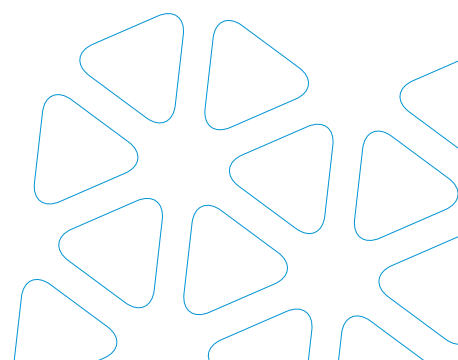


# Vertex: Building a Connected Enterprise

## A STORY OF OWNING CHANGE

Leading global tax provider Vertex Inc. transforms enterprise management, becoming a SaaS-based connected organization.



## Vertex Owns Change

Tax automation and compliance solution provider Vertex sought to modernize their global operations and integrate multiple enterprise platforms. Their vision required them to go beyond what preexisting integrations were capable of, posing the challenge of building something truly customized.

### **THE CHALLENGE: A COMPLETE SAAS SUITE** Boosting Efficiency With Operational Platforms

Vertex was on a journey of digital transformation and modernization. Their end goal? Build a 100% SaaS-based connected enterprise fueled by high-quality data. To maximize their operational efficiency, they adopted Workday, an enterprise management suite of solutions that specializes in finance and human capital management (HCM). They wanted to integrate all their desired tools into one system, including their Profisee and Salesforce environments. To achieve that, Vertex realized they would need to go beyond prebuilt integrations and build customized integrations to their exact requirements.

They also wanted to establish a model for ongoing technical support—to keep them running at peak efficiency while they adapted to their new tools. Vertex looked for a strategic partner that could quickly ramp up a team of experts with the knowledge and resources to provide that support. Enter TEKsystems.

### **OUR SOLUTION:** **BUILD, SUPPORT AND OPERATE** Modernizing Through Enterprise Integrations

Each custom integration was designed to modernize different aspects of Vertex's infrastructure. Taking manual operations and remodeling them to be SaaS-based makes Vertex more efficient, boosting productivity while mitigating the risk for human error.

The start of the project centered around achieving a stable environment by quickly addressing and resolving post-go-live configuration, security and integration issues. Our hands-on experience was invaluable as we helped build a highly complex set of integrations to meet Vertex's business needs. We utilized Talend to achieve a high level of integration with Salesforce, allowing for data to be easily pulled into Workday for both finance and HCM.

To improve their financial forecasting capabilities, we optimized Workday Adaptive Planning—one of the most critical functionalities. We defined and implemented live dashboards with metrics and KPIs to enable tactical and strategic decision-making and create a single source of truth for optimization results.

Many of the integrations that we customized focused on financial information. Other integrations improved Vertex's overall enterprise data quality. We built out the functionality of their Profisee MDM platform, eliminating redundant records. Vertex was also in the process of migrating valuable HCM data. We developed integrations to ensure we moved any critical HCM information safely and securely to a new environment.

### **POWERFUL PARTNERSHIP:** **HYPERCARE FROM DAY 1** Owning Operations With Dedicated Support

Post-go-live, we wanted to effectively own all ongoing support for the integrated applications. The key to delivering high-quality service? Hypercare. Hands-on from Day 1, we assigned core team members to aid with stabilizing the system in preparation for go-live, ongoing support and enhancement work. Through a staged approach of acquiring knowledge, shadowing and reverse shadowing, we took extreme care to capture all tasks in the backlog and allocate resources accordingly.

To provide the ongoing support that Vertex required post-implementation, we established a shift coverage model manned by a blended team of onshore and offshore experts. This team is made up of niche functionality subject matter experts with extensive knowledge of all applications involved, including Workday, Talend and Salesforce. They work closely with Vertex's internal resources, ensuring that any issues are properly escalated and quickly resolved.

## Real-World Results

Vertex's core platforms now communicate seamlessly with one another, and we continue to provide dedicated support. Moving their global operations toward a purely SaaS-based model provides Vertex with scale and agility. We've built more than 50 custom integrations with more in the pipeline. These integrations have resulted in a 48% increase in enterprise data quality for Vertex and operational improvements across multiple areas of the business. Growing their financial forecasting capabilities through Workday Adaptive Planning has resulted in wider adoption and usage of financial dashboards, empowering Vertex stakeholders with the ability to make informed decisions faster and boosting investor confidence in the accuracy of their reports.

With more projects in the pipeline and continued support from their partners, Vertex is well on their way to meeting their goal of becoming a 100% SaaS-based connected enterprise.

**98%**

enterprise data quality  
to inform trusted  
business decisions

**10x**

productivity  
improvement in sales  
and renewable business

**100%**

real-time access to reports of  
annual recurring revenue to  
speed decision-making

### About TEKsystems and TEKsystems Global Services

We're TEKsystems. We accelerate business transformation for our customers. We bring real-world expertise to solve complex technology, business and talent challenges—across the globe. We're a team of 80,000 strong, working with over 6,000 customers, including 80% of the Fortune 500 across North America, Europe and Asia, who partner with us for our scale, full-stack capabilities and speed. We're strategic thinkers, hands-on collaborators, helping customers capitalize on change. We're building tomorrow by delivering business outcomes and driving positive impacts in our global communities. TEKsystems is an Allegis Group company.

Learn more at [TEKsystems.com](https://www.teksystems.com).