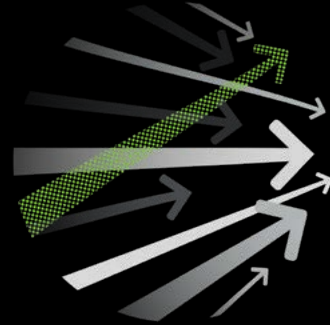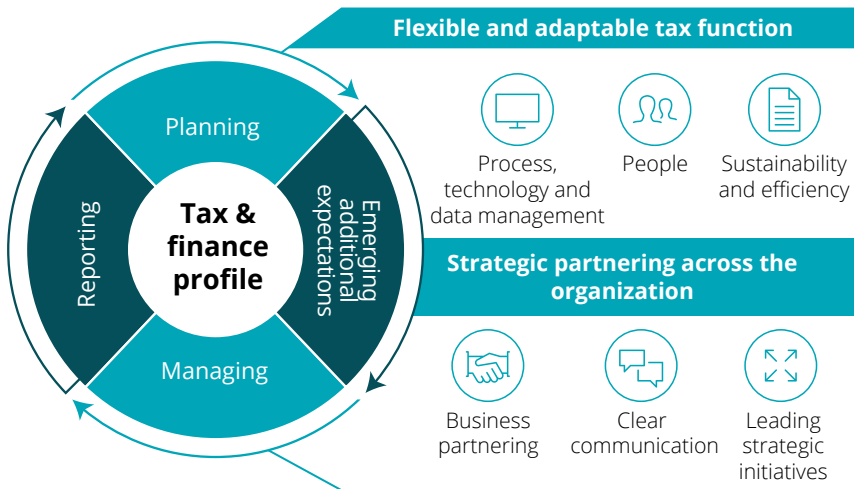# Deloitte.

Tax Management Consulting
Transformation starts here

Deloitte's Tax Management Consulting (TMC) practice helps organizations transform their tax functions to be efficient, transparent and closely aligned with their business strategy. We help to optimize the architecture of the tax function to enhance the value tax brings to the organization.

Expectations of tax

Flexible and adaptable tax function

Process, technology and data management | People | Sustainability and efficiency

Strategic partnering across the organization

Business partnering | Clear communication | Leading strategic initiatives

Tax & finance profile — Planning, Emerging additional expectations, Managing, Reporting

Derived from over 700 Deloitte stakeholder interviews, including CFOs, in preparation for Deloitte Tax Executive Transition Labs™.

Value drivers of a tax function

Enhanced operational efficiency

Strategic partnering

Improved risk management

Deloitte tax transformation methodology

Assess

Assessment of current tax operating model

Assessment of the tax operating model across various areas of tax, considering governance, people, processes, data and systems.

Identify

Identification of improvement recommendations

In-depth review of the current tax activities of the key priority areas identified during the Assess Phase. Findings are documented and compared with best practices to identify gaps and recommend improvement opportunities.

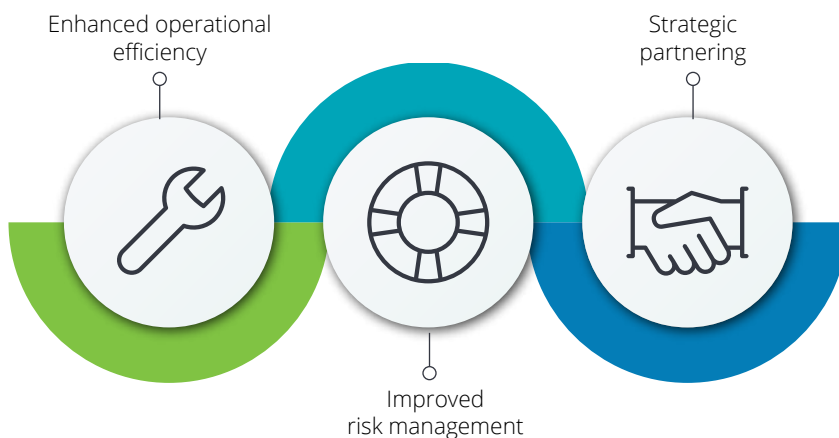### Implement

Implementation of recommendations

For recommendations agreed to by management, develop and implement the required processes, procedures and tools.

