



# Client Case Study: Why Tax Needs a Seat at the Table

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Las Vegas

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**SAP**insider



## In This Session

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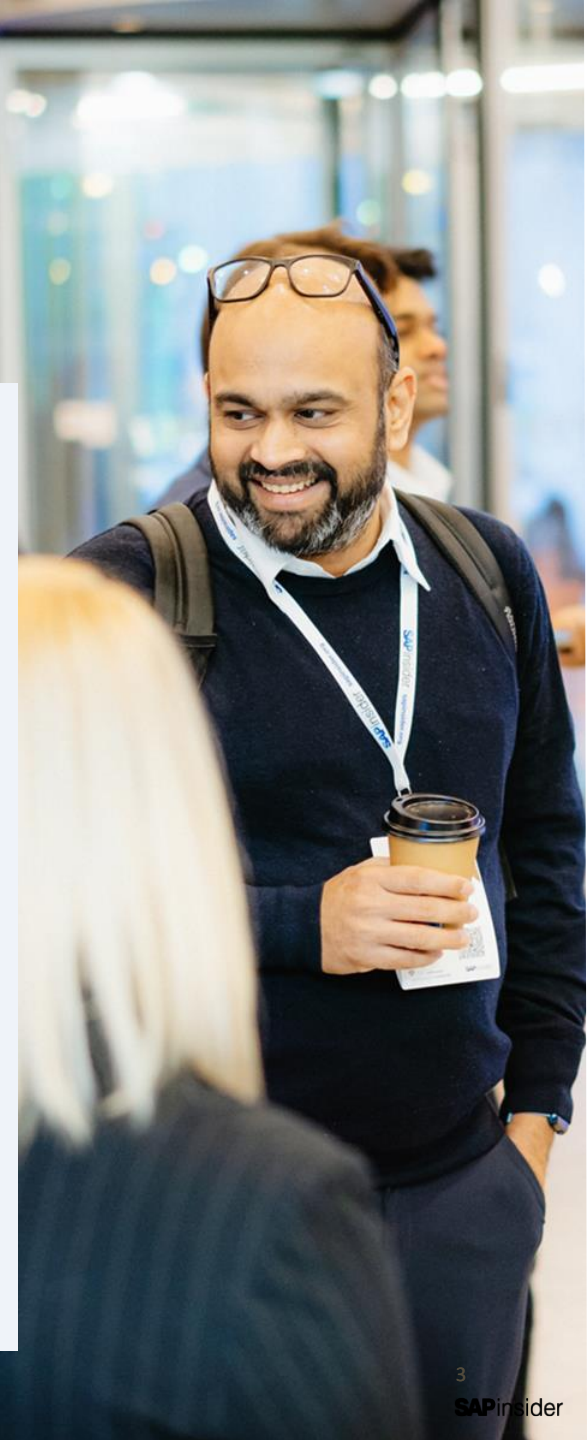
1. Learn Why Tax Needs to be Included in IT Projects & the Implications if Left Out
2. Understand the Benefits of Indirect Tax Automation
3. Discover Why an S/4HANA Project is the Perfect Time to Consider Tax Changes



# What We'll Cover

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- Introductions
- Tax as an Afterthought in IT Projects
- Benefits of Using Automation for Tax Compliance
- SAP S/4HANA Migration Tax Considerations
- Wrap-Up



# Introductions

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Tim Roden

Strategic Sales Engineer

Sovos Compliance

Sue Rogozinski

Manager, Sales & Use Tax

B. Braun Medical Inc.



# Tax Being an Afterthought

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Tax is a critical player in generating increased financial transparency ensuring cash flow, yet they have lived on the periphery of many important IT decisions.

Don't force Tax to choose between EFFICIENCY and ACCURACY.

Decisions made without consulting tax can have negative downstream impacts:

- Costly Fines
- Inefficient Workflows
- Resource Reallocation





# B Braun Medical, SAP & Indirect Tax

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- Who is B Braun Medical?
- SAP Experience
- Instances Where Tax was Not Consulted
- Role of Indirect Tax within the Organization



# Utilizing Automation for Tax Compliance

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What are the tasks required for tax compliance?

How is your organization currently handling?

