



Successful Tax Solution Implementation: Key Questions to Ask Your Solution Provider

Introduction

Selecting the right tax software for your organization can take time. There are several steps involved, including creating an evaluation committee, developing selection criteria, determining the short list of contenders, and testing, comparing and checking references. When you finally arrive at a decision, it can feel like all of the hard work is done. Unfortunately, it's not. At least, not quite.

Successful implementation requires tight project management to ensure that you effectively map and optimize processes to take advantage of the benefits delivered by the software. Dedicated and tailored

professional services can ensure that your move to a new tax software solution is an unqualified success.

The goal of this white paper is to highlight some of the most important questions your organization should be asking of a professional services team when researching and/or considering solution providers of tax services. To add perspective, the paper will then outline the professional services implementation process that Wolters Kluwer offers to its customers that significantly enhances the user experience with CCH® software solutions.



TOP 10 THINGS YOU SHOULD KNOW

from your potential provider and/or professional services team

- 1. Who is on the project team?**
What is the makeup of the team that will be handling your implementation?
- 2. What is the subject matter experience of the team?**
How thoroughly has the team been educated in Tax? Will they understand the potentially complex situations you may have to deal with? Are they just software installers?
- 3. Do they have experience with organizations like yours (your size, your industry, your ERP software, etc.)?**
Will the team know your business and the needs of your industry? Will they be familiar with the systems you use day in and day out? Will they know how all of your business systems integrate?
- 4. Will the team provide a quote on the project?**
How long will it take to find out the cost of your implementation or engagement? How many layers must it go through before reaching your desk?
- 5. Can they commit to not going over that quote?**
How confident is the company in their project team? How confident will the team be in their statements of work?
- 6. What are the best practices that can help get my organization up-and-running faster?**
Will the project team be able to understand your business, industry, and workflows enough to provide best-practice knowledge to make the implementation as efficient and effective as possible?
- 7. What type of communication can I expect from my implementation team?**
Will the team be providing clear and concise updates on progress and status? Will they bring issues to your attention as soon as they're aware so that necessary decisions can be made and any possible adjustments made quickly and efficiently to keep on schedule?
- 8. What type of administrator training is included in the implementation?**
Often overlooked, how well educated will the team leave your system administrators? Will they have hands-on experience? What type of follow up is done on the transfer of knowledge?
- 9. How will knowledge be shared with members of your Tax department?**
How will the provider and team make sure your Tax staff knows how the system functions and how it changes existing workflow? How much hands-on involvement will your staff experience before the team leaves the premises?
- 10. What consulting can you expect beyond that of a new system implementation?**
Can the provider consult on best of process? How comfortable are they working with the many systems and configurations?

Professional Services for CCH® Solutions

Backed by over 100 years of CCH tax and accounting leadership and expertise, Wolters Kluwer delivers world-class solutions and professional services to drive greater levels of accuracy, accountability and efficiency throughout your organization. Our proven methodology successfully applies our established techniques to businesses of all sizes. We establish a clear goal for each engagement and assign the most knowledgeable resources for each stage of the project. Furthermore, we collaborate with certified implementation providers to bring advanced services and solutions and help move your business forward. What truly sets us apart is our keen focus on knowledge transfer from our consultants to your staff, starting immediately upon engagement and continuing through the migration to a fully functional production system.

PHASE 1:

Planning and Business Assessment

One of the most important keys to a successful tax software solution implementation and integration is a thorough planning stage in which the project team builds a comprehensive project plan. During this phase, the team agrees upon project terms and defines the project’s scope with the client. In addition, the Wolters Kluwer team identifies the project manager and implementation team and begins mapping out a full schedule that is agreed upon by all involved.

Your project manager is one of the lynchpins that can most influence the success of your implementation. Project managers for CCH solutions all have deep and broad implementation experience in a variety of environments. Our team has a unique combination of expertise and proven experience with tax provision, sales and use tax issues, compliance, tax statutes and interpretation, audit defense, software installation and integration with a wide array of ERP systems. This background ensures that your CCH solution is configured and optimized with your existing financial system.

