

A bold, compelling title goes here.

Developed by:

**Headline:** [ Buying team or business unit ] should [ recommended action ] by [ timeline ]. This will result in [ outcome ], while avoiding [ cost of the problem ] created by [ problem] .

The Problem Statement:

Include who’s impacted, the cost, how it impacts a company-wide goal, and why the problem’s getting worse. Example formats include;

- Every [ frequency ], at least [ reach ] are affected by [ problem ], costing us [ cost ]. If that’s not addressed by [ timing ] then [ it gets worse ]. OR:
- Despite trying [ failed solution ], our team still can’t [ desired outcome ] because [ problem ], which has cost us [ cost of problem ].

Recommended Approach:

1. Describe the proposed solution design, including any testing, validation, or proven outcomes that support its effectiveness.
2. Highlight the key conditions that must be in place for the solution to succeed, such as process changes, systems integration, or stakeholder alignment.
3. Include a brief note on what’s needed to successfully resource the transition—whether that’s internal capacity, external support, or a phased rollout plan.

This section is designed to first gain alignment on the *approach itself*, independent of specific vendors. Once aligned, you can transition to show how [your company] not only meets but exceeds the agreed-upon requirements.

A Payoff That Matters:

Here’s a clear picture of the before vs. after state, highlighting the benefits:

Key Metric	Current Measure	New goal Measure	% Change
Executive KPI #1 (e.g., Tax Filing Accuracy)	85%	98%	(+15%)
Executive KPI #2 (e.g., Tax Filing Speed)	10 Days	4 days	6 days (-60%)
Executive KPI #3 (e.g., Rebate Recovery)	\$800k	\$1.2M	\$400k (+67%)

By investing in this new technology, tax teams will be able to [e.g., reduce manual processing time, improve filing accuracy, and mitigate audit risk], leading to substantial improvements in [e.g., cost savings, compliance, resource allocation]. This will directly impact our executive-level KPIs, driving a [percentage] improvement in filing efficiency and an [increase] in tax savings.

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## Required investments:

To successfully implement this solution, the following investments are needed:

- **Time:** The initial setup and testing phase will require [X] months, followed by a full deployment across the business in [Y] months.
- **People Resources:**
  - Tax Team: [# of team members] to oversee the project, validate the solution's performance, and train staff.
  - IT/Tech Team: [# of team members] to handle system integration, testing, and ongoing support.
  - External Consultants: [# of consultants] for specialized support during implementation.
- **Financial Resources:** Initial investment of [cost of technology, e.g., software licensing, integration services], plus any ongoing support fees. A breakdown of projected costs and savings is as follows:
  - *Initial Cost:* [X amount]
  - *Ongoing Annual Cost:* [Y amount]
  - *Projected Savings:* [Z amount from tax savings, reduced penalties, improved efficiency]

This investment timeline should be finalized by [date], with an implementation start date of [start date] and full deployment by [deployment date].



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## Tips for using this template (Delete Before Review by Stakeholders)

Determine who is the key stakeholder and tailor the template to that person.

### Metrics by Persona:

#### Tax Director:

- Reduction in time spent researching tax rates
- Reduction in time spent on data reconciliation
- Reduction in time spent on filing and remittance
- Reduction in time spent preparing for and managing audits
- Reduction in time spent on reverse audits and recovery
- Reduction in time spent on technology infrastructure updates and maintenance
- Reduction in time spent on administration of taxability changes
- Number of tax returns processed per hour

#### VP of Tax:

- Reduction in tax overpayments
- Number of annual audits
- Cost per audit (shared with Director)

#### CFO:

- Headcount

#### Sales:

- Number of tax assessments
- Number of days to set up a new customer

#### Fuel (Specialized):

- Number of credit rebills

#### All Personas:

- Reduction in compliance-related penalties and interest
- Employee turnover rate

## Best Practices:

- Ensure all metrics are relevant to the persona and clearly defined.
  - Use specific, actionable language in the problem statement.
  - Provide a balance of high-level and detailed metrics to cater to different stakeholders.
  - Include contextual examples in the recommended approach section to enhance clarity.
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