



ONESOURCE Workflow Manager & Dataflow

Driving towards efficiency

August 2020

[kpmg.com](https://www.kpmg.com)

How can we
increase your
efficiency?



1 The efficiency review

As a Certified Implementation Partner of ONESOURCE, KPMG is enthusiastic about joining Thomson Reuters in this exciting initiative. Through our growing and long-standing relationship, KPMG Tax Technology teams have begun to collaborate with Thomson Reuters on providing guidance, knowledge, and insight around the use of the ONESOURCE suite of tools.

From both KPMG and Thomson Reuters, we've seen an increase in the need to become more efficient with fewer resources, improve effectiveness with less time, and perform calculations and tasks with automation and more accuracy. In addition, with the increased need to work in virtual/remote environments, the ability to be able to do so by having immediate access to all your tax applications, processes, and data regardless of location has become increasingly important.

KPMG has been honored by Thomson Reuters as a Diamond Partner for ONESOURCE implementations since 2017, and with this collaboration, Thomson Reuters and KPMG are gearing up to provide clients an assessment of the use, maintenance, and overall evaluation of ONESOURCE WorkFlow Manager (OWM) modules and DataFlow, performed by leading implementers at KPMG.

This efficiency review can be considered a "checkup" for your tax department, performed remotely, with the goal of identifying opportunities for improvement that will help you get the most out of the tools you already own per industry leading practices.

During our time together, we intend to focus on a broad view of your tools and the processes that they support. Or we can isolate the discussion to a specific process, your choice.

Let's discuss how you can expand your use of the ONESOURCE tools to improve efficiency in your existing processes and add new processes into the use of the tools. There may be no better time than now to keep remote teams connected, gain efficiencies, and maintain control.

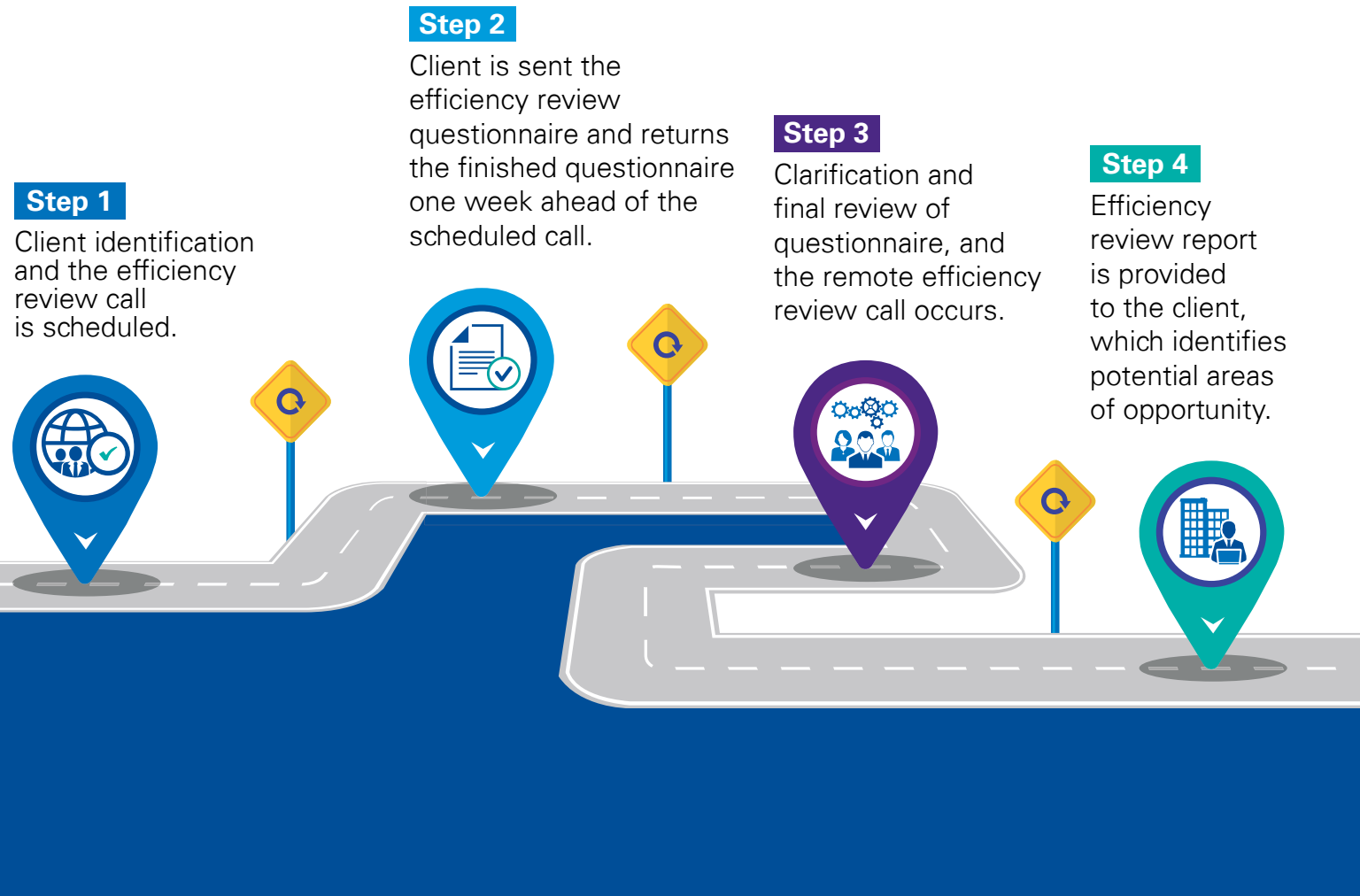
Upon completion of the assessment, a short report will be provided. The efficiency review's intent is to identify opportunities for improvements to enhance your investment in OWM and DataFlow.

