



The Key Role of Knowledge Management for Transformed Tax Functions

7 December 2023 – With Case Study



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Xyto Founder & Chief Taxologist



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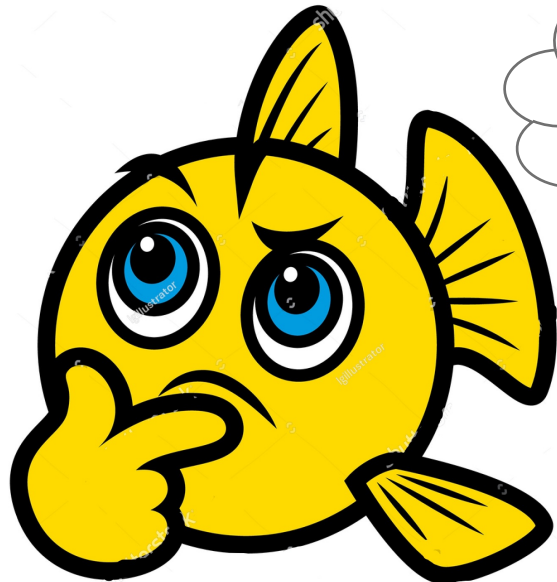
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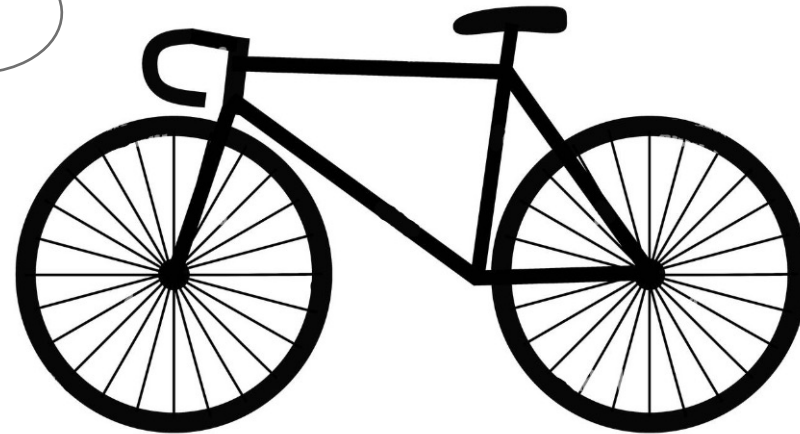


Tax Technology vs Transformation

- The tax digitalization problem cannot be fixed with technology alone
- If the people don't “get it”, it's a mismatch!



How am I going to get around quicker?





Transformation is ...

People, Process, Technology, and 'Data'

... not just technology alone ...

Where each component changes to work together as a whole in a transformed state.



But, what order do we address them in?

People, Process, Technology, and 'Data'

- People, process, technology, data
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Transformation Transition Steps

1. People – *Align to tech mindset and upskill*
2. Technology – *Complements upskilled humans*
3. Process – *Supports dynamic, tech-driven eco-systems*
4. Data – *Possible when the other three are in place.*

So, it starts with people ...

... and ends with them having accountability over tax data at source.

