

Datamatics Enables a Productive Tax Season for a Leading US CPA Firm.



About the Client

Our client is an industry-leading CPA firm based in Ohio, USA, with multiple offices around the world. They specialize in providing accounting, taxation, and advisory services to their clients.



Industry Focus

CPA /Accounting Industry



Geography Focus

USA

Objective

As an industry-leading CPA firm in the US, the client delivers accounting, taxation, and advisory services to their clients from multiple offices across the country. This often results in a heavy inflow of work, which can be difficult to manage during peak season. To address the peak season demand, the client was looking for a trusted outsourcing partner to handle their:

- Tax return preparation – individual, business, and trust, etc.
- Accounting work
- Resource crunch management

Project Highlights

As a trusted partner to over 100 CPA clients globally, we were adept at understanding the requirement of the client and preparing a comprehensive solution to address the business need. The highlights of the project were:

- 100% work on RDC (remote connection) on the client's environment
 - Preparation of tax returns – individual, business, and trust, etc
 - Peak season accounting work
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Business Challenges

The peak season tax preparation tasks come with their own fair share of complexities. The situation with our client was no different; it presented multiple challenges –

- Peak season preparation of individual, business, and trust tax returns, etc.
 - Complex accounting work
 - Support for the growing clientele with necessary resources to handle the accounting work volume, etc.
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Datamatics Solution

Using our proficient accounting and tax experts, we were able to meet the business requirements through timely delivery of:

- Individual, business, and trust tax returns, etc
- Support for the resource crunch
- Cost-effective accounting work



Approach & Methodology

After gathering the business requirements, our team of tax and accounting experts was able to chalk down a precise methodology to address all the clients' needs at once.

- Providing them with a team of tax accountants to prepare the returns & accounting
- Assigning a senior accounting resource to review the tax preparation & accounting
- Appointing a dedicated project manager to oversee and manage the project

Business Gains

Our proficient team of accounting experts, together with a dedicated project manager, were able to meet the peak season tax return demand and grow their clientele, resulting in an overall profitable tax season. The client was able to handle the workload much more efficiently and cost-effectively, which helped them with resource management. The client now has a flourishing relationship with us and has requested more senior resources at a managerial level to carry out the review of the work.



Email : marketing@datamaticsbpm.com

Website : www.datamaticsbpm.com

Datamatics Business Solutions is a technology-driven outsourcing partner for leading global enterprises. With our AI-enabled Finance & Accounting services, we help CPAs and CFOs across industries transform their Finance and Accounting functions.

With a perfect balance of a highly scalable and secure ecosystem consisting of some of the most acclaimed F&A and ERP software and human ingenuity to go with, we have been able to retain almost 100% of our client and help them achieve their business goals with absolute certainty.