

A man with glasses and a beard, wearing a blue jacket over a blue turtleneck, is kneeling and looking at a tablet computer. He is in a modern office or laboratory environment with large windows and computer monitors in the background. The image is partially obscured by a dark grey diagonal overlay on the left side, which contains the text.

TAX PERFORMANCE
ENGINEERING

Client Success Story

BACKGROUND

The tax department at a large multinational organization used manual processes and rudimentary technology to generate standard input templates for controllers of 300+ business units. These templates allow the controllers to allocate costs associated with intercompany sales in order to compute operating margin for transfer pricing compliance.

Company Issues

A review of the company's existing processes identified many issues. The company had also reached the limits of their legacy macro-enabled workbooks. Left unchecked, the company was exposed to substantial risk.

Technology Issues

The original process ran end-to-end using a series of inputs from a consolidation software tool and iterative, macro-enabled workbooks.



Data Issues

All inputs came from the consolidation software in a relatively consistent format; however, identifying new accounts, new plants and new intercompany trading partners was manual and tedious. Due to performance issues, the company passed on processing historically immaterial plants in order to shorten processing time.



Process Issues

After manually identifying and mapping new accounts, plants and intercompany trading partners, the master template that governed the format and formulas for 300+ templates required an update to include these new items.



Workforce Issues

This process was architected and operated by a single individual, a third-party consultant. It took two days to run this process end-to-end.



BDO's Solution



It quickly became apparent that an automation platform like Alteryx was the simplest solution for identifying new accounts, plants and intercompany trading partners. BDO leveraged the configuration and processing power of Alteryx to easily re-engineer the process.



BDO applied easily configurable output tools in Alteryx to generate one file for each of the 300+ plant locations. The new output is designed so plant controllers won't notice a difference in the structure or functionality of the files they receive. No retraining or change management was required.



BDO employed an Alteryx tool designed specifically to remove blank rows and columns. Dozens of lines of programming code were reduced to the simple configuration of one tool!



A formal master data management and training process proved essential for continued success. BDO developed and administered training materials to guide the corporate tax department.

Company Benefits



The tax department was **fully engaged** during the development and implementation. After a successful launch, the company has **full ownership** of the redesigned process.



The client **independently** runs and maintains the solution end-to-end with zero reliance on BDO or the third-party consultant.



Processing time that once took two days for a sophisticated user to complete is now accomplished in **under one hour**.



By leveraging analytics process automation (APA), **processing speed is no longer a limitation**, and the company can now include all entities regardless of size.