The KPMG fee for conducting the assessment session can be applied as a credit against future work related to the report's recommendations.

We look forward to working with you and your team to help you achieve effectiveness throughout your tax department.

2 Our process

Our process involves a preassessment questionnaire that determines how a company is using the OWM modules and/or DataFlow tools. KPMG will then provide a block of time to perform the efficiency review with the goal of identifying and educating the client on where efficiencies can be gained. Following the review, a summary report of recommendations is provided to the client.

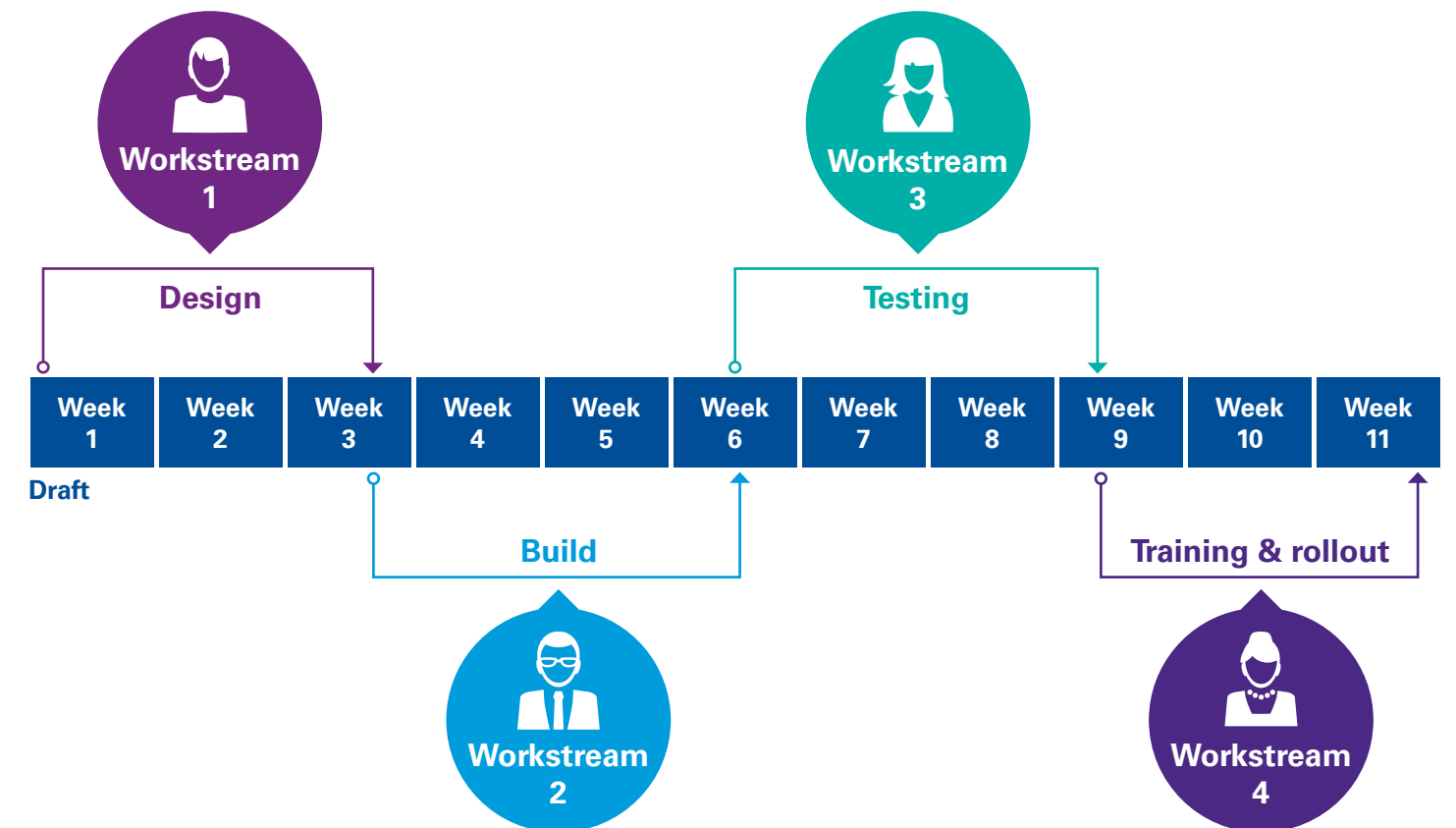


What can clients expect?

Once the efficiency review is completed, KPMG will follow up to identify what tools or modules may need specific attention, and what processes may require additional training or administration. These recommendations may include:

- Increase effectiveness and efficiency of the WorkFlow Manager modules (Workflow, Calendar, and FileRoom) as well as Entity Manager, within your existing processes or by adding additional processes to the modules' use.
- Increase automation, effectiveness, and overall performance of the DataFlow module within your existing processes as well as internal and external stakeholders or by adding additional processes to the modules' use.
- Benefit from administrator or end-user-level training on any of the OWM and/or DataFlow modules.

Sample roadmap with high-level transition workstreams



KPMG and Thomson Reuters relationship

 Thomson Reuters services

 KPMG Tax Technology services

 KPMG recent awards

Multiple Taxologist Award winning clients at SYNERGY

2017 and 2019 Certified Implementer Taxologist Award winners

Leading Certified Implementer of ONESOURCE tax technology

Fewer support calls into Thomson Reuters Help Desk than any other CIP firm

Contact us

Andy Maryott
Managing Director

T: +1 212-954-6727

E: amaryott@kpmg.com

Some or all of the services described herein may not be permissible for KPMG audit clients and their affiliates or related entities.

kpmg.com/socialmedia



The information contained herein is of a general nature and is not intended to address the circumstances of any particular individual or entity. Although we endeavor to provide accurate and timely information, there can be no guarantee that such information is accurate as of the date it is received or that it will continue to be accurate in the future. No one should act upon such information without appropriate professional advice after a thorough examination of the particular situation.

© 2021 KPMG LLP, a Delaware limited liability partnership and a member firm of the KPMG global organization of independent member firms affiliated with KPMG International Limited, a private English company limited by guarantee. All rights reserved. Printed in the U.S.A. The KPMG name and logo are trademarks used under license by the independent member firms of the KPMG global organization. NDP111627-1A