Monitor

Monitoring

Following development and implementation of the agreed upon processes, procedures and tools, roll out and transition through communication and training. This includes ongoing monitoring activities.

Tax Management Consulting
Service offerings

Tax organization and operations consulting

- *Tax transformation labs.* A one or two-day, live, interactive and facilitated session that helps functions prioritize initiatives and accelerate the transformation of a tax department.

- *Tax operating model assessment.* A one-day workshop to develop an initial assessment of the current state of tax governance activities, using an innovative tax risk assessment tool.

- *Tax function organizational design.* Assessment of the tax function in terms of strategic drivers/requirements, and current organizational and reporting structure. This can include a cost-benefit analysis for outsourcing/co-sourcing various tax activities.

- *Tax governance framework.* Development of a tax policy and framework covering overall tax guiding principles in an organization, providing standards for key activities, defining responsibility and accountability, detailing guidance on how key decisions are made and supporting overall tax risk management of the organization.

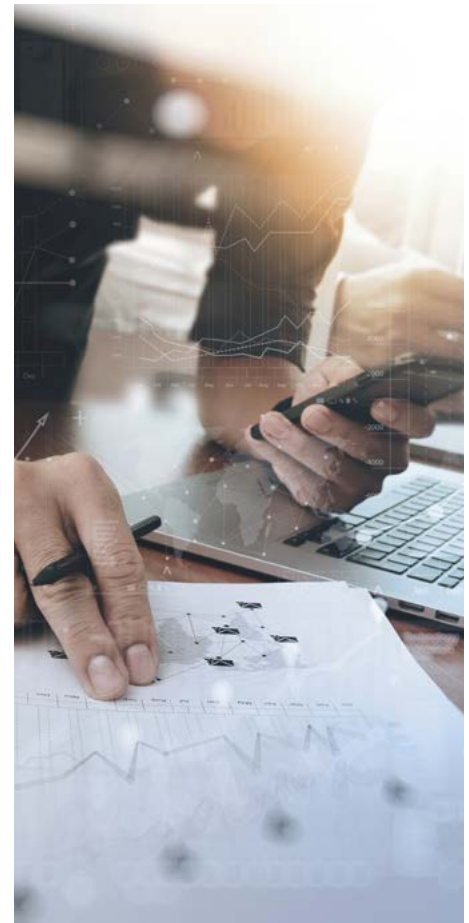## Tax technology & process

Process review and automation

- **Tax process review** – Assessment and development of current tax planning, accounting and compliance processes to identify a more efficient and value-driven set of processes.

- **Robotic process automation (RPA)** - Design and implementation of software code to automate manual, rule-based, repetitive tasks that humans perform within the tax function, to improve processing efficiencies and reduce human error and operating costs within tax departments and across the entire organization.

- **Tax-enabled enterprise systems**

  - *Enterprise resource planning* - Integration and alignment of enterprise and tax systems/processes to simplify and streamline data collection and management processes.

  - *Enterprise tax integration* - Automation of transactional determination of indirect taxes (VAT, GST, US Sales & Use Tax, etc.) through enhancement of ERP systems and/or indirect tax software configuration.

  - *Direct tax automation* - Assessment, vendor selection, design and implementation of tax software for automation of corporate income tax compliance and provision processes.

Tax data management and analytics

- Design and implementation of tools for timely collection, consolidation, transformation and validation of tax data in an automated and streamlined fashion.

- Design of centralized tax data management infrastructure.

- Development of visualizations to analyze data for tax benchmarking and analytics.

Tax portal (myInsight)

- Global visibility of tax and legal obligations, organization and management of tax processes and resolution of complex data issues using portal and database technology.

Contacts

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