

# Your career in tax & technology

*Launch of user experience day (UX)  
Transforming the world of tax*

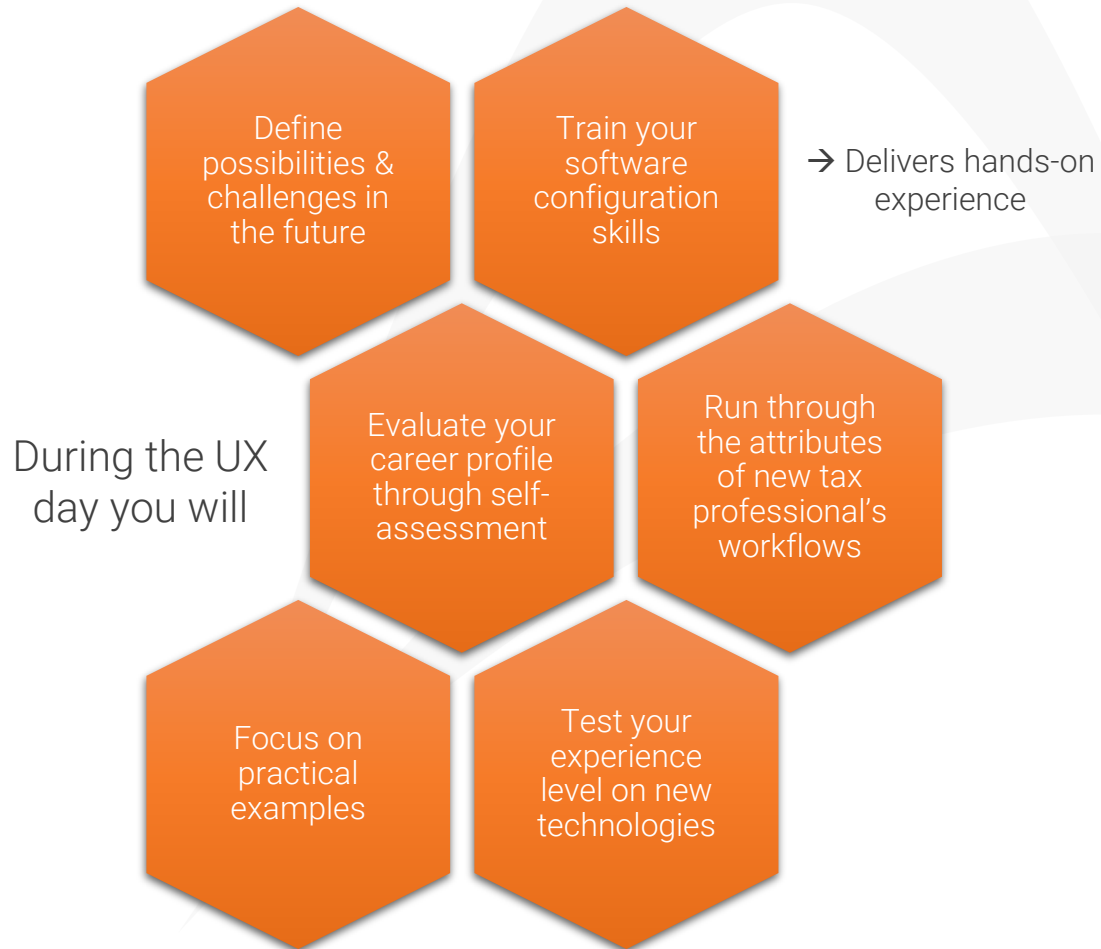


## Key Points of Interest

- ✓ In an environment that is constantly changing, how do you keep yourself up to date?
- ✓ The traditional tasks of tax professionals are “losing - ground”.
- ✓ Did you reflect in “where are you now” and “where do you want to be” in two years from now?
- ✓ What percentage of your workflows is digitalized and run through software technologies?
- ✓ Do you need new skills in order to stay relevant in the future?
- ✓ The UX day delivers: Self-Assessment, Self-training, Interactive workshop style.

Since the tax technology field is new:

- There is no established literature and best practices.
- Materials available *lack practical* examples.