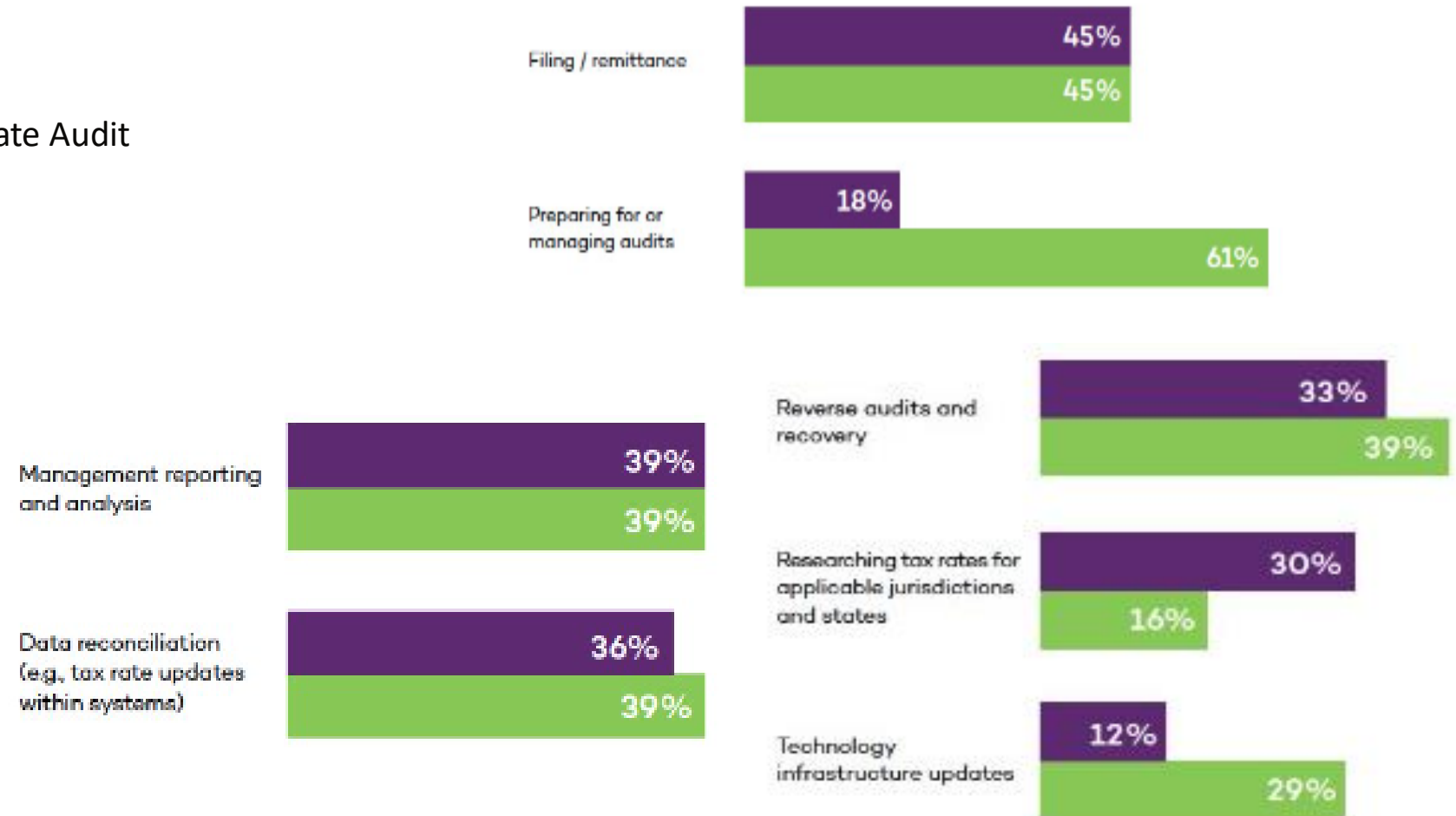
By not leveraging technology, you are putting your organization at risk.

# Why Automate Tax Compliance

- Gain Efficiencies
- Become More Accurate and Eliminate Audit Exposure
- Focus on Scalability

