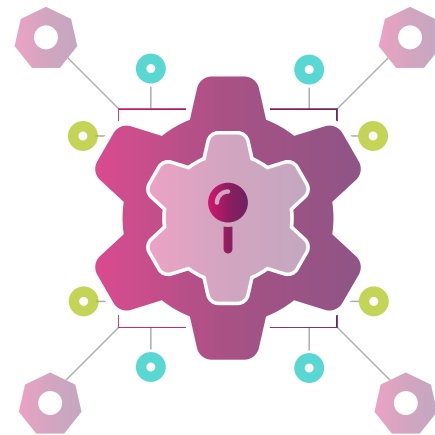


Tax Technology Services

Transform the way your business manages tax with robust, refined and future-proofed technology for your ERP delivered by our team of experienced, certified tax technologists



Tax Technology
Services

Introducing our Tax Technology Practice...

Our Tax Technology Practice is the perfect partner for businesses striving to achieve accurate, compliant and automated tax determination and reporting outside of native ERP solutions.

Whether you're planning a tax engine implementation, seeking to integrate a compliance solution, aiming to create business efficiency and audit defence, or you're simply unsure of your next step and you need a helping hand, you've found the right place.

All our services are delivered with Tax and IT teams in mind; we'll show you the art of the possible and save you time, money and resource bandwidth at every stage via our Real Results Right Away methodology.

Here are just some of the benefits of partnering with our Tax Technology Practice:



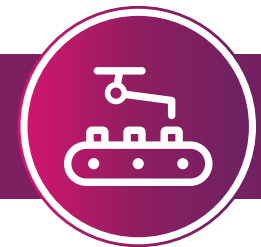
One global, agile team - the largest dedicated tax tech delivery team under one roof in Europe!



Award-winning tax tech solutions for businesses trading across multiple jurisdictions



We translate each client's requirements into the best configuration of their chosen tax systems



A comprehensive range of products and services that deliver real results, right away

We partner with the best to enable us to deliver the best

ORACLE

SAP

Avalara

VERTEX

alteryx

THOMSON REUTERS
ONESOURCE

SOYOS

How we can help

Wherever you are on your tax transformation journey - from planning an ERP migration to experiencing mid-project turbulence, preparing for e-invoicing mandates or readying your business for expansion into new territories - our Tax Technology Practice is here to help.

We partner with all leading technology vendors and have a large team of consultants ready to deliver your optimum tax configuration.



Software implementation



Tax technology assessment



System optimisation



Tax technology selection



Tax technology support



Building your business case

Driving tax forwards for global clients

Since being founded in 2012, we've helped many of the world's largest businesses to implement, configure and optimise the best technology on the market; delivering automated determination and reporting in 160-plus countries across six continents in the process!

We pride ourselves on taking a pragmatic approach to help our clients transform the way they manage indirect taxes through the use of technology, while de-risking their operations through the use of automation.

Our ambition is always to deliver best-in-class solutions that are expertly optimised to ensure long-term success, including cost-effectiveness, vast time savings, and a fully future-proofed setup.

Our Tax Technology Practice is trusted by dozens of global clients, including:



Tax solution reviews

Are you ready for new technology?

Before you invest in new solutions or products, allow us to give you a fresh perspective.

We offer a comprehensive solution review service, allowing us to meet with different areas of your business and scrutinise your current setup to fully understand your existing processes, available technology, and future requirements.

You will receive a comprehensive report with a risk indicator score against each focus area. The report will provide you with much needed clarity on just how effective your current systems and processes truly are.

Depending on the report's findings, we'll also make recommendations for improvements in the short and long-terms to reduce the burden of tax compliance on your business.

Our solution reviews typically follow a two-stage process:

STAGE 1

We'll begin by exploring your existing tax solution in exceptional detail in order to understand how it works, how strong (or not) its current performance level is, and where all its risks or limitations lie. We'll report back to you to share our findings of your current state.

STAGE 2

In the second phase, our experts will ascertain which efficiency gains can be made and advise on your potential future state requirements. Depending on the results, we'll recommend a compliance solution, a tax engine or a reconfiguration of your current setup. No two reviews are the same!

Tax technology selection

Need new tax technology but you're unsure which vendor or product is the perfect fit for your business?

While all leading tax technology boasts extraordinary functionality, not every product will deliver on your requirements and ambitions.

