# Case Study Industry: Tax & Accounting



#### Client

The customer is one of the largest accounting, tax and advisory firm. They have expanded rapidly to become a premier organization providing their clients an edge in the competitive environment. They have their footprint in more than 30 countries.

#### **Executive Summary**

Being a major player in law, auditing and accounting field, the customer had clients in aerospace, defense, life sciences, technology and biotechnology fields. The challenges and scale of projects that come in such competitive environment has to be efficiently managed and delivered, achieving this level of efficacy required a tool that would help the customer streamline their projects and keep track of any shortcomings.

## Technology

- + .NET MVC 2
- + AJAX
- + jQuery
- + MS SQL Server 2008

#### Solution

The customer with their clients spread across different geographies had to operate in a multi-state, multi-line business model. The customer wanted a tool that can help them work in such complex structure, the tool should facilitate project management, resource management and cost management. When a new project is assigned the tasks are created in practice, the related data will be copied into the Product ion workflow management. This will become the system of record for tasks, projects and work done.

- + Developed and delivered a module that would enable the customer manage the projects from their intranet, create flowcharts and enable tracking.
- Created modules that would enable the different actors/roles vis-à-vis division leader, engagement leader, executive assistant and general user to change budgets, due dates or task assignments in accordance to their access rights.
- + Developed an application for resource management, which would enable the customer to keep account of resource usage and effectively manage the resource.
- + Integrated SQL Server Reporting Service (SSRS) to provide reports on routing charts, and Estimated Time Calculation (ETC).

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### Challenges

- + Integrating tools that should work independently, yet inclusively in a multi-line, multi-state model.
- + Time critical delivery.

### **Business Impacts**

- + Enabled the customer to manage projects effectively using flowcharts to determine the pace and continuity.
- + Optimized resource management by integrating a module that facilitates tracking and distribution of resources as required.

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