## What Resources Do Sales and Use Tax Compliance Consume?

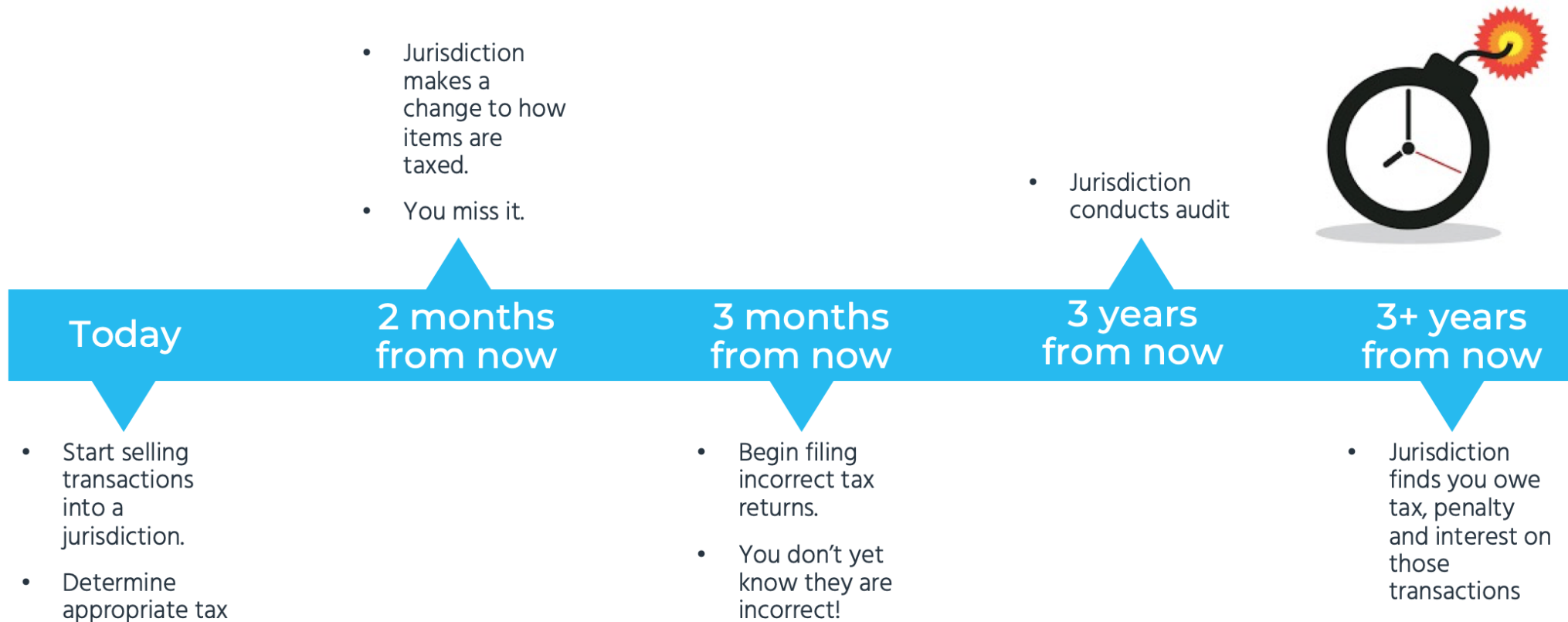
Phases or areas that are the most resource intensive for tax departments\*





