

Project Title - CRM (Sunsoft)enhancement in Universal Tax company

Prepared by - Aditi Joshi

Date - 10 June 2025

Situation/Problem/Opportunity

The current CRM system in the tax company has limitations in managing client interactions, automating tasks, and integrating with external systems like tax e-filing portals. Manual processes lead to data duplication, errors, and delays in responding to client needs. There's an opportunity to enhance the CRM system to streamline workflows, improve data accuracy, and boost client satisfaction.

Purpose Statement (Goals)

The purpose of this CRM enhancement project is to analyze, select, and implement improvements to the existing CRM system to better support the unique needs of tax services. It aims to streamline client interactions, automate document handling, and enable seamless integration with accounting and tax compliance tools.

Project Objectives

- 1.Enhance the CRM to support tax-specific workflows and document management.
2. Automate routine client communications (e.g., reminders for tax filings, payment deadlines).
3. Integrate with external systems like accounting software and

government tax portals.

4. Improve analytics and reporting for compliance tracking and client insights.

5. Strengthen data security and ensure regulatory compliance (e.g., data privacy, audit trails).

Success Criteria

✓ Improved availability and accuracy of client data and tax documents in the CRM.

✓ Reduced system downtime and faster response times for advisors and clients.

✓ Increased automation of tax-related workflows (e.g., automated e-filing reminders).

✓ Enhanced client satisfaction and reduced manual errors.

Methods/Approach

✓ Establish a project team including tax advisors, IT staff, and client service leads to define requirements.

✓ Conduct a comprehensive needs analysis, documenting tax-specific CRM needs.

✓ Select suitable vendors or enhancements via RFP and demonstrations.

✓ Develop and test CRM enhancements iteratively (Agile approach).

✓ Train users on new CRM features and establish a support process for adoption.

✓ Go live with the enhanced CRM system, with phased rollout and user feedback loops.

Resources

- People: Project team with tax advisors, CRM administrators, IT developers, and trainers.

- Time: Targeted implementation within 6–9 months, based on

project scope.

- Budget: Allocated budget for CRM licenses, integrations, and training.
- Other: Engagement of third-party CRM consultants, data security audits, and technical support teams.

Risks and Dependencies

- ✓ Current CRM familiarity: Staff may be comfortable with existing workflows, leading to resistance to change.
- ✓ Integration challenges: Ensuring seamless data flow with external accounting and e-filing systems.
- ✓ Cost justification: Although upfront costs may be significant, long-term benefits like error reduction and faster compliance are expected to justify the investment.
- ✓ Data privacy and regulatory compliance: High priority to ensure data is secure and compliant with relevant regulations (e.g., GDPR, data localization laws).

To be completed by Manager - John

Project Spouser - Avian

Project Manager - Rita