Voice of the PCS: What Practicing Company Secretaries Really Need from Technology and How AI is Beginning to Answer?

This article presents findings from qualitative discovery conversations with Practising Company Secretaries (PCS), as part of exploratory research into technology adoption patterns in independent secretarial practice. The conversations reveal three persistent challenges: the burden of manual document generation, the fragility of knowledge transfer to interns, and the absence of structured client communication systems. Against this backdrop, the article examines how Artificial Intelligence and emerging no-code tools are beginning to address these gaps, not as distant promises but as accessible, deployable solutions available today. It maps each pain point explicitly to relevant AI-based responses and concludes with practical, step-by-step guidance for PCS on how to begin engaging with these tools meaningfully, including concrete examples of effective prompting for common secretarial documents.

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INTRODUCTION

The Practising Company Secretary occupies a unique position in India's corporate governance ecosystem. Unlike their counterparts in employment, the PCS operates independently, managing a diverse portfolio of clients across industries, geographies, and compliance profiles. Each client brings its own rhythm of board meetings, statutory filings, regulatory updates, and documentation requirements. The PCS is, in effect, running a small professional services firm, often with a lean team of interns and junior staff, while simultaneously maintaining the quality standards that governance demands.

It is a profession that has historically relied on expertise, relationships, and hard work more than on technology. The tools available to PCS have evolved slowly: a compliance tracking software here, a task management spreadsheet there, and the ever-reliable Microsoft Word for documentation. Meanwhile, the regulatory landscape has grown more complex, client expectations have risen, and the pool of well-trained secretarial talent has remained constrained.

Into this environment, Artificial Intelligence has arrived, not with a single dramatic announcement but through a steady accumulation of accessible tools that are quietly beginning to change what is possible for the independent professional. The question this article seeks to answer is a practical one: are these tools actually addressing the problems that PCS face on the ground, and if so, how should the practising professional begin to engage with them?

India's broader digital transformation agenda, reflected in initiatives such as the *MCA21 3.0 portal, Udyam registration,* and the increasing move toward electronic filings across regulatory bodies, signals that the environment in which PCS operate is itself becoming more technology-dependent. The practitioner who waits for perfect tools to arrive may find that the profession has moved on without them.

ABOUT THIS ARTICLE

The observations in this article draw on the author's direct conversations with Practising Company Secretaries. These conversations were exploratory in nature and are presented here not as statistically representative findings but as illustrative insights from practitioners navigating real operational challenges. The patterns that emerged across these conversations were consistent enough to warrant documentation and reflection for the broader professional community. All practitioners who contributed to these conversations have been anonymised.

THE CURRENT TECHNOLOGY LANDSCAPE: WHAT PCS ARE ACTUALLY USING

Across the conversations, a fragmented picture emerged. Software usage varied widely across practices:

- Dedicated compliance platforms for XBRL processing and statutory registers.
- Standard productivity and billing tools for correspondence and invoicing.
- Task management tools used primarily for attendance rather than workflow.
- Excel spreadsheets and institutional knowledge in practices using no dedicated software at all.

This fragmentation is not a reflection of indifference to technology. It reflects, rather, the absence of a single tool that adequately addresses the full spectrum of a PCS' needs. As one respondent put it directly: *"I need one single software for doing all the secretarial work, documentation creation, sending it to the client, and everything in between."* The market has offered vertical solutions, a filing tool here, a billing tool there, but nothing that integrates the end-to-end workflow of a practising firm.

Pricing sensitivities were also consistent. Respondents who were familiar with existing platforms cited annual costs ranging from Rs.10,000 to Rs.35,000, with one describing a competing platform's pricing of Rs.35,000 per year as prohibitively high for the value delivered. This price consciousness reflects the economic reality of the independent PCS, who absorbs software costs personally and must weigh them against tangible productivity gains.

Team structures across respondents ranged from sole practitioners to firms with over twenty-five interns and multiple partners. This range matters because technology needs scale with team size in ways that are not always obvious. A sole practitioner's challenge is personal efficiency; a multi-partner firm's challenge is coordination, accountability, and knowledge governance.

THREE PERSISTENT PAIN POINTS

While each respondent brought a unique operational context to the conversation, three pain points emerged with striking consistency.

