

# Alteryx Reduces Manual Tax Compliance Processes By 50%

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Serving clients and the firm with greater efficiency through automation and repeatability

Over its 30-year history, GTM has found new ways each year to improve its processes and tax automation offerings to better serve its clients as the business world changes. The firm has particularly seen how the power of data and analytics can be quickly adopted to unleash faster performance and better decision-making across its organization.

“Enabling our service offerings through the smart and advanced use of technology is a core part of our culture and business strategy,” says Ryan Lynch, Managing Director and Chief Growth Officer at GTM. “We continuously search for areas where we can automate to better serve our clients and address identified opportunities ambitiously. In addition, bringing more data-driven people into the organization supports us in taking that mindset going forward.”

## Automating a manual monthly compliance process

One such area of the firm that has been at the forefront of embracing automation is GTM’s Sales & Use Tax Compliance function – part of its Indirect Tax services group. “Sales and use tax compliance is a monthly repeatable process ripe for automation,” says David Hillegass, Managing Director at GTM. “As we take on more clients, we have to manipulate disparate data sources to prepare their tax returns and filing information to be remitted to the various jurisdictions. We also must reconcile what we pay on behalf of our clients to jurisdictions against what our clients have logged into their general ledger accounts. With data manipulation and reconciliations happening monthly and a growing volume of client returns, we needed to find a solution that was repeatable, user-friendly, and easily adaptable.”

“We started out with a free trial of Alteryx just to play around with the platform and then began to bring in licenses for our team to use,” Hillegass says. “As part of the larger firm initiative, our team participated in an enablement program with Alteryx Premier Partner Data Prep U to walk us through training and platform functionality, and to help us roll out the implementation process with greater ease.”

“With Alteryx, we’ve been able to significantly upgrade our automation as it relates to manipulating client data, performing reconciliations, and filing returns,” adds Hillegass. “What may have taken an hour before now takes a half-hour to sort through disparate client data sources. It has given us a 50% reduction in manual processes.”

## Benefits of using Alteryx

- Repeatable automation for monthly compliance process
- Easily adjustable for changes in data
- User-friendly interface for multiple departments to use



## One repeatable, user-friendly solution for substantial reduction in manual effort

“Alteryx has been an incredible solution,” Hillegass says. “We service a lot of clients on the compliance side to help with their monthly needs. If we’re not able to be highly automated through one repeatable, user-friendly solution for a substantial reduction in manual efforts, then our group would not thrive.”

“It’s created a feeling of excitement,” Lynch says. “Alteryx has been a spark plug for the organization to embrace technology more. People see the benefit right away, and they just want more and more of the platform as we go. It’s been a big catalyst for change and will continue to be going forward.”

## Continuing a culture of analytics across departments

As for what’s next, GTM will continue to upscale its workforce, get more team members certified, and continue to automate its processes across other departments and for their clients. “We want to fully adopt the platform for our entire group,” Hillegass says. “We think there are some steps in our current process that could be further automated, and we want to continuously deliver services for our clients in more efficient and innovative ways. I think we’ll be able to accomplish this since there hasn’t been an issue I haven’t been able to solve using Alteryx yet.”

“Data automation is quickly becoming a staple in the corporate tax department,” adds Lynch. “Tax has a lot of repetitive and intensive data needs ripe for next-level solutions. Leading tax departments are starting to hire people who have expertise in those solutions, even if they don’t have much tax experience, and that will likely become even more prevalent over time.”



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**David Hillegass**  
Managing Director, GTM

## How GTM Can Help

Our Tax Automation Services team tailors deliverables to each client’s technology environment, empowering teams to spend less time managing data and more time delivering strategic insights.



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