During Phase 1, the Wolters Kluwer team will provide a quote on the professional services engagement—a quote that you can bank on. In addition, the team discusses all relevant Information Technology (IT) considerations of the plan and begins scheduling all of the meetings and milestones for the rest of the engagement. At the end of the business assessment phase, the project team will have a completed project plan, mapping out the project terms and scope definition.

PHASE 1

Key Deliverables:

- Project team appointed
- Planning and meetings completed
- Scope defined and agreed upon
- Initial Phase 2 meeting confirmed

PHASE 2:

Analysis and Design

In Phase 2, our team defines the best practices and processes to be followed throughout the implementation that will best meet the client’s unique business requirements. Those processes include conducting an in-depth business assessment. In that assessment, the professional services team reviews all current processes, documentation and tax operations and configurations.

The review will help identify opportunities for system and process improvements. In addition, the team can help identify the solutions and software needed to help you streamline your workflow and achieve the desired results. Our professional services team will typically review and report on:

- Overall business processes and workflow.
- Storage, retrieval, and sharing of workflow documents.
- Compliance with regulatory authorities.

In addition, we will review the interactions with customers and third parties, such as investors, vendors, accounting and business advisors. We will also review the storage practices pertaining to all corporate documents and intellectual capital to ensure that nothing has been overlooked.

PHASE 2

Key Deliverables:

- Define reporting and entity details
- Define data import files and mapping
- Define configuration options
- Define and agree upon installation methods and dates

PHASE 3:

Software Deployment and Configuration

Before new software can be successfully configured and deployed, all data must be migrated and converted to the new system. Depending on your organization’s data and requirements, this process can take time. The professional services team can evaluate and review your existing software to ensure that the new software is compatible with your current systems. In addition, our tax professionals provide hands-on guidance to assist with system implementation, including the setup and data mapping of GL’s (chart of accounts). The implementation team will also assist with data migration from other systems to a CCH solution, along with administrator training.

PHASE 3

Key Deliverables:

- Pre-training checklist signoff
- Software installed
- Data files converted
- Administrator training

PHASE 4:

Pilot and Rollout

Once the software is installed, the implementation team will bring the entire tax department up to speed on the new solutions. The goal of Phase 4 is to successfully complete user testing and to roll out the final configuration. The pilot is used to verify that the software now fully supports all revised process changes. This is where all of the opportunities for process improvement are realized through the software. Testing helps ensure that all connections are working as intended and that all efficiencies are being realized.

WEEKS 3-4

PHASE 4

Key Deliverables:

- System meets requirements
- Pilot planning
- Pilot completion
- General use testing

PHASE 5:

Post Implementation

During the final phase, the CCH solutions team conducts a full post project review and transitions the client team to mainstream product support. The Wolters Kluwer team takes each phase seriously and will work with your organization to ensure that knowledge is effectively transferred to your staff. By the end of Phase 5, your team should feel fully trained on their new tax software solution. Should any issues emerge following implementation, we stand ready to help answer questions and make sure that everything is working as designed.

WEEK 5

PHASE 5

Key Deliverables:

- Project close meeting
- Support handoff
- Project evaluation and review

Note: Timeframes given for each Phase are approximate, based on a typical project. The specific requirements of an individual project will determine the actual schedule.

Direct Tax Professional Services from Wolters Kluwer include:

Business Assessment

- Overall business processes and workflow.
- Storage, retrieval and sharing of documents.
- Compliance with regulatory authorities.

Data Conversion

- Hands-on guidance to assist with system implementation.
- Setup and data mapping of GLs.
- Assistance with data migration from existing systems.
- Transition testing.

Data Migration and Integration

- Complete system implementation.
- Perform system setup and configuration.
- Data mapping.
- Reconciling of information to verify setups.
- Verification that all data is successfully transitioned.

For more information on Direct Tax Professional Services from Wolters Kluwer and how we can help your organization optimize your tax software investment, please contact your account representative or call our customer service team at 800-678-2315.