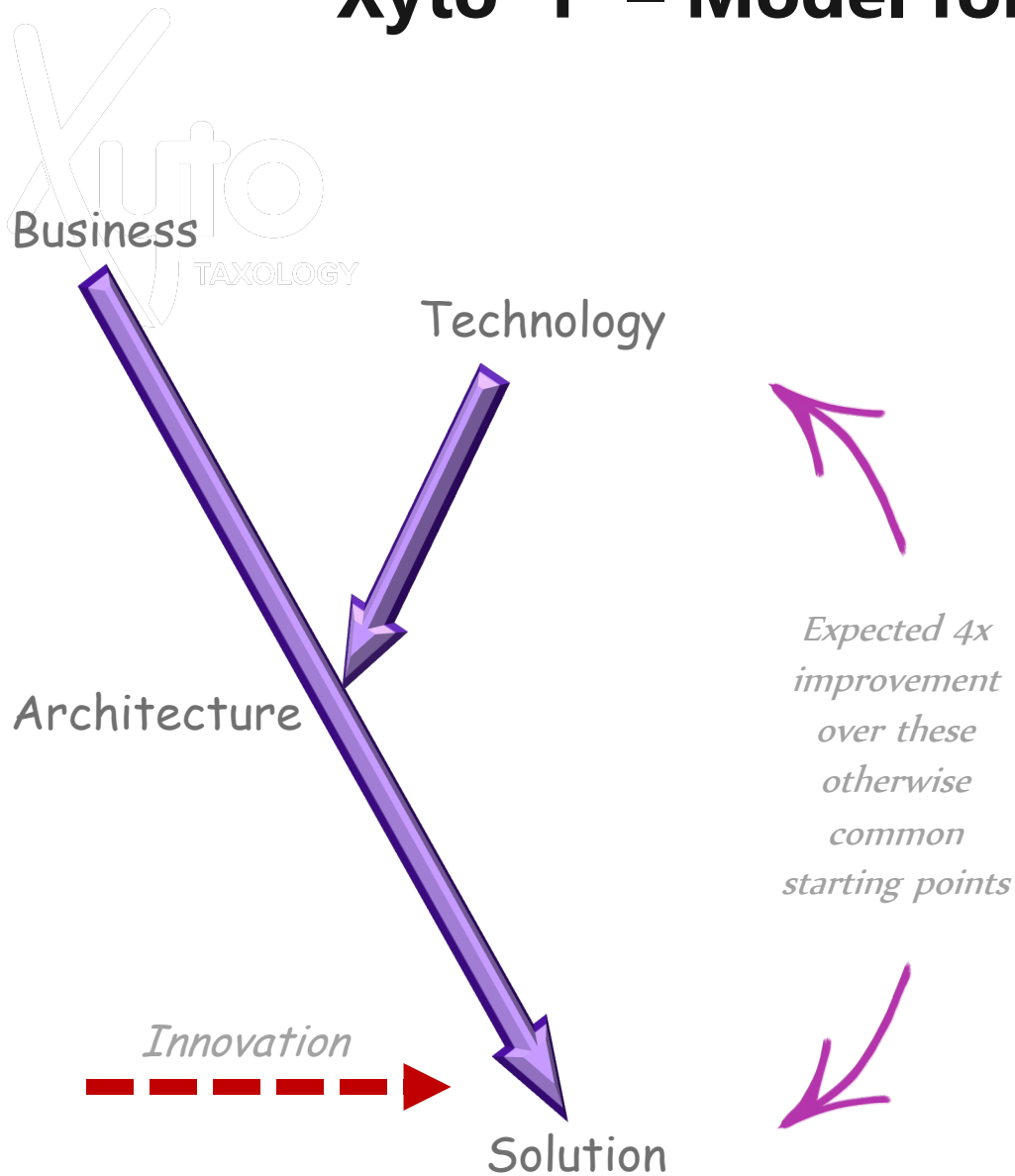


How and what should humans learn?

- Formal, academic
- Alone on the job
- Agile teams
- General skills
- Company (tribal) knowledge
- Technology & IT
- Digital eco-systems
- Technology leadership
- Digital solutions governance
- All of the above
- Most of the above

But, we have to start somewhere!

Xyto 'Y' – Model for Transformation Journeys



Explanation

Business elevated above Technology due to its greater importance
Business and Technology investigations commence independently
Architecture captures unanticipated and unforeseen opportunities afforded by uniting business vision with technological capability

Component break out

Business

Key Goals, Objectives, Metrics, Policies and high-level Business Flows

Technology

Knowledge & Understanding of available technologies, usage characteristics and implementation options

Architecture

The intersection of Business Capability Requirements with Technical Capability Options, yielding a functional Architecture Design – high-level Business Process, System Architecture Components & Relationships, Key Data Elements & Flow