# What's In It For You ?

# Agenda of UX Day – Full Day

The full day agenda might change depending on the knowledge and the experience of the audience, as well as the availability of the software

<b>01   09:00 – 09:30</b>	Welcome
<b>02   09:30 – 10:30</b>	Tax & Technology Memory Trainer
<b>03   10:30 – 11:00</b>	CbCR
<b>04   11:00 – 11:45</b>	TP Documentation
<b>05   11:45 – 12:30</b>	VAT Tech
<b>Coffee Break</b>	
<b>06   14:00 – 14:45</b>	Tax Planning
<b>07   14:45 – 15:15</b>	Intercompany agreements
<b>08   15:15 – 16:00</b>	SaS – Viya
<b>09   16:00 – 17:30</b>	Recap





## Agenda of UX Day

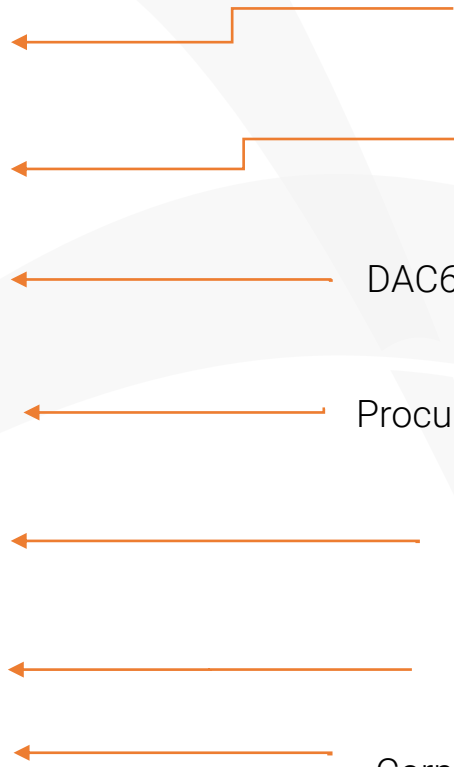
- Do you have what it takes in order to stay relevant in the future?
- New tax professional attributes:
  - What will change in the future?
  - What are the core competencies of the future?
  - New day of working
- Memory trainer on Tax & Technology-sync terminology with other user participants
  - Based on the Tax & Technology course (see index attached)
- Memory trainer on IT specific, enhance IT lingo as tax professional
  - Check your IT configuration

# Agenda of UX Day

## Hands-on-experience

### Test performed

- Receive a dataset & perform an outlier analysis
- Receive a local file & replicate it to another year
- Check the compliance of entities & how hallmarks work using multiple transactions
- Submit an RFP & receive a list of vendors that fit your requirements
- Receive a dataset to compare table 1, 2 & 3 of CbCR, perform an outlier analysis and make an XML conversion
- Analyze court cases
- Demonstrate the procedure from provision, to tax return and e-filing



Existing solutions from portfolio used by TPA Global

Focus Area	Cygnnet	TP-Genie	Blika	E-Bright	Legal	SeerTax
VAT TECH	Green	Blue	Blue	Blue	Blue	Blue
TP TECH	Blue	Green	Blue	Blue	Blue	Blue
DAC6 Assessment	Blue	Blue	Green	Blue	Blue	Blue
Procurement of tax Services	Blue	Blue	Blue	Green	Blue	Blue
CBCR TECH	Blue	Green	Blue	Blue	Blue	Blue
LEGAL TECH	Blue	Blue	Blue	Green	Green	Blue
Corporate Income Tax	Blue	Blue	Blue	Blue	Blue	Green



# General Information

## Who should attend?

This course is intended for any tax professionals looking to broaden their skill set on “tax & technology” and update their resilience to future changes in the tax profession.

## Prerequisites

- A questionnaire needs to be filled in beforehand for your own self-assessment.
- A basic knowledge of the tax system & workflows is required.

## Date and Time

The experience day is organized once or twice every month. You can find the exact date on our website and the workshop starts at 10:00 am and ends at 17:00 pm.

## Venue

Due to the current global situation, the user experience day will be an online event. Participants will be guided during the day by our facilitators.

## How to register

Please register online at [tpa-global.com/ux-day/](https://tpa-global.com/ux-day/)

## Participation Fee

Taking part in this experience day will cost € 1,000 (excluding VAT) per professional. Special group arrangements for corporates & other institutions are available upon request.

\* TPA / E-Bright under the GDPR regulations will delete any personalized detail after 48 h.

## Main Takeaways

### 1 Testing

Hands-on experience with different types of tax workflows “in the future”

### 2 Skill set

Deep understanding on skill set to stay relevant as a knowledge worker.

### 3 Assessment

Based on your evaluation at the end of the UX day, you will be provided with a personalized career path on tax & technology.





