

20 Years of Integrated Tax; 20 Lessons Learned

Presented by Chuck Adelman, Senior Tax Director



Tax Implementation Experience



- Full-time:
New Jersey, Kansas, New York City, Connecticut, Ireland, Maryland, North Carolina, Ohio, Detroit, Los Angeles
- Part-time:
Maine, Pennsylvania, California, Tennessee, Puerto Rico, Washington D.C., Arizona, Singapore, Malaysia, Australia, Kentucky

20 Lessons Learned



1

Don't convert any data!

SABER

20 Lessons Learned



2

Buy, don't build.

SABER

20 Lessons Learned



3

Overcommunicate.

SABER

20 Lessons Learned



4

There are no
external stakeholders.

SABER

20 Lessons Learned



5

Integrate agency staff with vendor staff.

SABER

20 Lessons Learned



6

The integrated tax project is a job, not a hobby.

SABER

20 Lessons Learned



7

Assign your *best* people to the project, not just *available* people.

SABER

20 Lessons Learned



8

Rollout by tax, but make all software changes and configurations upfront.

SABER

20 Lessons Learned



9

Change Management
is a job, not a cute hobby.

SABER

20 Lessons Learned



10

Change the
organization to adapt
to the software, not
the other way around.

SABER

20 Lessons Learned



11

Change the processes to adapt to the software, not the other way around.

SABER

20 Lessons Learned



12

Keep training as short as possible.

SABER

20 Lessons Learned



13

Trade bad requirements for good.

SABER

20 Lessons Learned



14

Parallel processing ensures failure.

SABER

20 Lessons Learned



15

Make decisions based on imperfect information.

SABER

20 Lessons Learned



16

If you are behind schedule, then you are behind budget.

SABER

20 Lessons Learned



17

Before implementation, clean up your SSNs and EINs, even if it means neglecting all other data purification efforts.

SABER

20 Lessons Learned



18

Start with a small tax first.

SABER

20 Lessons Learned



19

Save Individual
Income Tax for
dessert.

SāBER

20 Lessons Learned



20

Plan 1075 compliance
now, not later.

SāBER

Contact Information



Chuck Adelman
Saber Government Solutions
Senior Practice Director, Tax & Revenue

cadelman@sabercorp.com
(908) 397-2112

SABER