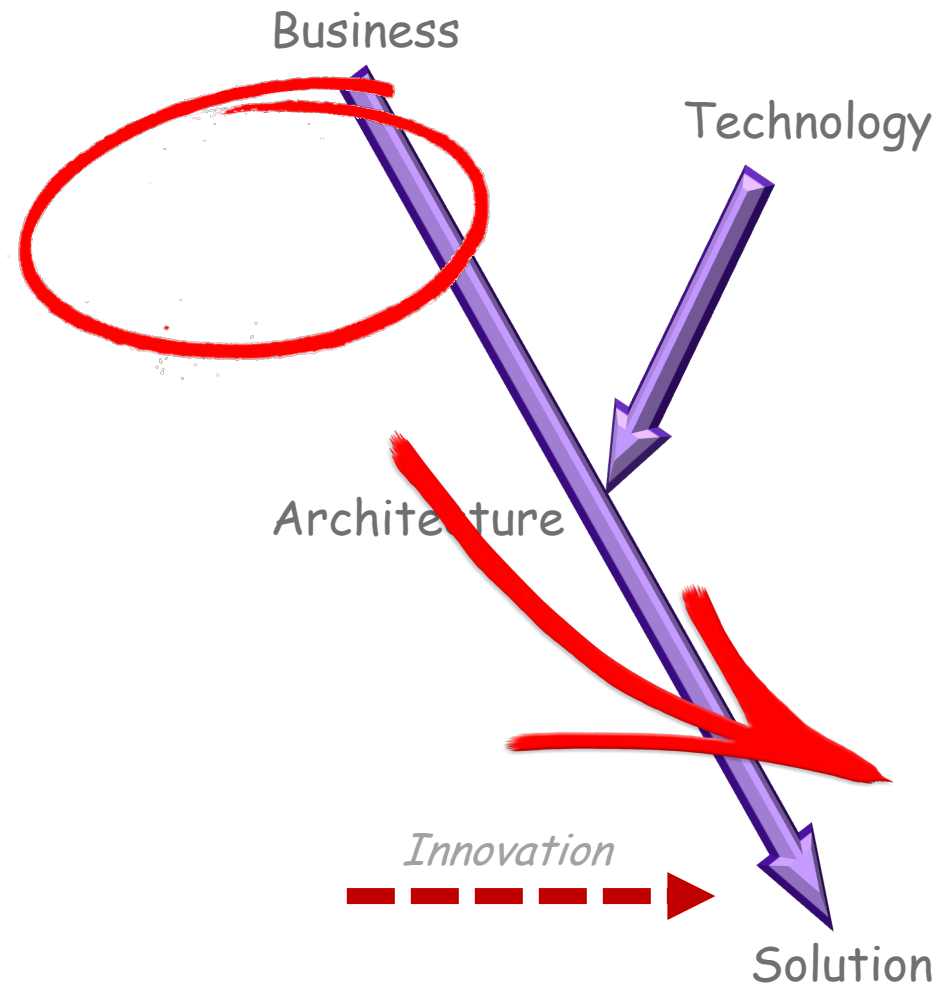
Solution

The integration of Business Policies, Processes and Technologies to achieve optimized business outcomes

Half the cost, twice the benefit. Why does it work?

- Incorporates and formalizes corporate strategy and goals
- Technology leveraged only within context of business aims
- Encapsulates & reduces technical effort, curtailing assumption & guesswork about true business intention
- Provides framework to set clear expectations

Xyto 'Y' – Model for Transformation Journeys





XytoBase

Tool for ground-up visibility & holistic control

What is Xyto Base

- Xyto Base is a comprehensive **Wiki Based Knowledge** management template hosted on Confluence.

What is Wiki-Style Knowledge Management?

- Collaborative platform that centralizes information.
- Embracing modern tech advancements:
 - User-friendly interfaces
 - Real-time updates and collaborative editing.
 - Advanced tagging and search functions.
 - Integrated cross-references.
- Goal: Real-time, unified source for comprehensive tax data.

- Designed with preloaded, crucial information: From transformation strategies to insights on main ERPs and top-tier tax tools.
- Built for customization: Adapt Xytobase to meet the unique needs and nuances of your company.

Demo & Case Study

FREE
TAX
KNOWLEDGE
BASE

EXCLUSIVE OFFER:

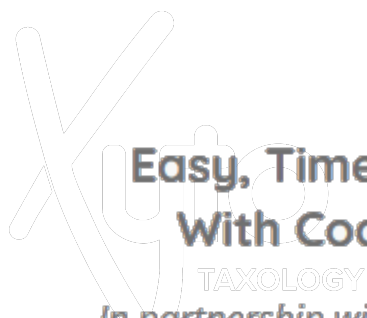
If you've been considering Xyto training for a while, the time really is now...

FREE Tax Transformation Knowledge Platform
with each new Smart TaxTech & Transformation registration!

TAX TECHNOLOGY CERTIFICATION

THE BELT SYSTEM





**Easy, Time-efficient Study Program
With Coaching and Certification**

TAXOLOGY

*In partnership with WU (University of Vienna) Tax Law
Technology Center and e-Bright belt system*



Accelerated Learning!

THE BELT SYSTEM



What gains or pain points might KM help you with?

- Seeking efficient ways to manage and access tax-related knowledge
- Needing to improve collaboration and knowledge sharing among tax professionals
- Looking for solutions to streamline tax processes and reduce errors
- Interested in enhancing compliance and regulatory reporting through better knowledge management
- Exploring ways to leverage knowledge management for strategic tax planning
- Curious about the potential cost savings and ROI of knowledge management tools in tax functions
- All of the above
- Most of the above



Place them in order of the value each brings?

