



The Advisor

(GCC Head)

"I know we are taking too long with our tax provisions, however, the pathway towards complete automation is not clear as yet"

DESIGNATION: GCC HEAD
NAME: RAJESH ANAND
AGE: 48
LOCATION: HYDERABAD
EXPERIENCE: 18 – 25 YEARS

KEY CHARACTERISTICS

Influence over purchase process

LOW For less mature GCCs For more mature GCCs HIGH

Involvement in buying journey

Phase & Outcome Initiate Purchase Integrate

Approval for business case Approval for vendor selection Approval for final vendor selection Tool impact on KPI realignment and business viability

KEY IMPLICATIONS FOR TR

- Key persona for TR
- Build an understanding of the overall impact of automation and the efficiency it could provide
- Build a case which would make it easy for the GCC Head to get a nod of approval from the parent

ROLE AT GCC

- Rajesh leads a GCC in India that manages insurance-based projects for their parent, based in Europe
- He moved to back to India 7 years ago when he was offered this position before which he used to head the finance vertical of one of the global subsidiaries in USA
- He reports directly to the global functional lead
- He is working towards helping the GCC become a CoE, however, he struggles to find good leader to help him get there
- He is investing in upskilling his talent in order to help them develop global thinking abilities and help him move up the value chain over the next few years
- Rajesh has a great deal of influence over the buying process, however, he needs a final nod of approval from the global lead

PREFERENCES

Professional aspirations

- To offering strategic value to the parent and move from being a cost center to one which provides additional value to the global business
- To transition the GCC into a CoE by recruiting new-age skillsets
- To create a pipeline of employable talent by partnering with academia

Technology and automation aspirations

- To procure tools which would help in the creation of a seamless reporting structure for tax compliance and report generation
- To create a digital mindset amongst GCC employees in order to incorporate digital ways of working within the DNA of the GCC

KEY INFLUENCERS

- Third party strategy and implementation partners (e.g., Big four, Accenture, Capgemini)
- GCC Network and marketing events / conferences
- GCC Functional Leads

PAIN POINTS / UNMET NEEDS

- Lack of efficiency
Direct tax requirements take the team up to 3 weeks
- High reliance on third-party partners
High reliance on third party consultants in order to provide relevant content
- Lack of talent with critical thinking ability
Talent, especially middle management, lack the ability to think critically in order to positively impact GCC's value offerings
- Complex and fast-changing gov. tax laws
Challenge around often-changing and complex laws and regulations makes it difficult to conduct efficient business
- Difficulty in changing GCC stereotypes
Challenge around convincing Global Leads that the GCC can move from being only a cost center to a CoE
- Difficulty in managing ROI expectations
Challenge around ensuring automation related activities take place in the defined budget

FEEDBACK ON TR TOOL

- TR teams provide better support and assistance than others



The Creator

(Digital Personnel – IT / Automation)

"My team and I generally get involved when we need to do a thorough analysis of the new tool to check if it is compatible with our current systems"

DESIGNATION: AUTOMATION TESTING MNGR.
NAME: KRISHNA SHARMA
AGE: 31
LOCATION: BANGALORE
EXPERIENCE: 8 – 12 YEARS

KEY CHARACTERISTICS

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Involvement in buying journey

Phase & Outcome Initiate Purchase Integrate

Evaluate the tool compatibility and quality Support for tool appropriate planning models Integrate tool with current system and handle new user

KEY IMPLICATIONS FOR TR

- Support function persona, not a decision maker
- Create a strong support program for both, tool evaluation and internalization
- Provide increased support post-purchase in order to help the IT team manage user queries and complaints

ROLE AT GCC

- Krishna works within the digital automation team at a GCC
- His main role is to research, program and deploy new software
- He needs to conduct a rigorous quality check and testing process in order to make sure the tool can be integrated
- He tries to make sure that each tool is seamlessly onboarded with minimal digital or human error
- He reports directly to the Digital Head who reports to the CIO and more recently, for business related aspects, the CFO as well
- Krishna has no direct influence over vendor approvals. His job is to do a thorough technical analysis of the product, suggest applicable licensing structures for commercial negotiations, conduct tool security related compliance and manage post purchase tool internalization