## Risk of Manual Processes

# The Ticking Timebomb of Compliance



# How B. Braun Uses Automation for their Tax Compliance

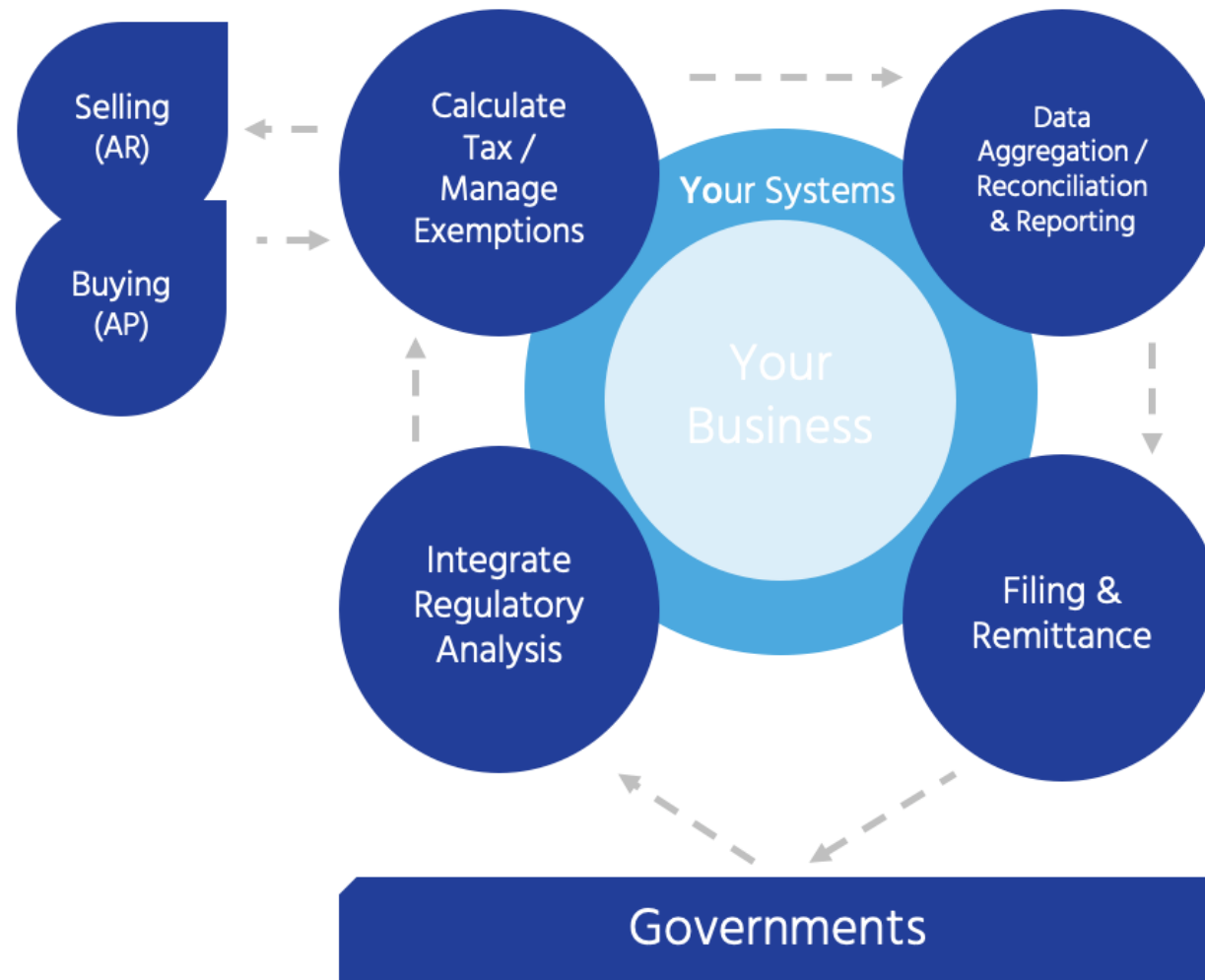
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- Integration with SAP Accounts Receivable modules
- Product Taxability at Category Level
- Granular Tax Jurisdiction Determination
- Automation of Sales/Use Tax Filing



# Indirect Tax Process Flow

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# Additional Areas for Automation

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- Accounts Payable Tax Automation
- Certificate Management
- Tighter Workflow Integrations with SAP
- Other Channels?

**B | BRAUN**  
SHARING EXPERTISE



# Areas of Indirect Tax to Automate

## Tax Determination

Foresight into changing laws so that when they happen you instantly calculate tax correctly

Rooftop level accuracy to determine appropriate taxing jurisdiction (12,000+)

Installed & integrated into relevant transactional systems

## Use Tax Accruals

Need to scrutinize purchase transactions to determine additional use tax liability

Account for goods movement across jurisdictions



## Exemption Management

Always on, air-tight paper trail of all exemptions to support audit inquiries

Indexed by jurisdiction, date and type of exemption

Easily reportable – both data and images

Automatically account for expirations and adjustments to exemptions

## Sales Tax Return Filing

Consolidate tax obligation from ALL sources

Reconcile against General Ledger

Populate returns with transaction data

Generate and submit tax returns to jurisdiction

Keep up with the pace of form changes

"We are on one consolidated tax engine system that accommodates our global business and taxation rules. Going with the SaaS solution has alleviated the onus on internal IT to continually maintain and configure the tax engine."

Joshua Klein  
Senior Developer, SAGE Publishing

# SAP S/4HANA Considerations

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The pace of regulatory change is accelerating.

While tax departments have been making do with legacy solutions, these are ultimately not sustainable.

Too often, tax is forced to choose between efficiency and accuracy.

