

Answered from the body's own published material

4.0M

Words of published material made answerable

THE CHALLENGE

Authoritative standards, filed in the body's own terms

A student halfway through the qualification, working out which pathway now applies to her. A practicing member checking what this CPE cycle requires of him, and whether the course he just booked counts. An employer verifying a credential before an offer goes out.

None of them knows the term the body files that answer under, because a national body publishes for the record. Its material is organized the way a regulator organizes things, not the way a member searches. The answer is published, it is right, and it still generates an email to the team.

WHAT IT TOOK, EVERY ONE SOLVED

- **A corpus that will not sit still.** Standards get revised and courses re-listed each year. Four million words stay indexed and current, so the assistant answers from today's guidance.
- **Public traffic, unpredictable questions.** An open assistant takes the precise technical query and the person who does not yet know the vocabulary. Both have to land on a published answer or an honest refusal.
- **The line between an answer and advice.** A professional body can tell you what its requirements say. It cannot tell you what to do about your client. Own-content-only retrieval keeps the assistant on the first side of that line.

SWORN TO SECRECY

A national professional body for chartered accountants in Asia-Pacific, with more than 40,000 members. Shared anonymously at the customer's request. Every challenge, decision and number comes directly from the institute.

AT A GLANCE

INDUSTRY	National professional accounting body	MEMBERSHIP	More than 40,000 chartered accountants, plus the students, employers and firms around them
OBJECTIVE	Turn a deep library of standards, guidance, qualification and CPE material into answers people can get on the first click, without the answer drifting into advice	KEY USE CASES	Member and public self-service, accounting standards research, member technical questions, qualification and pathway guidance, CPE course discovery, membership obligations, inquiry capture
SOLUTION	CustomGPT.ai. A live-chat assistant grounded only in the body's own published content, with a persona the body wrote and tunes itself		

Professional ethics, accuracy and the advice boundary: five things the body would not compromise on

The evaluation was run out of IT, not marketing, with the digital experience team alongside it. That shaped the criteria: the people judging it were the ones who would carry the consequences of a wrong answer.

- 1 **Answer only from what we have published.** Grounded in the body's own corpus, and willing to say *I don't know* instead of improvising. When a question touches CPE obligations or eligibility for a practicing certificate, a confident wrong answer becomes a compliance problem with the member's name on it.
- 2 **Serve the public and the member from the same corpus.** A prospective member, a student mid-qualification, an employer checking a credential and a practicing member chasing a technical point all arrive at the same site. One assistant had to handle all four, with no login between them and a published answer.
- 3 **The voice has to be ours.** A national body speaks with an institutional register that took decades to establish. The persona had to be written and revised in-house, never supplied as a template.
- 4 **An answer should lead somewhere.** Most questions arriving on the site are one step from a course booking or a membership application. The assistant had to carry the conversation to that next step instead of stopping at the answer.
- 5 **It has to run without a project team.** No integration program, no standing internal headcount, no rebuild at renewal. A small IT function had to own it, revise it and keep it current alongside everything else it does.

HOW THEY MADE SURE BEFORE THEY COMMITTED

It earned the front page by proving itself on the questions staff already answered by hand

Start with the questions you already answer twice a week. The real inbound, not a demo script: which pathway applies to me, what do I owe this cycle, does this course count. If the assistant cannot beat the team's own copy-and-paste answer, nothing else matters.

Put it where the questions actually arrive. Live chat on the open site, in the moment somebody is already stuck, instead of a search box on a page nobody visits. Roughly eight in ten questions have come through that channel ever since.

Prove it on the content that carries obligations. Technical guidance and membership requirements first, because those are the answers with consequences. Grounding and honest refusal were tested there before anything easier.

Then let it run. No relaunch, no campaign, no second procurement. It has simply stayed on, and the volume has climbed.

THE CAPABILITY THAT DECIDED IT

The voice belongs to the institution, not the vendor

A national body's authority is partly a matter of language, a register that took decades to establish. Hand it to a vendor template and the assistant stops sounding like the institution within a sentence.

So the persona is written inside the product by the body's own staff, and revised dozens of times since launch: lead with the direct answer, cite the source, say plainly when the published material does not cover the question. When the tone needs to change, it changes that afternoon, with no engineering ticket and no vendor in the loop.

MEMBER AND PUBLIC SELF-SERVICE

- **Live chat on the open site.** No login between a member of the public and a published answer. Roughly 85% of questions arrive this way.
- **One corpus, every audience.** Members, students, employers and the public are answered from the same published material.
- **Inquiry capture in the conversation.** A resolved question can become a course inquiry or an application step instead of ending the exchange.

IN ITS THIRD YEAR

Three years in, the assistant is busier than it has ever been

MEASURE	TO DATE
Year-on-year growth in questions asked, matched periods	+50%
Current weekly volume against its own six-month baseline	+24%
Questions answered to date	7,351
Answer rate	91.9%
Arriving through live chat	85%

WHAT THE NUMBERS SAY

Set the most recent run of months against the same months a year earlier and questions asked are up 50%, with current weekly volume a quarter above the six-month average. Most deployments peak in their first weeks and decay. This one has done the opposite.

Nobody campaigned for it. At the busiest stretch a question arrived every day for twelve consecutive weeks. Behind that sits the number that makes it possible: more than nine questions in ten answered outright from the body's own material. Traffic only compounds when the answers hold up.

WHAT A THIRD YEAR REPRESENTS

Two years are complete and a third is in motion. This is a service the organization now runs on, not a renewal argued on a business case each time.

The foundation took the time, and it is done: a live corpus, a voice the body controls, an audience that has learned to ask.

WHY CUSTOMGPT.AI CAME OUT ON TOP

Grounding suited to a regulator's content. Own-content-only retrieval, with honest refusal when the corpus does not cover the question. Where content carries obligations, a model that declines to guess beats one that is usually right.

A voice the institution controls. The persona is written and revised by the body's own team, in the product, without an engineering ticket.

It keeps running without being rebuilt. A small IT function owns it outright, with no relaunch, no migration and no second procurement. Which is why there is a third year, not a fresh evaluation.

WHAT THIS MEANS FOR YOU

Your answer is already published. It just isn't findable

- Grounding is the product.** In a regulated profession, answering only from your own published material is what earns permission to deploy at all, and it costs far less coverage than expected.
- Put it where the questions are.** The best-grounded assistant does nothing behind a link in the footer. Eight in ten questions here arrive through live chat on the open site.

ONE QUESTION WORTH ASKING

What does year three look like? Launch numbers are easy. Ask any vendor whether their customers' volume in year three is above or below where it started.

The student, the member and the employer no longer need the body's vocabulary to reach the body's answer.