PREFERENCES

Professional aspirations

- To stay updated with the latest tools which can help drive automation for the business
- To work closely with the GCC Business Leads to provide them with an increased understanding around automation to help add value to the overall business

Technology and automation aspirations

- To find vendors who provide a seamless onboarding and integration experience for internal tech teams
- To streamline the vendor panel to a select few which would make vendor management and coordination easier

KEY INFLUENCERS

- Product outreach by vendors
- Third party implementation partners
- Digital publications / research / webinars / white papers

PAIN POINTS / UNMET NEEDS

- Late entry into the buying process
Delayed entry into the IT team in the buying process can lead to poor tool analysis or onboarding
- High reliance on vendor post-purchase support
High reliance on vendor post-purchase to answer any questions regarding bugs or discrepancies in the automation process
- Tedious change management
Working with internal users in order to iron out issues that arise in the first few months of using a new tool
- Lack of technical understanding from GCC leads
GCC Heads and Leads do not have a technical understanding of automation which can lead to delayed responses and lack of clarity

FEEDBACK ON TR TOOL



The Gatekeeper

(Parent / Global Leads)

"The reason for a new tool should always happen at the GCC, allowing for efficient standardization and rollout... we are working towards the same"

DESIGNATION: INTERNATIONAL TAXATION
NAME: JAMES COOK
AGE: 52
LOCATION: NEW JERSEY
EXPERIENCE: 20 – 30 YEARS

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KEY IMPLICATIONS FOR TR

- Key persona for TR
- Build an understanding of the short- and long-term business impact of the tool
- Provide input based on studies to be used as part of the business case created by the GCC for parent approval

ROLE AT GCC

- James leads the tax vertical at a global organization with GCCs in Mumbai and South America with all global tax leads reporting directly to him
- He mostly strategize and reports directly to the CFO and also regularly sits in an strategic meetings with the CEO
- James often travels to global offices to understand the challenges faced by local teams around tax reporting and compliance
- His ultimate vision is to help the office standardize their tax processes by centralizing functions at a new Center of Excellence which he plans to open in Mumbai within the next 2 years
- James' interest would be the final word in a buying process, however, he gets involved in the process details from the maturity of the GCC / GCC Head

PREFERENCES

Professional aspirations

- To build a centralized Center of Excellence to increase tax reporting and compliance efficiency across global offices
- To provide strategic advice to the organization's C-suite in order to help create value generating tax related impact and improve overall business efficiency

Technology and automation aspirations

- To have a centralized vendor who offers a complete suite of tax-related tools
- To deploy the best-in-class tools with price being second to functionality

KEY INFLUENCERS

- Third party strategy and implementation partners (e.g., Big four, Accenture, Capgemini)
- Marketing events and conferences
- Networking / peer groups and market leaders

PAIN POINTS / UNMET NEEDS

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FEEDBACK ON TR TOOL

- The TR tool has better statutory reporting capabilities when compared to the competitor



The Facilitator

(Procurement Manager)

"The process of onboarding a new tool can be long and tedious... It's important to have the buy in of all leaders, both internal and global"

DESIGNATION: PROCUREMENT MANAGER
NAME: RAYYAN MIRZA
AGE: 34
LOCATION: CHENNAI
EXPERIENCE: 8 – 12 YEARS

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KEY IMPLICATIONS FOR TR

- Support function persona, not a decision maker
- Offer support in creation of the RFP to ensure the tool is well placed against competition
- Provide contact customer care and service at all points of the pre- and post-purchase stage

ROLE AT GCC

- Rayyan's team of six manages the complete vendor sourcing, procurement activities, partnerships and ecosystem portfolio
- He reports directly to the Head of Sourcing and Procurement who reports directly to the Global Procurement Head
- His main responsibilities are to discover new suppliers and negotiate with vendors to secure advantageous contact terms
- He makes sure all levels of approvals are taken before purchase
- His other key functions include conducting legal and risk checks for all agreements and reducing overall expenses without impacting effectiveness
- Rayyan has no direct influence over vendor approvals, however, has certain influence while designing the RFP. His job is to conduct a thorough vendor analysis and push all new products to the Function Lead and GCC Head for them to consider further

