

MAKING A TAX TECHNOLOGY TRANSFORMATION PLAN WORK FOR YOU:

Your Own Individual Roadmap

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THE BEGINNING

Why and how did you start your journey with tax technology and digital transformation?





Maturity Stage - Where do you see yourself now?

Tax Data Automation Single Data Source, Structured Data – **Tax Processes** Medium Level of **Improvement** Automation

Tax Calculation and **Analytics**

> Insight in tax performed – Low Data Manipulation

Vision Stage

Detailed Tax Data Readily Available, Manual Processes are at a Minimum

Manual Tax Processes

Ad hoc Spreadsheet Calculations

Some Standardization and Limited Automation Required







Enhanced Efficiency and Accuracy

digitizing manual processes and integrating structured data sources.



Future-Proofing Your Skill Set

Embrace continuous learning. New skills not only elevate your role as a tax leader but also ensure your relevance in a rapidly evolving landscape.

How did this journey contribute to your professional growth?



Cross-Functional Collaboration

Implementing tax technology required close collaboration and alignment with IT, finance, and legal teams.



What are the main challenges today and lessons learned in your digital transformation

journey?

01

Challenges:

Data Quality and Accessibility
Process Complexity and Fragmentation (Silos)
Stakeholder Buy-In

02

Lessons Learned:

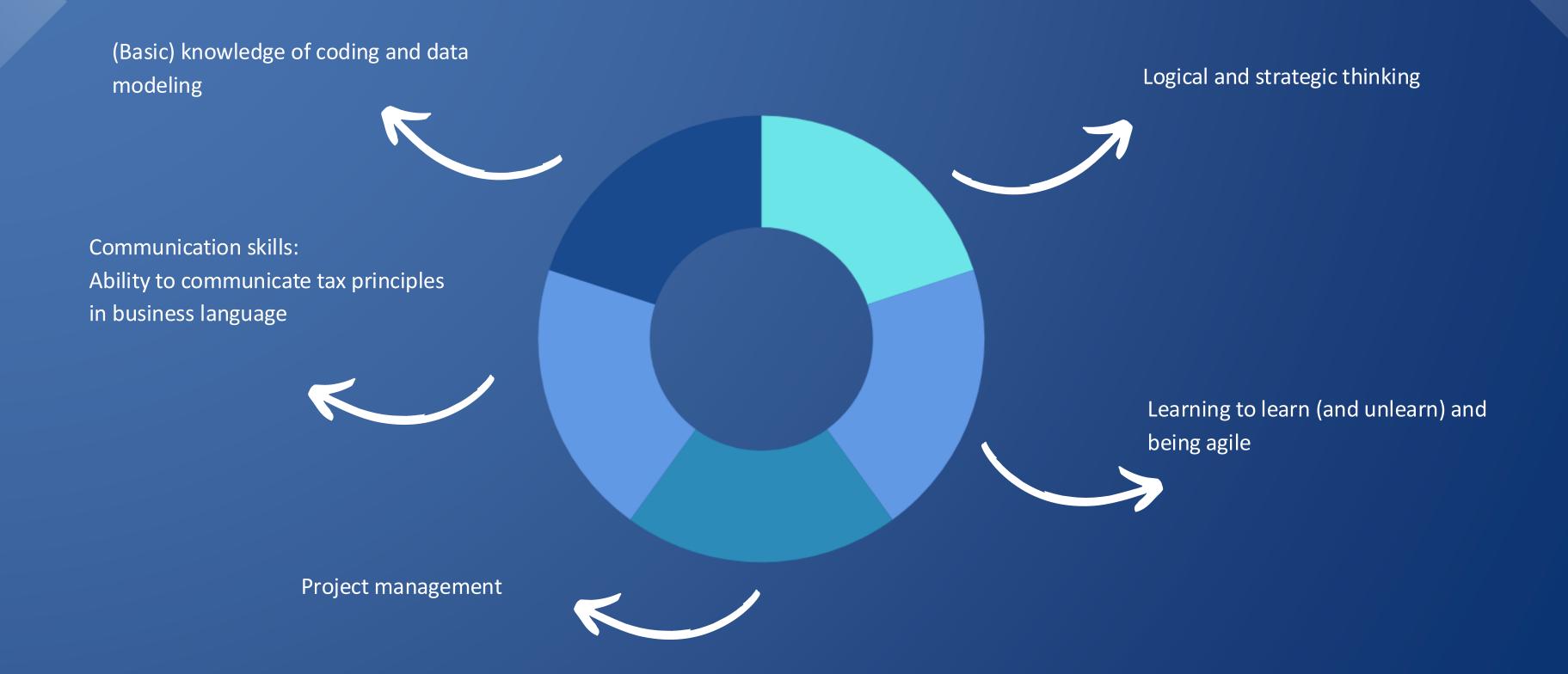
Start Small, Think Big
Understand Before You Automate
Collaboration is Key

What decisions did you made that changed the way of working in the tax department?





How do you assess your team's data and digital journey readiness?





NEXT STEPS

1

Build a Tax Transformation Plan
Define your Tax Vision
Understand Challenges
Identify Solutions
ROI (Investment vs Savings).

2

Assess your team's readiness

Make sure your team have the right
skills and competencies
Provide required upskilling/

3

Convince your stakeholders of the need for digital transformation for tax to stay relevant as tax department of the future.

