



## Customer Success Story: Vertex

### Overview

Vertex, Inc. makes tax compliance less time-consuming and more cost-effective for many of the world's most recognized businesses. As a leading provider of business tax technology solutions, this fast-growing, privately-held company improves tax processes with innovative software and services.

Given its focus on streamlining tax processes, the company has recognized the benefits associated with leveraging powerful technology to model, document and enhance its own key business processes.

### Challenge

*Optimizing Processes to Support Enterprise Agility and Corporate Growth*

Established in 1978, Vertex has a history of innovation driven growth and profitability. This requires deploying ever greater operational efficiencies, higher performance gains, and improved client focus, all of which can be supported by optimizing business processes.

In this spirit, the Process Management Center was formed to develop a core competency in process management and modeling. The center uses Metastorm ProVision within several important process-oriented projects to help Vertex align work with corporate goals and objectives. "As our company changes, our dynamic leadership and dedicated workforce continue to rise to the challenges we face as an organization," said Dave Curry, Vertex Process Management Director.

The Process Management Center team members – Curry, Bill Korba, and Chuck Fitzpatrick – attended ProVision training classes to augment their business process modeling and improvement expertise. Through a collaborative approach, the center's members support the leadership team responsible for enhancing core business processes – thus enabling Vertex to be

### Highlights

### Tax, Compliance & Technology

#### Challenge:

- To meet the growing demand for valuable resources in support of process-focused projects which align with portfolio objectives and segment goals

#### Customer Benefits & Results:

- Achieved clear process improvement in areas such as tax content management, human resources, and post-acquisition integration
- Enhanced market agility
- Improved levels of operational effectiveness

agile and innovative as it provides solutions to its clients.

### Solution

*Putting Process Front and Center*

"The ProVision enterprise modeling solution allows us to capture process and business information in a very efficient and effective way," said Curry. "ProVision has strengthened our ability to improve processes in support of Vertex's key business objectives."

Metastorm ProVision fits the bill at Vertex. It allows the Process Management Center to transform its process models into valuable corporate assets.

"The software makes a vital contribution to our overall endeavors," Curry said. "Our team depends upon it every day. Without it, we would be at a great disadvantage."

The center has created repositories of models that can be shared and refined.

"It allows us to document once, easily update, and reuse our models," Curry added. "During work sessions, team members typically project ProVision models on the screen to guide group discussions and planning efforts. This is a powerful collaboration tool."

The center uses Metastorm ProVision while leading or supporting significant process and structure initiatives including:

- Strategic planning
- Client contracts management
- Internal audit
- Human resources management

- Product management and development
- Content management for tax solutions
- New ventures

The center launched a new website on the Vertex intranet called “The Process Place.” It provides company-wide access to important process resources such as Metastorm ProVision models, process methodologies, and project information.

For Vertex’s process professionals, the intranet site represents an important best practice. Curry said that to fully capitalize on the impact one can bring with specialized process capabilities, it is critical to communicate those capabilities throughout the enterprise. This enables colleagues outside the Process Management Center to more easily understand how they can collaborate with enterprise process analysts and draw on those unique skills to achieve key objectives.

## Results

*Enhanced collaboration, informed decision-making and increased efficiency*

Vertex has realized many benefits as a result of process definition and improvement. For example, the center helped the company integrate one of Vertex’s acquired operations by working closely with a tax solutions unit. This helped the center strengthen efficiency while integrating with the entire organization. “We effectively used ProVision to model organizational structure, capture processes, and facilitate discussions around how to enhance procedures and workflows,” Curry said.

Metastorm ProVision has been used to enhance Vertex’s SAS 70 initiatives. SAS 70 defines the professional standards used by a service auditor to assess the internal controls of a service organization – in this case, Vertex – and issue a service auditor’s report. Process Management Center members partnered with a team focused on enhancing controls for processes that support the gathering and delivery of tax data to Vertex clients. Given the large number of control objectives that must be met under the SAS 70 audits, it is critical to define how best to strengthen and manage those internal controls.

Still another area to which the Process Management Center brought value was Human Resources. In a project jointly initiated by the CFO and the vice president of Human Resources, the center assisted the HR organization to increase efficiencies related to the employee life-cycle, beginning with on-boarding new employees and contract workers.

In addition, Korba and Fitzpatrick focused on a project to

formally document the company’s business planning process.

Having set out to sell the value of the center’s process improvement capabilities, Curry now finds that demand for the team’s services frequently exceeds supply. Central to the group’s success has been investments in world-class training and powerful tools for visualizing, analyzing, improving, and implementing processes.

“Models are a valuable form of knowledge for our company,” Curry said. “ProVision enables us to create models based on our core business and operational processes. This enhances collaboration, strengthens decisions and allows us to know more and do more.”

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