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Q&A



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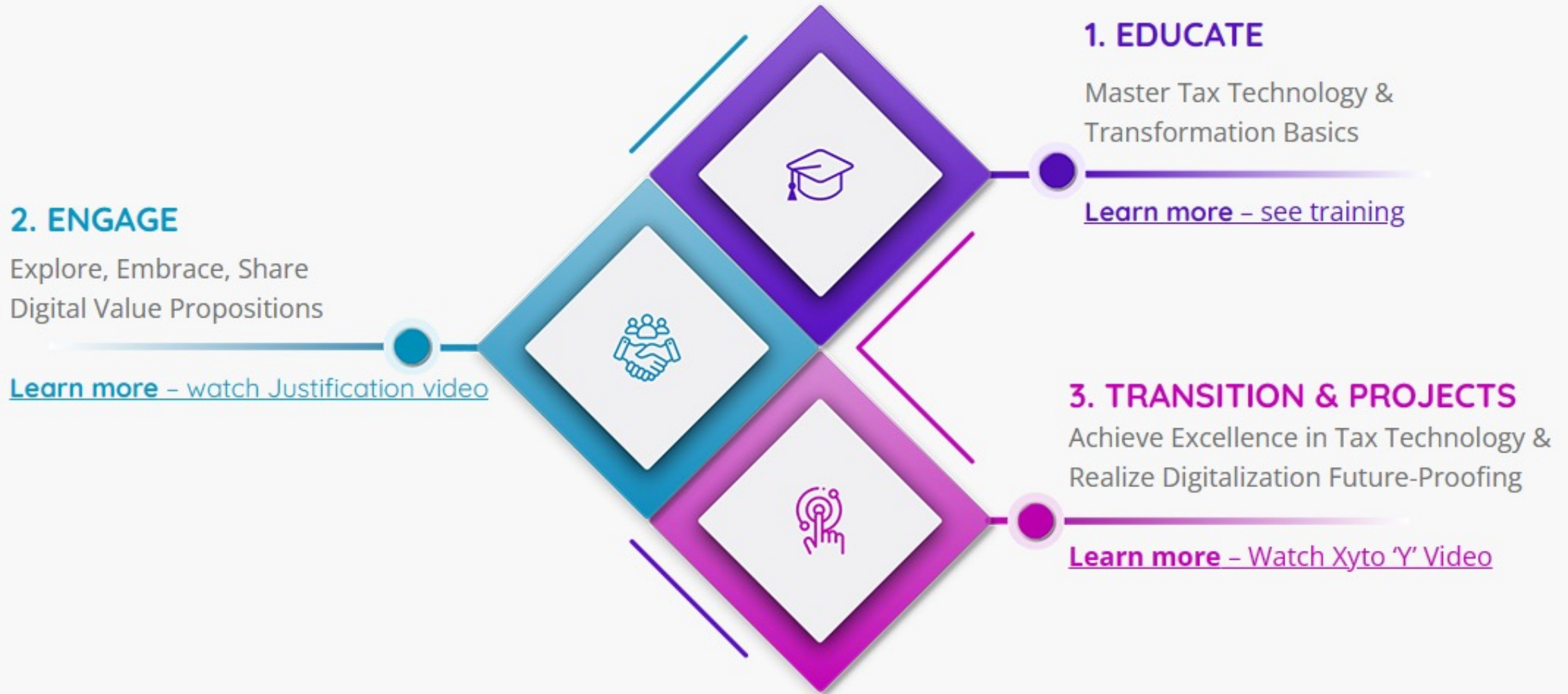
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Engage fully in corporate digital initiatives with the 3-Step Plan:



Business Skills

- Tax Strategy
- Tax Legal
- Tax Business
- Tax Operations
- Business Analysis
- Project Mgt
- Scrum Master
- Org Adoption
- Process Mgt
- Content Mgt
- Analytics

Corporate Structure



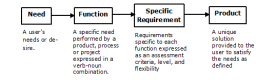
Business Tax Flows



Business Factors



Functional Behavior



Business Process



Training & Wiki



Innovation



Business

Program Mgt (Taxologist)



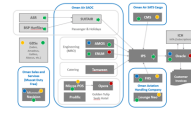
Project Leadership



Architecture

Technology

Solutions Landscape



Third Party Offerings

System Factors



User Data Stories



Solution Architecture



Data Model



Design/Config Plan



Construct & Test



Solution

Technology Skills

- Enterprise Architecture
- Tax Technology Industry
- Technical Leadership
- Solution Architecture
- Data Analysis
- Data Modelling
- SDLC (Solutions Dev Life Cycle)
- Technical Design
- Technical Docn
- Tax Technologist
- Support & Maintenance

