



## How we helped an international tax consultancy enjoy a critical boost to their efficiency

### Our client

A specialist tax consulting firm,  
with offices across the US and UK

### The project:

Our client had gone live with 3E prior to our relationship. We provided a team of dedicated, hands-on experts to provide post-implementation recovery and support. Our team solved the technical, functional and process issues that were having an impact on our client's business. And they continue to provide support and help our client get the most from the application.

### The project's scope

We deployed a rapid response team that included application and data consultants, 3E template experts and IDE developers. The team created a resolution plan that focused on complete remediation. And, as issues had become highly visible across the firm's leadership, they made sure they delivered some quick wins.

The team prioritized problems that were having a direct impact on our client's revenue. These included:

- Invoice and credit memo EDG templates
- IDE customizations related to remaining contract value, approval workflows, and reporting

### Outcomes

- Within 30 days our team had resolved the highest priority issues and were able to move on to address other system problems
  - We trained our client's finance team so they can use the new system with confidence and get the most value from it
  - The firm now has more automation across the 3E system which has reduced processing errors and the impact of employee turnover in their accounting department
  - We continue to provide ongoing technical and functional expertise to our client as an extension of their own IT team. We serve as a bridge between them and the accounting department, translating user needs into actionable tasks. Follow-on projects we have completed include enhancements to their billing and AR such as inter-company billing and implementation of the Purchase Order module.
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## Summary

Elite 3E is a comprehensive and highly flexible technology that can be customized to meet virtually any need. However, to make sure your teams quickly and easily adopt the system and that you avoid functional and technical issues – or even outright failure – you must understand what it can do and clearly define how you will use it.

The risk of failure is particularly high if you try and deploy 3E as an out-of-box solution in a non-standard environment.

Our team of experts has helped our client move from having a practically unusable 3E system to one that effectively supports the very unique requirements of their business.

## Pinnacle. Our team really is your team

Get in touch today

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