

Strategic Offshore Tax Support by Datamatics Business Solutions Enables a Mid-Sized Canadian CA Firm to Scale T1 & T2 Operations Efficiently

Company: Mid-Sized Canadian Chartered Professional Accounting Firm

Geography: Canada (Ontario & British Columbia)

Industry: Public Accounting & Tax Advisory



Problem Statement

The client faced several operational challenges during peak tax seasons:



Seasonal spike in T1 & T2 return volumes

The client experienced severe workload fluctuations during tax season, making it difficult to maintain consistent turnaround times.



High operational costs with local staffing

Maintaining a large in-house team for seasonal compliance work increases costs.



Manual processes and inconsistent client documentation

Unstructured submissions such as PDFs, scanned documents, and emails led to data entry errors and review delays.

The firm needed a scalable solution to manage high tax volumes while allowing partners to focus on advisory-driven client services.

Solutions Provided by DBSL

Our team designed a structured offshore tax support model to streamline workflows and improve efficiency.

1



Dedicated Canadian Tax Team

- Offshore specialists trained in Canadian personal (T1) and corporate (T2) tax preparation
- Alignment with the firm's internal tax software, review preferences, and compliance processes
- Extended operational coverage during peak filing months

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Document Management & Process Automation

- Implementation of a structured document indexing system for unorganized client submissions
- Automation scripts designed to:
 - Extract recurring client data
 - Validate prior-year carry-forwards
 - Cross-check reconciliations
 - Flag anomalies for review

This significantly reduced manual data entry and improved processing efficiency

2



Structured Workflow & Quality Framework

- Standardized T1 and T2 preparation templates to ensure consistency
- End-to-end workflow covering:
 - Document intake
 - Data extraction
 - Return preparation
 - First-level review
 - Query management
 - Final submission readiness
- Two-tier quality review system to ensure accuracy before partner sign-off



Result

Within the first tax cycle, the firm experienced measurable improvements in operational efficiency and scalability.



28–35%

reduction in operational costs



35%

improvement in overall turnaround time



75%

reduction in processing time for repetitive data tasks



40%

reduction in partner review workload

The firm also gained the ability to handle growing client volumes without increasing permanent headcount.



Testimonial

“Partnering with Datamatics allowed us to manage peak tax volumes without expanding our internal team. The structured workflows and offshore tax expertise significantly improved turnaround times and freed up our partners to focus on advisory services.”

— Partner, Canadian CPA Firm.

Conclusion

With Datamatics Business Solutions’ dedicated offshore expertise, workflow standardization, and targeted automation, the Canadian CPA firm transformed its tax preparation operations.

The engagement improved operational efficiency, reduced costs, and enabled the firm to redirect valuable partner time to higher-value advisory and tax-planning services.

Datamatics Business Solutions Ltd.

North America: +1 571-297-6166

EU & ME: +44-20-3005-2151

APAC: +91-22-6671-2001

marketing@datamaticsbpm.com

www.datamaticscpa.com/ca



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