

TAX CENTER OF EXCELLENCE

CASE STUDY

SAPRO transformed global expansion challenges into seamless, scalable growth opportunities for a PE backed Firm

SCOPE

- **Global Expansion:** Scaling operations and integrating teams
- **Top-Tier Talent Sourcing:** Sourcing elite professionals across industries
- **Strategic Partnership:** Finding trusted partners for growth
- **Aggressive Custom Hiring Goal:** Demand to hire 25+ resources including Enrolled Agents, Experienced Reviewers, Staff, Admin, and Workforce Manager to deliver ready-to-sign off returns.
- **Cohesive Global Team:** Building a fully integrated workforce

SOLUTION

- **Strategic Talent Sourcing:**
 - Managed tax and advisory services.
 - Streamlined hiring and onboarding process
 - Competency based hiring
- **Optimal Resource Mix:** Optimized expertise, right mix of enrolled agents, preparers, reviewers and bookkeeping
- **Dedicated Integration Manager:** Led onboarding, quality oversight, and performance management

RESULTS

- **Fast Onboarding:** Integration of new resources within 3 months.
- **Stronger Team Cohesion:** Enhanced leadership and seamless integration strategies deployed to streamline the processes across client acquired CPA firms.
- **Scalable Growth:** Scalable growth model for future hiring needs.
- **Deliverables:**
 - **125%** utilization during busy season
 - **1,000+** returns delivered YTD
 - **35%** Margin Upliftment
 - Operational & Executive KPI led Reporting
 - Weekly Check-ins
 - AICPA driven checklists

CHALLENGES

- **Offshoring Challenges:** Firm partnered with SAPRO after facing competency and integration challenges with previous partner
- **Global Growth:** PE backed growth looking for offshoring-first solution
- **Acquisition & Integration:** Hiring and integrating skilled professionals
- **Diverse Skillsets:** Optimizing mix of junior & senior talent

CONCLUSION

SAPRO Partnership Accelerates Global Expansion

- Structured, efficient talent acquisition strategy
- Rapid onboarding and expert oversight
- Strong foundation for long-term success

FUTURE GROWTH

- **Scalable Growth Plan:** Double - digit global expansion roadmap
- **Enhanced Efficiency:** Optimized team management and strategic resource planning
- **Sustained Partnership:** Ongoing collaboration for long-term success