1. **The Burden of Manual Document Generation**

   Minutes of board meetings, notices, agendas, attendance sheets, and statutory forms all require careful drafting that adheres to prescribed formats. The process is time-consuming and leaves significant room for clerical error, particularly when interns are responsible for the first draft. Common expressions from respondents included:

   - Generation of minutes described as "very time-consuming".
   - Aspiration for technology that could automate drafting while maintaining format integrity.
   - Specific requests for board report auto-filling as a priority feature.

   The pattern was consistent: documentation is the most labour-intensive part of the practice and the area where technology assistance would be most immediately valuable.

2. **The Fragility of Intern Knowledge Transfer**

   Every respondent who managed a team of interns identified intern training and knowledge retention as a significant operational burden. When an intern leaves, they take with them not just their labour but the institutional knowledge of the clients they served: the history of each company, the preferences of each Board, the nuances of each filing. Specific observations included:

   - Partners spending significant personal time explaining client histories to each new intern.
   - Bandwidth described as "choked" by the need to supervise interns lacking sufficient secretarial knowledge.
   - A senior manager's departure leaving partners unable to track ongoing tasks and assignments.

   The common thread is a profession where *knowledge lives in people rather than systems,* and where that dependence creates recurring vulnerability.

3. **The Absence of Structured Client Communication Systems**

   Several respondents described a pattern in which client communication was either insufficiently tracked, delegated inconsistently to interns, or managed through a shared email inbox as a workaround for quality control. Notable observations included:

   - One practice maintaining a single email account for all interns to ensure continuity when interns left.
   - Desire for a client portal allowing document exchange, query management, and reminder automation.
   - The challenge of chasing clients for inputs, with one respondent exploring WhatsApp-based reminders while questioning ICSI peer review compliance.

   The communication gap is not merely an inconvenience. It is a source of missed deadlines, errors, and reputational risk.

WHAT PCS ARE ASKING FOR: THE EMERGING WISH LIST

Beyond the pain points, the conversations surfaced a coherent set of aspirations. These were not abstract feature requests. They were grounded in the daily frustrations of professional practice. The asks clustered around four themes:

- **AI-enabled content generation:** A tool that could draft minutes, notices, board reports, and statutory documents in the correct and proprietary formats based on structured inputs. One respondent explicitly requested this and described it as their primary technology ask.
- **Smart validation for MCA filings:** Validation that would flag conflicting director meeting times across companies, and guidance on correct MCA form selection based on the nature of the transaction.

- **Client portals and structured communication:** A governed environment where clients could upload documents, respond to queries, and receive automated reminders, without involving interns directly in sensitive communications.
- **Workflow systems that carry institutional knowledge:** A system that would onboard a new intern to a client's history and requirements without the partner having to explain it personally each time.

HOW AI TOOLS ARE BEGINNING TO ANSWER

The aspirations described by respondents are no longer speculative. A new generation of AI-native tools is making meaningful inroads into exactly these problems. What is particularly significant is that many of these tools are accessible to practitioners who are willing to invest a modest amount of time in learning how to use them effectively.

For the document generation challenge: Large Language Model (LLM)-based tools can now draft minutes, notices, and statutory documents from structured inputs with a level of quality that, while requiring review, dramatically reduces the time needed for first-draft creation. Tools such as Microsoft Copilot, Google Gemini, and standalone AI writing assistants can be prompted with specific secretarial requirements and produce compliant draft output in seconds. The practitioner's role shifts from drafting to reviewing and refining, a significantly more efficient use of expert time.

> The profession has always been defined by its commitment to accuracy, governance, and trust. AI tools, used thoughtfully and with appropriate human oversight, do not threaten those values. They extend the capacity of the individual practitioner to uphold them at greater scale and with greater consistency.

Beyond text generation, integration platforms such as *Make and Zapier* now allow practitioners to connect their existing tools: client data entered through a structured form can be automatically pulled into a Word or Google Docs template, generating a populated document without manual re-entry. This kind of lightweight automation does not require software development skills and is available to any practitioner willing to experiment.

