

Xiaoshan (Shan) Sun

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KEY COMPETENCIES

- Tax innovation thought-leadership
- Strategic planning
- Project management & delivery
- IT solution architecture
- Tax transformation
- Data and analytics
- Stakeholder management
- Team management & support
- Strong communications
- Collaboration & relationship building

PROFESSIONAL EXPERIENCE

TECHNICAL SKILLS

- Data analytics and data science in tax
- Natural language processing applications
- ERPs: SAP, Hyperion and NetSuite, Salesforce
- Cloud data platforms: Snowflake, Azure, basic AWS
- Tooling: Looker, Tableau, Microsoft Power Suite (PowerApps, PowerBI, Power Automate), Microsoft Office and Collaborations, GitHub, Confluence
- Languages: Python (Pandas, Scikit-Learn), SQL, and Mandarin

ACHIEVEMENTS

- Working party member for the **Diploma in Tax Technology** qualification for CIOT 2023
- Public speaker at international conferences
- Chartered Accountant
- Chartered Tax Advisor
- Applied Data Science and Machine learning engineer Nano Degrees from Udacity
- Harvard CS50x Intro to Computer Science

Deliveroo

Jun 2022 - Present

Tax Technology Lead

- Act as a technology **advocate** across the tax function to the highest levels, gaining cross-function support for change and improvement, and **promoting** the value of technology in improving tax processes and outcomes;
- Create and roll-out a tax technology **roadmap** with **evolving priorities**, aligning with business goals and objectives;
- Product lead of a 5-engineer team to implement a **centralised tax calculation engine**;
- Deliver a **Tax-as-a-Service solution** to improve **customer experience**, **reduce errors** and non-compliance risk through the use of **data and analytics**;
- Provide **automated** solutions to support **business process changes** and achieve **operational excellence** (e.g. French platform economy tax reporting);
- Create **clear** technology **architecture** for implementing **transformation** projects under an **ambiguous** tax policy environment (e.g. DAC7);
- Utilise team **leadership** and **relationship-building** skills to collaborate with both business and technical stakeholders, aligning priorities and **managing expectations**;
- Interpret technical tax law to detailed requirements for tech and finance audiences, ensuring **compliance** with regulatory requirements.

Unilever

May 2019 - May 2022

Lead for Tax Innovation

- Led the **solution architecture design** for a **£2m+ global tax transformation** project, using ERP data and internal databases to build **detective**, **preventative**, and **predictive tests** on transactional taxes such as operational transfer pricing adjustments, VAT/GST, and withholding taxes in 20+ countries;
- Created and implemented **tax technology solutions** including:
 - a cross-border transactions **tax policy database** with an automated global policy exception monitor workflow,
 - a global **tax audit case status tracker**,
 - a mobile app to manage permanent establishment tax issues and cross-border transfer pricing compliance, and
 - **direct and indirect tax dashboards** covering 80+ countries, including CBCR analytics;
- Led **data analytics projects** including:
 - tax **classification** on the purchase-to-pay business cycle at the invoice level in the EU,
 - automated assignment of custom HS code, and
 - **governance processes and procedures changes** for associated **tax risk** management;
- Monitored and analysed **technology industry trends** and made **decisions** on the adoption of **new** and **innovative** technology using **internal or external resources**;
- Collaborated and communicated with **stakeholders** at the **highest levels** across functions and drove the **alignment** of business needs with architecture strategy.

EDUCATION

University of Nottingham, UK

MSc in Economics (with merit)

2003 - 2005

Ph.D Candidate (with grant)

2005 - 2006

University of International Business and Economics, Beijing, China

BSc in Economics (2:1 eqv.)

2000 - 2003

SELECTED PROJECTS

NLP-related projects

- A web app for custom HS code classification in the Philippines and Brazil
- Direct tax and WHT classification engine in Indonesia
- Tax code auto-tagging during P2P for EMEA
- Tax machine learning model governance

Data Analytics projects

- Global tax database for a unified tax portal
- Global indirect tax data analytics web app
- Operational transfer pricing projects (e.g. cost component analysis, profit split certification)
- CBCR data extraction and analytics

Tax apps and databases

- Global tax platform strategy and design
- Transfer pricing policy database and workflow app
- Tax audit case status tracker
- Tax technology catalogue web app

Omnicom Inc. (UK & US)

Jan 2016 - Apr 2019

Global Transfer Pricing Senior Manager, Data Scientist

- Provided **data analyses** to bring long-running audits to a close with tax authorities such as HMRC, IRS, NTA, ATO, and BZSt;
- Issued expert guidance on transfer pricing matters to local agency **CEOs** and **CFOs** in accordance with US treasury regulations, IRC s482, and OECD guidelines;
- Worked as a data scientist at an internal R&D lab utilising newly acquired skills in **data analytics** and **machine learning**;
- Offered **economic analyses** on debt restructuring and conducted thin capitalization analysis to ensure compliance with tax regulations;
- Demonstrated strong **project management** skills to ensure **efficient budget** and resource allocation, while also ensuring timely completion of projects;
- **Mentored** junior staff and participated in recruitment processes, helping to build a strong team and promote a positive work culture.

BDO LLP (UK & US)

May 2012 - Dec 2015

Transfer Pricing Manager

- Designed and prepared global and local transfer pricing documentation reports including **value chain** and **business driver analyses**, treasury TP on cash pooling, loans, insurance and guarantee fees;
- Conducted **financial modeling** to assess local market tax risk exposure and inform the development of tax risk management strategies;
- Led transfer pricing planning projects under BEPS and US tax reform and **collaborated** with **cross-functional** teams to ensure successful implementation;
- Drafted intercompany legal agreement templates tailored to specific transactions as part of a broader effort to **streamline** and **optimize** intercompany operations;
- Provided technical training to clients on TP principles and best practices, and responded to ad-hoc technical queries to support **informed decision-making**;
- Proactively identified, assessed, and presented TP planning opportunities to the international tax team and M&A tax teams, and supported their evaluation and execution.

Morgan Stanley

Apr 2011 - May 2012

Product Controller

- Monitored daily risk and profitability of commodity trading products, ensuring effective hedging strategies and monitoring of **market trends**;
- Provided clear and concise explanations of trading product risk exposure to **internal and external** stakeholders;
- Produced timely power forward curve validation and FX position reporting, using **analytics** and **data visualization** tools to identify **trends** and **anomalies**;
- Carried out **automated** month-end tasks related to controls, including review of cost center codes, to ensure compliance with regulatory requirements and **internal policies**.

KPMG LLP

Jan 2007 - Apr 2011

Tax Assistant Manager

- Prepared TP documentation and thin capitalisation reports (2 years), ensuring **compliance** with tax laws and regulations;
- Managed the preparation and review of corporate tax returns, and tax bookings (1.5 years), providing **timely** and **accurate tax advice** to relevant stakeholders.;
- Participated in a rotation program to audit (3 months) and indirect tax teams (6 months), gaining experience and insights into various tax functions;
- Utilised **forecasting** and **data analytics skills** to provide insights and recommendations to senior tax partners (3 months).