



Datamatics Powers A 40% Boost in Tax Season Productivity for a Leading US CPA Firm.

About the Client

The client is a prominent CPA firm based in Ohio, USA, with a growing footprint across multiple locations worldwide. The client specializes in providing high-quality accounting, taxation, and advisory services to their clients.



Industry Focus

CPA / Accounting Industry



Geography Focus

USA

Objective

The client was facing a 60% surge in seasonal tax workload and was looking for a reliable outsourcing partner to:

- Resolve a 35% seasonal resource shortage without compromising quality or turnaround time
- Manage preparation of Individual, Business, and Trust Tax Returns
- Execute high-volume Accounting Work

Project Highlights

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

- 100% work on RDC (remote connection) on the client's environment
 - Preparation of tax returns – individual, business, 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 –

- Overwhelming demand for accurate and timely tax return preparation during peak season
 - Inability to scale internal resources quickly to match increasing client base
 - High operational costs during the 4-month peak season
 - Complex, multi-entity tax scenarios requiring experienced professionals
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Datamatics Solution

As a trusted partner to 100+ CPA firms globally, Datamatics was uniquely positioned to step in with an agile and effective outsourcing model.

Solution Snapshot:

- 100% Remote Delivery Model on the client's secure environment via RDC
- Delivered over 2K tax returns (individual, business, trust) in a 12-week span
- Handled 3K+ hours of accounting work during peak season
- Deployed a 10-member FTE team of tax and accounting professionals
- Reduced turnaround time by 40% using streamlined review and approval cycles
- Cost savings of 45% vs. hiring temporary in-house staff

Approach & Methodology

- **Requirement Analysis**
 - Detailed process mapping and volume estimation with client's in-house team
- **Team Deployment**
 - A blend of junior and senior tax professionals assigned
 - Senior CPA-level reviewer embedded in the process
- **Project Governance**
 - Dedicated project manager for real-time coordination, SLA tracking, and communication
- **Quality & Compliance**
 - Multi-level quality checks to ensure 100% compliance with IRS and client guidelines

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 concrete business gains achieved through our solution include:

- 38% Increase in Productivity during peak season
- 45% Reduction in Operational Costs
- Enabled the client to expand service to 18% more clients during tax season
- Improved turnaround on tax filings by up to 3 days faster per return
- Strengthened ongoing partnership – client requested additional senior review resources for the upcoming year



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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.