

# ROI Assessment for Financial & Tax Service Provider

## ROI Assessment for a financial and tax service provider for web-based tax services

### Who is the Client?

The client is a renowned financial and tax service provider based out of the United States. The business offers a web-based platform for public and registered businesses for managing their tax information, receive tax consultation, and prepare and submit taxes. The process was manual, either and individual effort or with the assistance of Tax Specialists enrolled on the platform. There is also a bouquet of services that the platform offers to help businesses and individuals better manage their finances and public investments for smarter tax planning.



### What was the client's need?

As a business dealing with finances and highly confidential public data, the client is heavily invested in alleviating pilferage and software defects to the tiniest blip. When approached, the client presented an open mind to every possibility on the table that has the potential to fortify their platform and services rendered.

The business houses and processes an enormous quantity of data - a lion's share of which is highly sensitive and irreproducible. The IT infrastructure is heavily on-premise based and had a centralized server and data repositories. The platform is exposed to a wide swathe of endpoints to external sources with varied security profiles. The business also leverages a flurry of processes pertaining especially to their ERP and CRM systems which were handled by the analysts manually every day. The business is run by wide range of professionals across geographies who connect to the client's network to carry out their tasks.

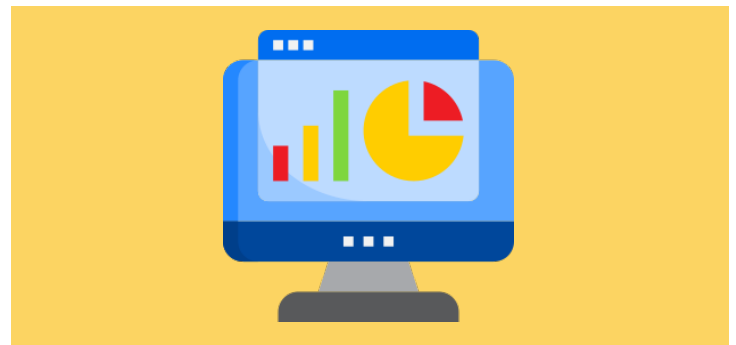
The assessment and the consultation that were to be performed, complied unequivocally with all the constraints to be well-rounded, adaptable, high-yielding, and cost-worthy.

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## What services did Data-Core provide?

Data-Core approached the client with its Quick Risk-Based Assessment consultation service covering a holistic audit of their business infrastructure. The audit covered areas that can benefit from process automation, security scale up, infrastructure automation, data management automation, and AI based intelligent services.

The Data-core Automation consulting team worked with the client team for one month to best understand their IT and data infrastructure, engineering flows, security configuration, and business processes. A detailed assessment report was submitted with the recommendations that expounded on ways to automate and optimize the overall business functions, along with clear business value enhancements, average implementation times, and precise cost saving figures to aid in decision making. Data-Core then provided an exhaustive set of workflow rules and governance procedures which proved valuable to the management, the functional, and the technical audience alike.



## In Summary

The ROI Assessment not only helped the client's management team revisit their business landscape, but also gave them the opportunity to instill measures to save costs and integrate niche and proven technologies in their business to maximize value and growth over time. The overhaul has been planned to roll out in phases with domain triages based on criticality and budget allocations. In this ever-changing environment, it has become essential for the Data-Core Software Engineering team to work in tandem the client team for administering the recommendations outlined in the assessment report. The result was improved ROI through a unified framework which provides intelligent real-time analytics and the ability to react to continuous changes.

*Discover the Data-Core Advantage.*

*Learn how we can help your company be more relevant, effective and efficient.*



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