While one organisation may require a tax engine with robust connectors and interfaces into other financial systems, another may prioritise a system that allows them to easily manage tax in a particular jurisdiction - and the strengths of each product aren't always immediately obvious.

Whatever your company's non-negotiables are, our expert consultants will collaborate with your Tax and IT teams to understand your requirements.

VENDOR SELECTION PROCESS

1

REQUIREMENTS WORKSHOPS

The first step is to assess your existing tech, processes and objectives.

2

REQUIREMENTS RATIFICATION

We'll share findings from Step 1 and translate them into software requirements - evaluating each vendor's suitability against your needs.

3

VENDOR ASSESSMENT

Vendors are introduced. We'll arrange demos and help you to prepare the right questions to ask.

4

OUR RECOMMENDATION

We'll share an executive summary, including strengths and weaknesses of all vendors. We'll also create a roadmap to your optimum implementation.

Tax engine implementations

We are the global experts in **tax engine implementations**.

With unrivalled experience of Vertex, ThomsonReuters OneSource, Sovos, Avalara, and our very own industry-leading inFlyte solution exclusively for Oracle ERP users, our dedicated implementation team will ensure your project is delivered successfully.

We have the skills and knowledge required to configure any leading tax engine or tool in the optimum way to deliver on client objectives.

Our proven methodology and proprietary content assures accurate, automated tax determination.

And what of the future? Our commitment to clients doesn't end when a project hits go-live.

We'll continually maintain your solution so that you can be confident that you'll always generate the right tax treatment, whatever business changes may emerge, e.g. new product additions, tax changes etc.

We engage tax engine implementations with a very clear model.

1

Tax requirements are front and centre of every conversation - we don't hide from them!

2

We never offshore the delivery of a project.

3

A personal touch; you'll deal with the same consultants from discovery to go-live.

4

Our deep knowledge of tax engines and their respective capabilities is key.

5

We'll always offer an unbiased recommendation on the right engine to meet your needs.

What makes us unique?

Our unique project methodology has a proven track record of success spanning more than 100 implementations over the last 15 years.

We understand exactly what's required to deliver a successful, future-proofed implementation because we run each project in the same way and our methodology is designed to combat every possible obstacle.

We're extremely proud that our methodology is underpinned by a portfolio of Innovate-exclusive processes, systems and solutions; combining to allow us to achieve greater results in a fraction of the time of other providers.

Take a look at some of the features that make an Innovate project truly unique, and on the next page discover our accelerators that enable us to implement a tax solution faster than any other partner.

BUILDING A HYBRID MODEL

Through the range and depth of our partnerships with leading tax technology providers and the skills and agility of our Functional Consultants, we're capable of delivering a hybrid approach to tax.

That means if your business selects, for example, Oracle for AP and Vertex for AR, we can deliver, optimise and support your entire setup from inception to completion.

Our key strength is our pragmatism, which allows us to adopt a truly impartial position and use our experience and expertise to not only select and invest in the right technology for your business, but also to configure it in the optimum way.

REVERSE ENGINEERING

Where many partners ask 'What does your tax solution need to be?', we take a proactive approach that removes the burden on your team and allows us to narrow down on your specifications and requirements faster.

We leverage the Alteryx data analytics platform to reverse engineer the requirements gathering stage of your project; analysing your previous transactional data to identify key tax scenarios and accelerate to the areas of the solution that most require our expertise.

POWERED BY
alteryx

Project accelerators

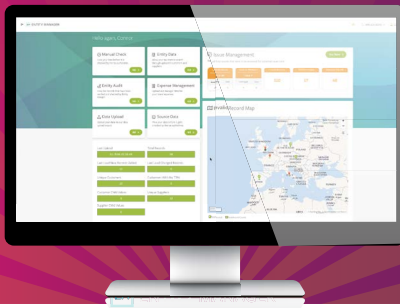
The quality of our work, the experience of our tax technologists and the care we put into your project help to set us apart from other partners. We also stand out from the crowd by deploying **three unique accelerators** - each designed and developed by our team - to take your project from zero to 100 faster than any other partner.