For the intern knowledge transfer challenge: AI tools can now assist with the creation of structured training materials, client onboarding documentation, and procedure guides that capture institutional knowledge in reusable form. A well-prompted AI system can help a PCS partner document their firm's client history, standard operating procedures, and compliance checklists in a structured format that an intern can follow independently. Tools such as Notion and Google Sites, augmented with AI-drafted content, can serve as living knowledge bases that grow more useful over time rather than resetting with each personnel change.

For the client communication challenge: AI-assisted drafting tools can help interns produce client-facing correspondence that meets the quality standards of the partner without requiring the partner to draft every communication personally. Reminder workflows can be automated through simple no-code tools. Combined with a structured client portal, this creates a governed environment in which interns can act within defined parameters while the partner maintains oversight.

On the broader opportunity for PCS as builders: The emergence of no-code and low-code development platforms such as Bolt, Lovable, and Replit now allows professionals to build functional software prototypes including custom document generators, client portals, and workflow trackers, using plain language instructions rather than traditional programming. This article built a functional AI-powered document generation prototype as a personal research exercise using precisely these tools, confirming that the barrier to building practice-specific technology has fallen meaningfully for practitioners willing to experiment.

This is a significant shift. Historically, the profession has been a *consumer* of technology built by others, often imperfectly matched to secretarial requirements. The emergence of accessible AI development tools means that a practitioner who understands their own workflow deeply, which every PCS does, can now participate in *building* the tools that serve it. The expertise gap between the professional and the technology builder has narrowed substantially.

THE INDIA-SPECIFIC GAP: WHAT GLOBAL AI TOOLS DO NOT YET ADDRESS

While the tools described above represent genuine progress, an honest assessment must acknowledge that most AI platforms were built for global markets and do not natively understand the Indian regulatory environment. This creates a specific gap that the PCS community and India's technology ecosystem will need to address together.

Three areas where the India-specific gap is most pronounced:

- **MCA compliance and form structures:** Current AI tools do not fully understand MCA form structures, the specific validation requirements of the Companies Act, 2013, or the procedural nuances of SEBI compliance filings. A tool that drafts minutes without knowledge of ICSI secretarial standards, or fills forms without awareness of MCA-specific validation rules, can produce output that is plausible in appearance but non-compliant in substance.
- **Legal terminology and localisation:** India's corporate governance documentation draws on terminology, abbreviations, and procedural conventions that are specific to Indian company law. AI tools trained

primarily on global corpora may not reliably reproduce the precise language expected in statutory documents, board resolutions, or compliance certificates.

- **End-to-end filing integration:** No current AI tool integrates natively with the MCA portal end-to-end. Manual intervention at the filing stage remains necessary regardless of how well upstream documentation has been automated.

There is, therefore, a meaningful opportunity for India-specific technology builders to create tools that are natively compliant with the Indian regulatory framework. The practitioner community has a role to play here as well: by articulating their requirements clearly, engaging with technology providers, and contributing to the development of India-specific templates and training data, PCS can help shape the tools that will eventually serve them.

A NOTE ON WHAT AI CANNOT YET DO

Intellectual honesty requires acknowledging the limitations of current AI tools alongside their possibilities:

- **Expert review remains non-negotiable:** AI-generated documents can produce plausible but incorrect output, particularly on nuanced regulatory questions. The practitioner cannot outsource professional judgement to an AI system and remain compliant with ICSI standards.
- **End-to-end automation is not yet possible:** The workflow from client instruction through document generation to statutory filing cannot yet be completed without manual intervention at the filing stage.
- **Subscription costs are real:** Meaningful professional usage of advanced AI platforms carries monthly costs that must be weighed against productivity gains.
- **Data privacy requires active attention:** Practitioners must be thoughtful about what client data is shared with external AI platforms and should review privacy terms carefully before using any tool professionally. The Digital Personal Data Protection Act, 2023 (DPDP Act) and the DPDP Rules, 2025, notified in November 2025, establish India's first comprehensive framework governing the processing of personal data, with full substantive compliance required by 13 May 2027. Practitioners who use cloud-based AI tools for client work should assess whether their usage constitutes processing of personal data under the Act and take appropriate steps to ensure compliance.