## **Your career in tax & technology**

**Launch of user experience day (UX)**

Transforming the world of tax

# Appendix 1- Index of Tax & Technology Course (1/2)

We recommend you to purchase a bundle that includes the online Tax Technology learning journey developed by e-Bright. This includes an extensive online tax technology course, extra reference materials, 2 memory trainers on tax technology and IT, and an e-exam. It is the perfect preparation for the user experience day! For more information and pricing visit [e-Bright](https://www.e-bright.com) or contact [info@tpa-global.com](mailto:info@tpa-global.com)

## 1. Tax for it

- 1.1 Which tax authorities worldwide are the most digitalized and which requirements are in place for MNEs?
- 1.2 Which digital trends are there in the world of taxation?
- 1.3 What is the focus of digitalization?
- 1.4 How to convert the information towards the needs of an MNE?
- 1.5 Universal Tax Audit file
- 1.6 Questions

## 2. IT for Tax

- 2.1 Heatmap – “an introduction”
- 2.2 Upstream: How do tax authorities get your data?
- 2.3 Downstream: How do tax authorities handle your data?
- 2.4 ERP and BI systems – high level introduction
- 2.5 Selection of software
- 2.6 What software is available?
- 2.7 Criteria to select software
- 2.8 Questions

## 3. Tax Technology roadmap

- 3.1 Defining your priorities concerning automatization
- 3.2 Objectives of the Tax Technology Project
- 3.3 Organization and Governance
- 3.4 Workflow selection
- 3.5 Output reverse engineering
- 3.6 Functionality selection
- 3.7 Project implementation
- 3.8 Case Studies
- 3.9 Questions

## 4. Tax Technology – soft skills and translation skills

- 4.1 Introduction on different professionals involved
- 4.2 Communication with boards
- 4.3 Communications with the finance department
- 4.4 Communication with the IT department
- 4.5 Project management
- 4.6 Questions

# Appendix 1- Index of Tax & Technology Course (2/2)

## 5. Data models

- 5.1 Types of data sources
- 5.2 Types of data models
- 5.3 Enterprise Resource Planning (ERP) and Business Intelligence (BI) as a base – the details
- 5.4 ERP plus modules – 1<sup>st</sup> and 2<sup>nd</sup> generation of tax technology
- 5.5 Cloud solutions and applications – 3<sup>rd</sup> generation of tax technology
- 5.6 Questions

## 6. Examples and cases

- 6.1 Today's practice
- 6.2 IT & Country-by-Country Reporting
- 6.3 Production calendar: overview with deadlines for the Local File, Master File, CbCR, CIT and TP Forms
- 6.4 Case studies 3 x 3 x 3 model: 3 regions (America's, EMEA, APAC), 3 roles (contract service, provider, lead service provider, service recipient), 3 entities (headquarters, business units, shared service centres)

## 7. Governance and organization of MNEs

- 7.1 Governance on tax workflows
- 7.2 Being in control
- 7.3 How to use RACI in the tax department
- 7.4 How to use RACI when allocating user right in IT solutions
- 7.5 Questions

## 8. Taxpayers' rights

- 8.1 Format rights aspects of real-time disclosure of tax data
- 8.2 Forms and disclosure process
- 8.3 Non-compliance on filings
- 8.4 Which type of algorithms are used by TA's
- 8.5 What do they need to share with taxpayers (court case)?

## 9. The new Tax Professional

- 9.1 Changed roles on tax professionals
- 9.2 Impact on in-house
- 9.3 Impact on tax authorities
- 9.4 Impact on tax consultants

## 10. Trends in the next 2 years

- 10.1 How AI and blockchain will drive self-assessment by taxpayers – generation 4?
- 10.2 How much more taxation will be based on intermediaries?
- 10.3 How 80% of all tax workflows will run on 'ERP-on-TAX' platforms and as a consequence convert tax into a sub-process of finance
- 10.4 How digital economy tax policy considerations will drive alternative ways of taxation

# *Thank You*

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Our global network covers over 5,000 professionals who enable us to deliver scalable solutions in the area of tax & legal, digital transformation, running a compliance factory and effectively dealing with dispute resolution.

To ensure the highest quality and seamless service provision, thereby meeting international standards and regulations, a global team of dedicated professionals and specialists is a key and determining factor.

Through linking three ecosystems: Tax, Transfer Pricing and Valuation, Tax + Technology and Tax Litigation and Mediation – we deliver a world of tax in control.

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