1

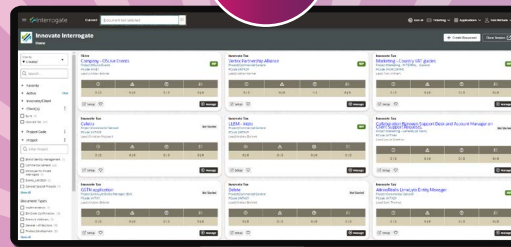
ENTITY MANAGER

LimeLyte Entity Manager is our award-winning tax master data tool.

We deploy LimeLyte Entity Manager to run a healthcheck on your existing master data. The platform scrutinises and reports on your master data to ensure your new solution is fuelled only by accurate, complete data.



2



interrogate

Innovate Interrogate is our exclusive project management platform.

It helps to propel each project forwards by sharing agreed workflows, removing 'unknowns', creating an all-party audit facility, translating client requests into actions, and

3

RAPIDINSTALL™

RAPIDINSTALL™ is our unique accelerated delivery methodology for Oracle. It allows us to speed up any implementation with no loss of precision or power.

With RAPIDINSTALL™, we can deliver:

- 1 A global tax solution ready to test in just 48 hours
- 2 A turbocharged project, speeding through the testing phases.
- 3 More time to focus on bespoke elements

Why work with us?

Whether your roadmap is clear or you're currently unsure how to move forwards, we can help you to achieve a best-in-class tax setup.

As tax technologists, all our configurations are designed with tax professionals in mind; ensuring optimum accuracy, speed, and compliance in every transaction, while helping your business to save time and money.

Get in touch to find out more about how we can help.

We will save you **TIME** at every stage of the project

We achieve this through speed of delivery, maximising the power of our methodology and accelerators.

We will save you **MONEY** so your budget goes further

We know the fastest approach to implement a solution in Oracle, so unnecessary billing is low risk.

OUR CREDENTIALS



One core team of consultants with 100+ years of experience



Delivered tax solutions in 150+ countries worldwide



End-to-end services, including master data cleansing and support desk



13 years' experience of working with all major ERPs, solutions and systems



Partners with all leading tax tech solution providers

Partner testimonials

"I have seen Innovate Tax first hand work with customers to help them navigate through the solutions and claims of third-party vendors.

I have been impressed by **Innovate's customer-centric approach**, always looking to help clients get the best out of what is available in the market and to help them drive towards solutions that are the best fit for their world."

Andy Hallsworth
Solution Engineer



"I can't recommend the team at Innovate Tax highly enough.




They have really nailed delivery at a global level, with **mastery in both ERP and tax engine configuration** for indirect tax automation across all business processes.

When I send customers their way, the Innovate team always makes good on their promises."

Troy Fischnaller
Senior Solutions
Consultant



Reference projects

	<p>Client: Versuni</p> <p>Source ERP: SAP</p> <p>Industry: Consumer goods</p> <p>Project type: Implementation</p>	<p>In 2021, Versuni embarked upon a project described as the largest of its kind in any industry. Covering 55 countries, it included an ERP migration and implementation of a new tax engine accelerator. We were selected</p>	<p>by implementation partner, TCS, to oversee the tax element of the project; our teams deployed the new tax engine technology and implemented the ERP tax setup to ensure Versuni's aims were met.</p>
	<p>Client: Zoll</p> <p>Source ERP: Oracle</p> <p>Industry: Medical</p> <p>Project type: Implementation</p>	<p>During this project, we were responsible for translating complex tax requirements into best-in-class solutions for Zoll. The medical company was migrating to a new ERP version and recognised that a</p>	<p>tax-specialist partner was required to deliver against Zoll's bespoke and complex tax scope. We created a global tax template and procured a leading tax engine system to ensure a successful outcome.</p>
	<p>Client: C Spire</p> <p>Source ERP: Oracle</p> <p>Industry: Telecoms</p> <p>Project type: Implementation</p>	<p>As part of a wider ERP implementation, we were selected to deliver all key tax components - including the design and setup of tax within the new ERP and the flow of data into the global ERP integrator. C Spire opted to</p>	<p>use a separate tax engine for North America, which were implemented and supported through the use of extensive documentation and critical cut over activities.</p>

Next steps

Interested in what you've heard so far? We'd love to discuss the next steps with you.



Get in touch

Email us at
info@innovatetax.com
to arrange a discussion.



Find out more

Visit our website at
innovatetax.com for more
information.

INNOVATE TAX

COMPLIANCE WITHOUT COMPROMISE

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