

Case Study

TAX SOLUTIONS



Facts at Glance



Organisation

Top tax firm in New Jersey



Service

Tax assistance



Industry

Financial Tax Accounting



Country

USA

About The Organisation

Jackson Hewitt Tax Service Inc. is a tax preparation service responsible for preparing computerized federal, state, and local individual income taxes.

They have served 10,000+ customers in the Bay Area over the past 18 years. Their customer base includes salaried employees (high-tech) or others, self-employed individuals, independent contractors, students, retired individuals, investment income earners, and small business owners.



The Project

The peak tax season was taking up all their resources, leaving them with little or no time to focus on their core functions. They were struggling to find tax preparers and seasonal talents in a cost-effective setting, who would work as an extended arm to scale quickly during the tax season.

They sought to outsource the activities to Ace Global to handle the peak season compression and workload issues by onboarding remote accounting resources and help them boost their revenue. Our resources helped them optimize the firm's capacity, organize tax-related paperwork for their clientele, and minimize errors.

Challenges

01

It was difficult to find experienced seasonal talent to prepare the tax returns coming their way during the busy season.

02

Training and onboarding talents to readily adapt to company standard operating protocols and workflow in a short period of time.

03

Increasingly complex finance and tax accounting needs due to the massive tax return rush.

04

Less time to focus on getting new clients and scaling the business due to being short-staffed.

The Results

- With this talent strategy, they were able to alleviate compression issues without quality loss while significantly saving costs and boosting profit margins.
- Built a remote team of 12 dedicated outsourced tax preparers over a period of 3 years.
- Their tax services are much more profitable by bringing down operations and hiring costs by up to 50%, and saving time, thus allowing them to add to your client list without compromising on quality and accuracy.
- With more time in hand, the in-house employees were able to focus on core services, increasing the productivity of the firm increased by 20%.
- The accounting talents in India worked for 6 days a week to meet deadlines ensuring fast and accurate services.