

## CUSTOMER SUCCESS STORY

# Streamlining a Global Firm's Tax Process Workflows

Re-Architecting a Legacy Application to Leverage Cloud-Native Capabilities



ATSTUDIO

### Overview

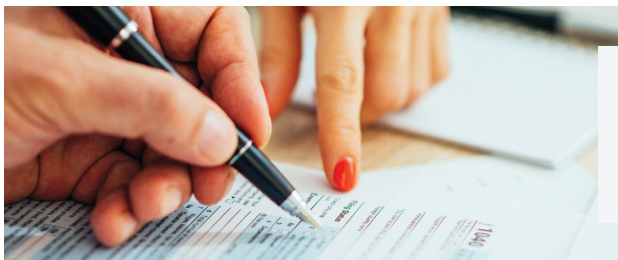
With a global tax practice that spans 158 countries, a multi-billion dollar professional services firm wanted to streamline its tax process workflow by re-architecting its outdated tax application. Previously, the application—which allows the firm's tax clients to filter and generate tasks, manage tax documents and oversee all functions ranging from planning to auditing—was built using an outdated, error-prone technology primarily restricted to on-prem environments. Additionally, the legacy application lacked a version control strategy to track and manage source code modifications, which led to inconsistent user experiences, slow deployments and difficult bug fixing.

To enhance its tax process workflow and leverage cloud-native capabilities, the firm sought AgileThought's help to re-architect the application using Microsoft's new SharePoint App Model. Designed to support both on-prem and cloud topologies, the new application would simplify tax workflow management, promote collaboration and provide a seamless user interface and experience across devices. In addition to re-architecting the application, AgileThought would also help deploy the solution to the firm's clients, configure it based on specific client requirements, and provide expert guidance on using the application.



### Client Challenges

- › Difficulty managing the application's multiple branches of code, which led to an inconsistent user experience among the firm's clients and decreased its developers' ability to fix bugs effectively.
- › Standardizing the overall tax process workflow and improving version control while still allowing the application to be tailored to each client's specific tax requirements.
- › Outdated technology component could only be supported in Internet Explorer and had restrictive security zone settings; also required all tasks to be loaded upfront, which was time-consuming and could take 30 seconds or more before a user could open a task.
- › Adapting to evolving customer needs and transitioning from an on-prem legacy farm solution to a cloud-enabled solution.



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## SOLUTION DELIVERED

### One Source Code Base for Multiple Environments

AgileThought created one centralized source code base for the application to operate both on-prem and in cloud environments. AgileThought used SharePoint's client-side object model (CSOM), which supports both on-prem and Office 365 environments while reducing the cost and consumption of SharePoint farms. Previously, the application's technology component required the client to install templates upfront if they needed SharePoint lists and libraries; now, using Microsoft's SharePoint App Model, the upgraded application allows implementers to create all necessary lists and fields using a remote deployment approach, which reduces the risk of leaving behind artifacts that could impede future SharePoint upgrades.

### An Agile & Automated Development Approach

Using Azure DevOps to manage the entire project, AgileThought automated production builds for each version of SharePoint and used semi-automated continuous integration builds to deliver more frequent and reliable code changes. Additionally, AgileThought implemented development, QA, user acceptance, and demo environments in both on-prem and Microsoft cloud environments to fully support test cycles, business reviews and sales. Using agile practices to guide development and maintain a quarterly release cycle, AgileThought also implemented two-week sprints, sprint planning and backlog prioritization to accommodate new client requests.

### Modern, Intuitive User Interface

Using AngularJS, AgileThought re-architected the application as a single-page application to reduce time spent on page reloads. The single-page application, which uses fewer files than traditional, server-side rendered applications, also simplified development and enabled implementers to deploy the solution rapidly to clients. Additionally, the fully immersive solution offers full browser support, enabling end users to use their preferred browsers—like Internet Explorer, Safari, Edge and Google Chrome—on all devices. With powerful filtering capabilities and a responsive, modernized user interface, the application allows implementers to easily select and generate tasks from templates for a tax period, while providing a faster, cleaner tax workflow process for end users. Now, end users can navigate to a specific task in 5-10 seconds instead of waiting 30 seconds or longer.

### Hands-On Partnership and Guidance

As part of the partnership with the firm, AgileThought helped deploy the application to over 80 of the firm's clients. AgileThought wrote a deployment guide—a scripted, how-to document outlining a proper deployment—to help the firm's implementers deploy the application effortlessly to clients. Then, once deployed, AgileThought managed a help desk to provide technical support for the firm's implementers as they set up client environments. By providing guidance on configuration and implementation, AgileThought taught the firm implementers how to help clients maximize the use of their applications.



## VALUE ADDED

### Simpler, Customizable Workflows

Using task and role features, the tax application simplifies the way in which users generate, manage and navigate every tax process workflow. Additionally, the application is easy to learn, easy to use and can be fully customized to suit each client's specific needs.

### Secure, Cost-Effective Deployments

The application can be securely deployed in two ways: within an existing SharePoint environment, or in the cloud by a third-party hosting provider. Additionally, as a customer-hosted solution, the application doesn't require a software license or ongoing maintenance fees to operate.

### Greater Collaboration

By improving document management and automating key processes, the application drives process improvement, transparency and collaboration—three key elements needed to thrive in an increasingly complex tax landscape.