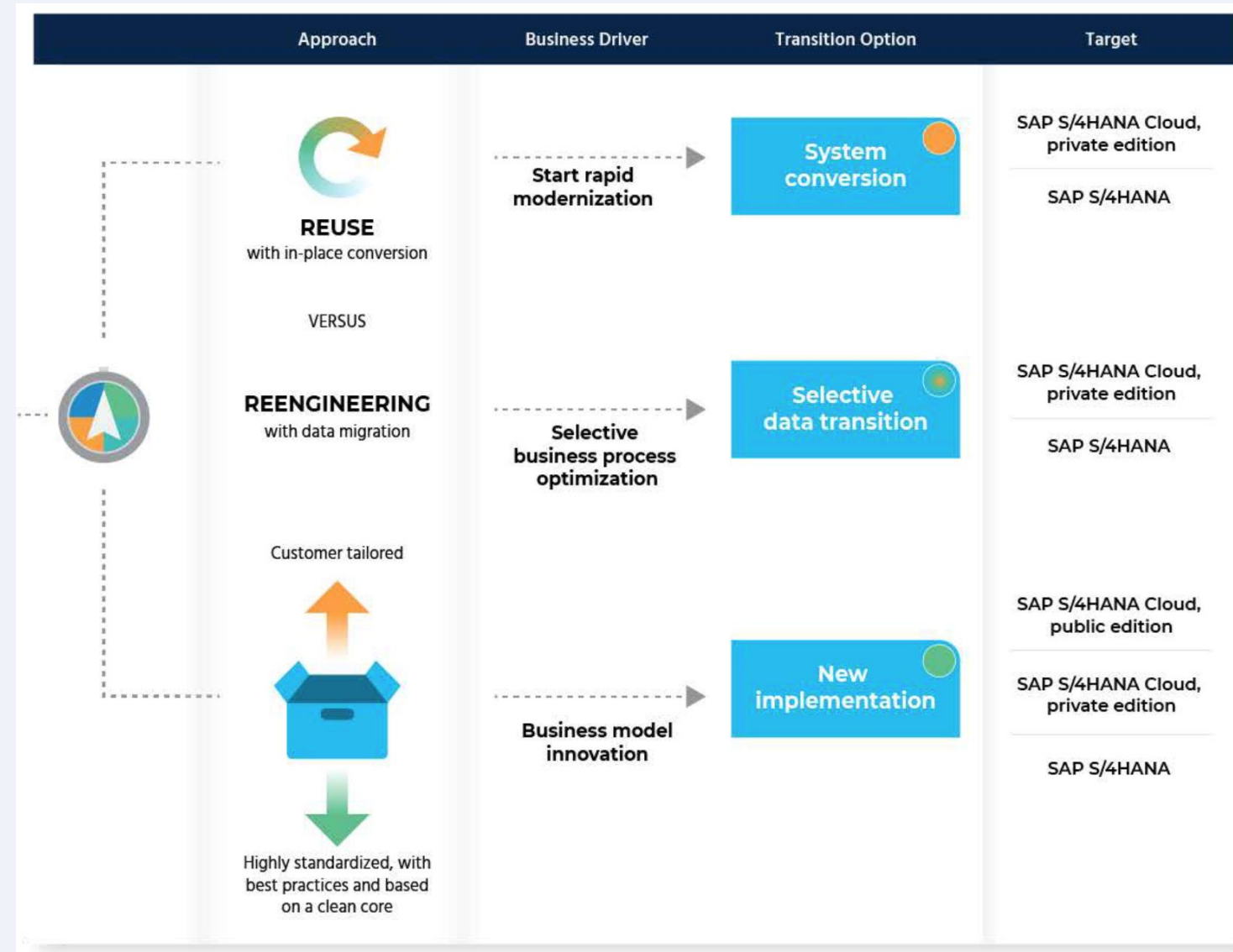
This is a losing strategy that results in either valuable resources being tied up for non-revenue-generating activities or assuming the risk of noncompliance.

SAP S/4HANA Migration is the chance for Tax to grab a seat at the table.



# Including Tax in Your SAP S/4HANA Journey

1. Select a Target System
2. Determine Migration Path
3. Evaluate Existing Indirect Tax Solutions
4. Define Geographic Footprint
5. Plan New Feature Adoption
6. Evaluate Existing Customizations
7. Analyze How Migration Impacts Downstream Compliance



# Wrap Up

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# Key Points to Take Home

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- Indirect Tax Compliance is Ever-Changing
- Legacy Solutions Aren't Enough – Embrace Automation
- Exclusion of Tax in IT/Finance Projects can Lead to Disaster
- SAP S/4HANA Migration Offers Organizations Ability to Reset
- Include Tax Early and Often in these Discussions



# Where to Find More Information

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<https://sapinsider.org/research-reports/tax-technology-innovation-and-automation-benchmark-report-sovos/>

- SAPinsider Benchmark Report: Tax Technology Innovation and Automation

<https://sovos.com/technology/integrations-api/sovos-for-sap/>

- Learn more about Sovos' integration with SAP

# Thank you! Any Questions?

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