PREFERENCES

Professional aspirations

- To ensure all procurement related best practices are followed in order to create a robust procurement process
- To provide strategic advice for cost-effectiveness in order to make sure that the GCC becomes more effective at its core functions

Technology and automation aspirations

- To find vendors who provide a suite of automation tools in order to get more out of a single vendor onboarding
- To have efficient internal management and a strong IT support team to make sure that the tool is onboarded with minimal issues

KEY INFLUENCERS

- Product outreach by vendors
- Third party strategy and implementation partners
- GCC business teams
- Digital publications / research / webinars / white papers

PAIN POINTS / UNMET NEEDS

- Complex approval system
Multi layered internal and global approval requirements for all new vendor onboarding
- Poor post purchase vendor interaction
High reliance on vendors post purchase for automation tool onboarding and internalization
- High reliance on complex and time-consuming technical assessments
High reliance on IT team during evaluation phase for efficient tech check and detailed demos might result in delayed overall timelines
- Late entry into the buying process
Delayed entry of the procurement team in the buying process can lead to poor tool analysis or onboarding
- Changing business requirements
Lack of clear tool need from business side leading to constant changes in procurement process and sourcing
- Changing RFP requirements
Constant changes from business team might result in changes made to the RFP leading to confusion with vendors due to new asks
- Evolving technology market
Possibility of a new company disrupting the market in between the procurement cycle with shortlisted vendors
- Negotiation with monopoly vendors
High reliance on vendors post purchase for automation tool onboarding and internalization



The Overseer

(Functional Leads – Tax / Finance / Supply Chain)

"I often offer recommendations to improve my team's efficiency, however currently still operating in a not considered a high priority task"

DESIGNATION: COUNTRY FINANCE CONTROLLER
NAME: PRIYANKA RUMAR
AGE: 41
LOCATION: BANGALORE
EXPERIENCE: 15 – 20 YEARS

KEY CHARACTERISTICS

Influence over purchase process

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KEY IMPLICATIONS FOR TR

- Strong influence, not a decision maker
- Create a clear understanding of the process efficiencies brought by the tool
- Showcase the state of use of the tool which will increase efficiency of the Functional Lead's teams

ROLE AT GCC

- Priyanka leads the US GAAP and local legal compliance and reporting for her GCC subsidiaries across the globe
- She was originally the Director for Global Collections and Accounts Receivable
- She is proponent of business process improvement and has the innate ability to manage a large team of global operations
- She reports directly to the GCC Head and regularly sits in on meetings that the GCC Head has with global leaders
- She spends her day advising and collaborating with her team and hearing discussions with function leads at global subsidiaries
- Priyanka has always suggest the purchase of a new tool to the GCC Head, however, the final purchase decision rests with the GCC Head and the Global Lead

PREFERENCES

Professional aspirations

- To provide strategic advice to and support Business growth for the GCC Head and global leads with regards to redefining business processes through efficient reporting
- To ensure improved efficiency of the team and user zero-wait queries

Technology and automation aspirations

- To move from region-specific solutions to more globally applicable ones
- To provide a new age skills for digital reporting in order to reduce handoffs and provide efficient financial reporting

KEY INFLUENCERS

- Third party strategy and implementation partners
- Contacts within the GCC India network
- Procurement team
- Automation / Digital Team

PAIN POINTS / UNMET NEEDS

- Poor alignment between business and reporting
Current statutory reporting is more a compliance work with no business analysis support provided by the team
- Lack of standardization
High reliance on region specific solutions
- Operationalization of automation tool purchase
Global heads prioritize purchase of tools which impact cost reduction versus revenue creation
- Long and tedious procurement process
Long wait periods between need generation for the tool and tool onboarding and integration
- Lack of end to end automation
Reliance on Big 4 and manual entry periods with tool usage

FEEDBACK ON TR TOOL

- Better language translation support, regular updates to content, and a highly available customer support team was why we chose Oracle's solution