Programme Structure
2 Day Workshop on Communication & Business Skills for Global Outsourcing

Day 1: The Foundations of Effective Communication

Session 1: Introduction & Foundational Concepts (9:00 AM - 10:30 AM)

- **Topic: Understanding the Landscape of Process Outsourcing**
  - Global context, real world examples from outsourcing scenarios, including cultural awareness quickbytes
  - What is shared service accounting?
  - Defining different types of outsourcing: **on-shore, near-shore, off-shore**, and **captive units**. Key benefits and challenges of each model.
  - Cultural Sensitivity and Etiquette: Key to Thriving in Global Business Environments
  - **Case Study Discussion:** Analyse a real-world company's decision to move its finance function to a shared service centre. Discuss the challenges and successes from a communication perspective.
  - **Activity:** "Match the Model" - Participants work in small groups to match a business scenario with the most suitable outsourcing model and justify their choice.

Session 2: The Art of Professional Writing (10:45 AM – 12:45 PM)

- **Topic: "How to Write" for Professional Correspondence**
  - **Use Case Story**
  - **Structuring professional emails:** Best practices for writing subject lines that demand attention, crafting a clear message with a strong call to action, and maintaining a professional tone.
  - Communicating financial information clearly to non-finance stakeholders.
  - How to write assertive yet polite communication — especially useful for CAs working in client-facing or reviewer roles.
  - Show actual anonymized email chains and tax note formats on good vs poor email writing examples, and summary templates for weekly updates, audit planning memos, or tax queries.
  - Introduce and demonstrate quick, no-cost tools that the audience can adopt immediately like Grammarly, Loom, Speechify.
  - **Activity:** Case study on writing a professional email to resolve a billing discrepancy.
  - **Activity:** "Fix the Email" - Participants receive a poorly written email with multiple errors and rewrite it to be professional and effective.
  - **Group Activity:** "Rewrite this mail to suit a UK client" or "Summarise this audit note for a first-time client."

Session 3: Mastering Verbal Communication (1:45 PM - 3:45 PM)

- **Topic: "What to Speak" in a Shared Service Environment**
  - **Use Case Story**

- **The Power of Active Listening:** Techniques for truly understanding client and stakeholder needs beyond what is explicitly said.
- **Structuring a Difficult Conversation:** A step-by-step guide to handling escalations, managing project delays, and delivering bad news constructively
- **Virtual Meeting Etiquette:** Best practices for video calls, from setting an agenda to engaging with a remote team.
- **Activity:** Role-playing scenarios: Participants take on roles of a finance team member and a frustrated client to practice de-escalation and problem-solving.
- **Activity:** Role Play 2 - Include "client-style" feedback from the trainer — e.g., "If I were the U.S. client, here's what liked/disliked about this call." Encourage peers to also rate each other on clarity, politeness, and confidence.

Session 4: Use Cases and Best Practices (4:00 PM - 5:00 PM)

- **Topic: Live Use Cases of Effective Communication**
  - **Use Case Story**
  - **Problem-Solving Frameworks:** We will introduce a simple, step-by-step approach to identifying the root cause of a communication breakdown.
  - **Real-World Scenarios:** Participants will work through complex challenges, such as reconciling conflicting information from two different teams.
  - Building a Communication Toolkit: A summary of key strategies and phrases to use in challenging situations.
  - **Activity: Collaborative Case Study:** The group will work together to analyse a detailed case study involving a project delay and a communication failure, then present their solution.

Day 2: AI, Automation & Advanced Application

Session 1: Foundational Concepts (9:00 AM - 10:30 AM)

- **Topic: The Role of AI in Accounting Processes**
  - **AI vs. RPA:** Clarify the distinction between Artificial Intelligence (AI) and Robotic Process Automation (RPA) and their respective roles in shared services.
  - The AI Hype vs Reality: A reality check on what AI can and cannot do in a business setting. Focus on empowerment, not replacement.
  - Exploration of top AI-powered platforms—Excel AI, Copilot, ChatGPT, and Power BI—for financial data analysis.
  - The Role of Data: An easy-to-understand explanation of how data fuels AI. **Analogy:** "You can't train a chef without ingredients."
- **Topic: Real World Use Cases**
  - How AI streamlines repetitive accounting tasks like **data entry, invoice processing, and reconciliations**.
  - Procure-to-Pay (P2P) Automation: Using AI for Invoice Processing and Automated Matching.

