

## TAX REPORTING SERVICES - CASE STUDY

### In Brief

- A leading real estate services provider was challenged to meet turn time requirements to prepare tax reporting documents due to spikes in volume
- Within six weeks, Indecomm developed and deployed a web-based technology solution, Taxplorer™, to gather the required tax information in an accurate and efficient manner
- With Taxplorer™ and Indecomm's outsource services the client experienced improved turn-times, high levels of accuracy, reduced costs, and improved customer satisfaction

### Client Information

Indecomm's client is a leading provider of real estate transaction services and one of Fortune' admired companies.

### Background

The client through its many subsidiaries services residential and commercial customers. They have over 600 offices and a network of several thousand settlement agents throughout the U.S., Mexico, Caribbean, Latin America and Europe.

### Problem Statement

- Indecomm's client was grappling with a significant surge in transaction volumes and this posed a challenge in terms of meeting the agreed turn times with their customers
- The Client could not add more personnel quickly, as the process demanded highly experienced staff familiar with real estate tax and county procedures
- Our client experienced severe delays and a backlog of tax orders led to customer dissatisfaction and loss of business
- The client approached Indecomm to take over the process and deliver a seamless Tax reporting process

### Solution Summary and Key Benefits

- Indecomm performed a detailed process study and created a detailed documentation of the tax services rules by county, by state along with all relevant details to obtain tax information
- Within 6 weeks of initiating the project, we developed a web-enabled application named Taxplorer™ with a built-in knowledge repository, queue and workflow management, user-friendly features and an online real-time dashboard

- Taxplorer™ was integrated seamlessly with our client's application via an XML interface thereby automating the order allocation to Indecomm and reduces the lag times
- Indecomm designed a rules-based workflow where the system does the segregation of transactions for online research, call research and mail-away requests in the queue automatically
- Taxplorer™ has a built-in county knowledge database of tax related information for more than 2800 counties which means the process is no longer people dependent as well as it enabled us to deploy personnel with minimal training
- The tax reports were customized as per our client's needs in the Taxplorer application to reduce the manual effort of preparing the tax reports
- Our tax research team quickly ramped up the volumes, and using the Taxplorer™ application to provide a seamless tax service

## The Results

- Our client's turnaround times dropped dramatically. For example priority tax report orders were returned in 2-4 hours instead of days
- Indecomm improved our client's tax report accuracy to 99 percent
- Indecomm cleared a backlog of orders in a relatively short period of time
- Our client experienced higher levels of customer satisfaction
- The client's staff was able to focus more on customer service and new business while Indecomm was able to manage their volumes efficiently
- Taxplorer™'s online dashboard, streamlined workflow and special queues enabled managing our client's customer requests more efficiently
- Our client also realized over a 30 percent reduction on their costs by outsourcing their tax services to us