Concepts

- Industrial > Information-age
- Technology: Arms-length > Engagement
- People, Process & Technology
- Process > Data-driven (Systems approach)
- Meta-information & "Gig"-economy skills
- First Principles Tax Calcs
- Real-world Data Modeling
- Conceptual Integrity
- Future-proofing
- Encapsulation
- Robustness & Resilience



Business Skills

- Tax Strategy
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Business

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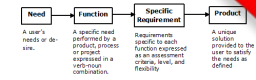


Business Features



Architecture

Functional Behavior



Business Process



Training & Wiki

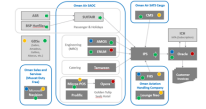


Innovation



Technology

Solutions Landscape



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Solution Architecture



Data Model



Deployment Plan



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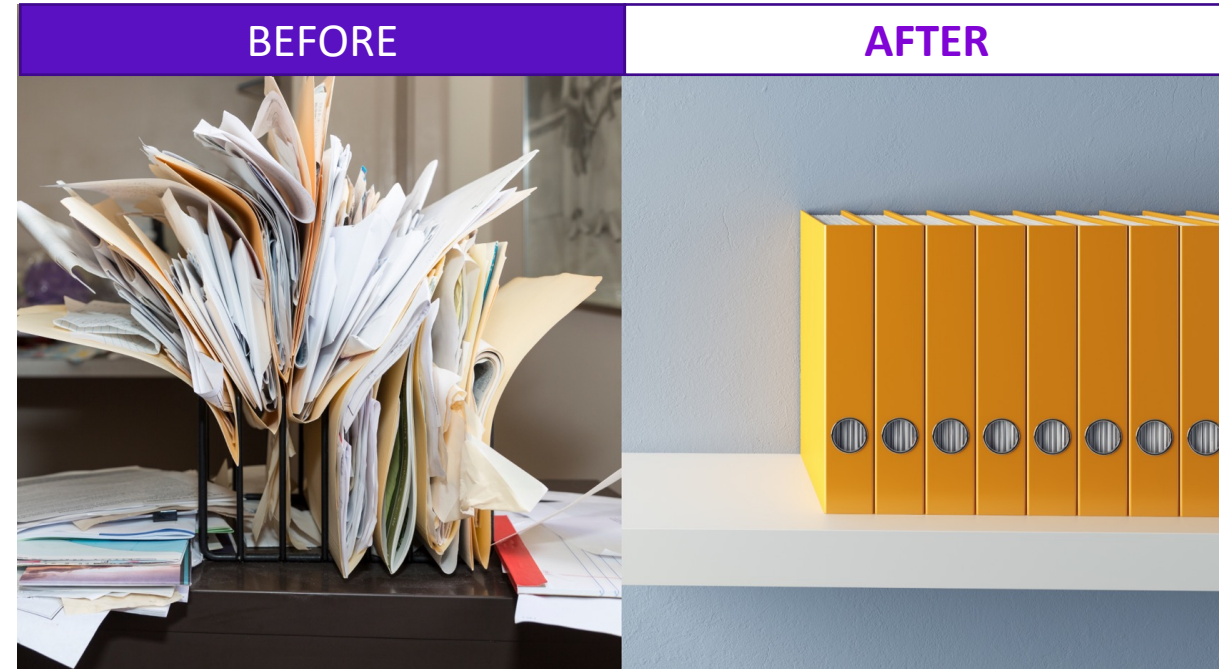
Benefits of Xyto Base Over Traditional Documentation

Adaptability: Dynamic, not static. Content evolves with changing regulations.

Immediacy: Updates reflect the most current information.

Scope: Combines business, technological and data insights.

Context-rich: More than just data—stories, insights, rationale.





Xyto Base

Tool for ground-up visibility & holistic control

How to implement Xyto Base

- **Operated:** Xyto will handle the backend, while front-end operation is intuitive, similar to popular wikis.
- **Who by:** Xyto for initial setup and our internal teams for daily operations.
- **Who maintains it & how:** Maintenance is a joint effort. Xyto manages the platform's technical aspects.
- **Governance (RACI):** Roles and responsibilities between Xyto and us will be defined to avoid any overlaps or gaps.

The 7 Attributes of Data

METAINFO CHARACTERISTICS

7 Attributes of Business Data

1. Relevance
2. Completeness
3. Timeliness
4. Accessibility
5. Accuracy
6. Comprehensibility
7. Consistency