- Order-to-Cash (O2C) & Fraud Detection: Using AI for Automated Receivables and Fraud Detection.
- **Case Study:** Examine how a company used AI-powered bots to automate vendor invoice processing, reducing manual effort and errors.
- **Activity:** "AI Brainstorm" - In groups, identify three repetitive accounting tasks and propose how AI or automation could improve them.

Session 2: Hands-on Demo and Activities (10:45 AM - 11:45 AM)

- **Activity 1: Automating Invoice Data Entry**
  - **Tool: Microsoft Power Automate with AI Builder**.
  - **Live Demo:** Build a simple flow from scratch that takes a PDF invoice from an email, uses AI to extract key data (vendor, invoice number, amount), and populates a row in an Excel spreadsheet.
  - **Guided Activity:** Participants use a simplified template to perform a basic version of this data extraction themselves.
- **Activity 2: AI for Quick Financial Insights**
  - **Tool: Microsoft Excel's built-in "Analyse Data" or "Ideas" feature.**
  - **Live Demo:** Use a sample dataset of expenses. Show how to instantly generate charts, find correlations, and flag outliers without writing a single formula.
  - **Guided Activity:** Participants use their own practice spreadsheet to ask questions like "Which vendor is the top expense?" or "Find me any unusual transactions."
- **Activity 2: Leveraging Generative AI**
  - **Tool: Microsoft Copilot or ChatGPT.**
  - **Guided Activity:**
    1. **Content Generation:** Participants will ask the AI to draft an email to a vendor about an overdue invoice or summarize a long financial report into a few key bullet points.
    2. **Scenario Analysis:** Provide a simple financial scenario (e.g., "What is the impact of a 5% increase in raw material costs on our profit margin?"). Participants will use the AI to generate a quick, high-level analysis.

Session 3: Integrating AI into Communication Workflows (11:45 AM - 12:45 PM)

- **Topic: "Use of AI" for Enhanced Communication**
  - **Communicating Process Changes:** Strategies for explaining to stakeholders how their workflows will change due to automation. Automating routine email responses with AI-powered systems.
  - **Using AI for Communication:** Explore how AI tools can assist with drafting emails, summarizing long documents, or providing real-time language translations in meetings.
  - **Activity:** "The Bot's Instructions" - Participants write a clear set of instructions for an AI bot to handle a specific accounting task, such as categorizing expenses.

Session 3: Advanced Live Use Cases (1:45 PM - 3:45 PM)

- **Topic: Real-World Scenarios and Solutions**
  - **Live use cases**:
    - **Use Case 1: The Escalated Client:** A client is demanding a refund and refuses to provide the necessary documentation. Participants practice responding professionally while adhering to company policy.
    - **Use Case 2: The Inaccurate Report:** A financial report submitted by a shared service centre contains errors. Participants must draft an internal communication to the team and an external communication to stakeholders.
    - **Use Case 3: The Cross-Functional Project:** A new expense management system is being implemented. Participants practice communicating requirements and managing expectations between the finance, IT, and HR teams.
  - **Activity:** Small group simulations of the above use cases with detailed feedback and coaching.

Session 4: Action Planning & Workshop Conclusion (4:00 PM - 5:00 PM)

- **Topic: Applying the Knowledge**
  - Developing a personal action plan or a cheklist for implementing workshop takeaways.
  - Q&A session to address any remaining questions.
  - Wrap-up and feedback collection.
  - **Activity:** Ask each participant to prepare a client-ready email or script summarising a call.
  - **Activity:** Implement real-time feedback mechanisms, like quick surveys or interactive polls, to tailor sessions dynamically based on participants' evolving needs.

Pre Workshop: To cater different needs of Fresher and Experiences Professionals

- Include self-assessment forms that help tailor separate exercises during the session.

Post Workshop: For Long Term Engagement

- Create follow-up modules or an online platform for continuous learning and discussion to maintain momentum and facilitate deeper understanding.
- Provide resources for continued learning (e.g., free online courses, articles).