PRACTICAL GUIDANCE: WHERE TO BEGIN

For the PCS who are curious about AI tools but uncertain where to start, the following four-step approach offers a structured, low-risk entry point. The key principle is to begin small, evaluate honestly, and expand only what works.

Step 1: Begin with document drafting on a low-stakes task

Choose a routine document, such as a notice of board meeting or a covering letter, and attempt to generate it using a freely available AI writing tool such as ChatGPT, Google Gemini, or Microsoft Copilot.

The quality of output depends critically on the quality of the prompt. Prompt engineering, defined as the practice of structuring instructions to elicit precise, useful outputs from AI systems, is a skill that improves with deliberate practice. Leading AI providers including OpenAI and Google have published detailed guidance on effective prompting techniques, emphasising the importance of specificity, context, and role assignment in constructing effective instructions. Consider the difference between these two approaches:

Weak prompt: *"Draft a notice for a board meeting."*

Strong prompt: *"Draft a formal notice for a Board of Directors meeting of a private limited company incorporated under the Companies Act, 2013. The meeting will be held on 15th June 2026 at the registered office in Chennai. The agenda items are: approval of the annual financial statements, declaration of an interim dividend, and any other business with the permission of the chair. The notice should be in the format prescribed by ICSI secretarial standards and should be signed by the Company Secretary."*

The difference in output quality between these two prompts is significant. The discipline of writing precise prompts is itself a transferable skill that will improve across all AI interactions.

Step 2: Build a prompt library for common secretarial documents

Once a well-structured prompt has produced a satisfactory output for a given document type, save it. Over time, build a library of reusable prompt templates: one for minutes, one for notices, one for board reports, one for compliance certificates. This library becomes a practice asset that improves efficiency and consistency across the firm. Interns can be trained to use the prompt library rather than drafting from scratch, reducing both error rates and supervision burden.

Step 3: Explore lightweight automation for client data collection

A simple workflow using Google Forms or Microsoft Forms to collect client inputs, connected to a document template through an integration tool, can eliminate significant manual effort. The client fills a structured form. The responses populate a document template automatically. The PCS reviews and approves the output. This is not a complex technical implementation. It is a workflow design exercise, and the AI tools available today can guide the practitioner through it step by step.

Step 4: Create a basic internal knowledge base

A structured internal knowledge base, maintained diligently in a shared drive or documentation platform, reduces intern onboarding time, protects the firm against knowledge loss when team members change, and creates a foundation for more sophisticated AI-assisted workflows. Client histories, standard operating procedures, and compliance checklists can all be documented with the assistance of AI drafting tools and stored in a central, accessible location.

What makes this particularly powerful today is that the knowledge base itself can become queryable using AI. Google Drive, for instance, now supports AI-powered search and summarisation through Google Gemini, enabling practitioners to ask questions of their stored documents in plain language and receive synthesised answers drawn from across their files. A partner who has stored client histories, SOPs, and compliance notes in Google Drive can ask: *"When was Director X appointed on the board of Company ABC?"* and receive a summarised response drawn from their own documents. This transforms the knowledge base from a static repository into an active, queryable resource, one that reduces dependence on individual memory and makes institutional knowledge genuinely accessible to every member of the team.

CONCLUSION

The conversations underlying this article reveal a profession that is technically underserved relative to the complexity of the work it performs. The tools PCS use today were not designed with their specific workflow in mind and do not adequately address the three challenges that matter most: document generation, intern knowledge transfer, and client communication management.

The arrival of AI tools and accessible development platforms represents a genuine opportunity to address this gap. The tools exist. The barrier to using them is lower than many practitioners assume. And the competitive advantage available to the PCS who engages with them early is meaningful, particularly as the regulatory environment continues to move toward greater digital integration.

The India-specific gap is real and should not be minimised. Global AI tools will need adaptation to serve the Indian compliance context reliably, and that adaptation will require the active participation of practitioners who understand the domain. The PCS community is uniquely positioned to contribute to this process, not merely as users of technology but as informed voices in its development.

The profession has always been defined by its commitment to accuracy, governance, and trust. AI tools, used thoughtfully and with appropriate human oversight, do not threaten those values. They extend the capacity of the individual practitioner to uphold them at greater scale and with greater consistency. The question for the practising community is not whether to engage with these tools but how to do so wisely.

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