



HOW OUR TAX RESOLUTION CLIENT KEPT THEIR **FINANCIAL BOOKS** CLEAN THROUGH **ROBUST SERVICE** WORKFLOW

In this case study, we developed custom tabs and a robust service workflow mechanism that not only ensured data integrity but enabled timely revenue recognition and easy maintenance of financial statements.

SUMMARY

Our tax resolution client faced challenges with maintaining accurate financial records, primarily due to revenue recognition issues caused by discrepancies in their service workflow. To address this, we implemented custom tabs and a robust service workflow system. This not only ensured data integrity but also facilitated timely revenue recognition and simplified financial statement management

KEY METRIC

Establishing and enforcing a workflow to ensure accurate records.



Standard workflow for all case advocates

BUSINESS CHALLENGES

The client entrusted numerous case advocates with the responsibility of managing multiple customers, each entailing hundreds of documents, unique resolutions, and specific invoices tailored to the required services. Unfortunately, the case advocates were not adhering to the prescribed workflow for handling these resolutions and maintaining records, leading to data analysis challenges.

This discrepancy in workflow adherence had a direct impact on the accuracy and timeliness of revenue recognition, resulting in discrepancies within the financial statements. The importance of maintaining precise financial records cannot be overstated



**Standard workflow
for all case advocates**



**Opportunity to double-
check each data point**



**Minimised room
for error**

SOLUTION PROVIDED

We implemented a customized service workflow within the client's CRM, introducing a dedicated '**Service Workflow**' tab to enforce sequential progress.

This Service Workflow structure was designed to safeguard data integrity for significant service milestones, crucial for revenue recognition in compliance with **Generally Accepted Accounting Principles (GAAP)**. It not only aimed to prevent data discrepancies but also laid the foundation for a holistic service workflow management approach.

At the heart of our solution was a '**Verification Checklist**,' a CRM-integrated pop-up. Case advocates could access this checklist to meticulously review and ensure the secure and accurate completion of each status. This checklist acted as a systematic guide, guaranteeing the precise capture of all critical data points.

Upon marking a status as completed, users were automatically directed to the Verification Checklist for thorough review, establishing comprehensive data collection as the cornerstone of the Service Workflow.

IMPACT ON BUSINESS

The enhanced workflow had a significant transformative impact on the business. The custom workflow tab and checklist ensured consistent adherence to the correct service workflow, safeguarding data integrity for revenue recognition and financial statement accuracy. This case study exemplifies the tangible benefits of integrating technical solutions into the business framework, leading to improved workflow, precise financials, and enhanced overall performance.