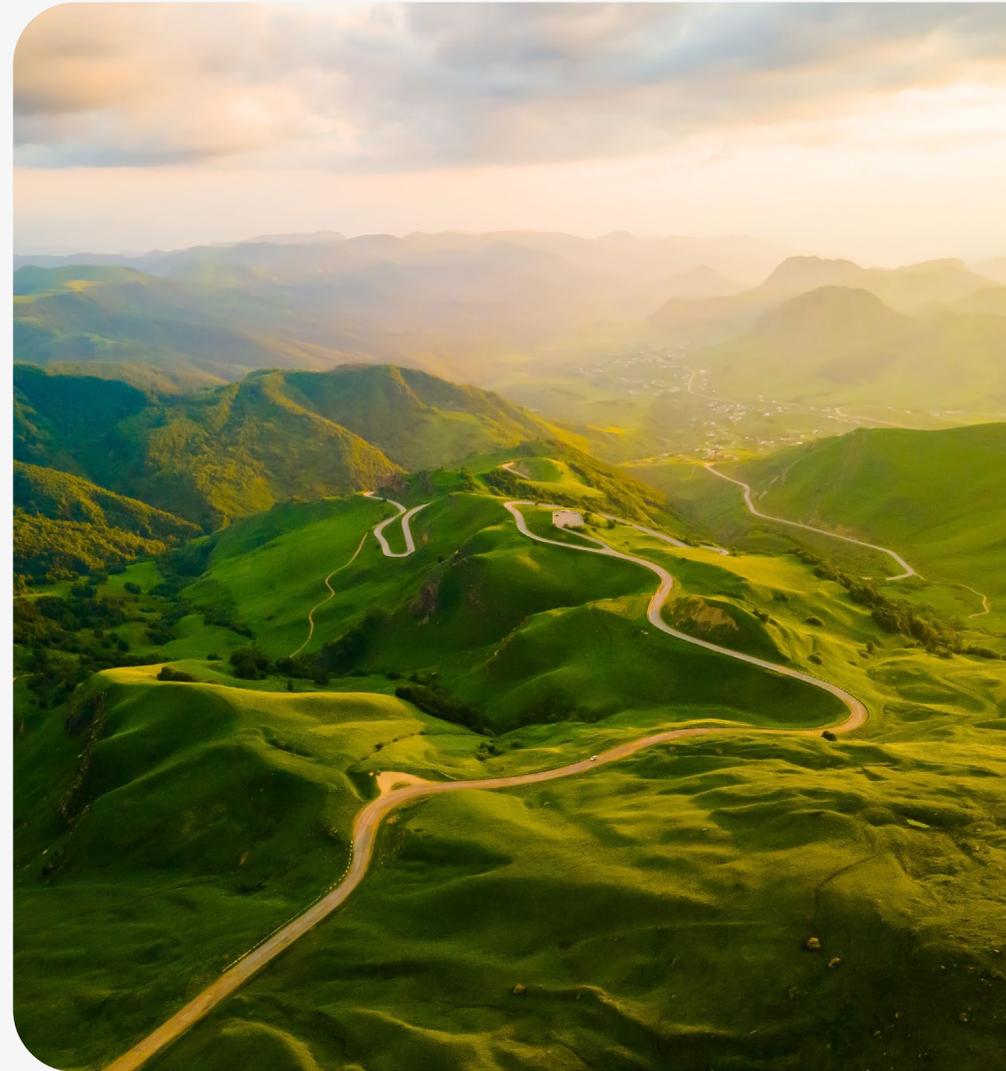




From Cracks to Stability: Why Making the Switch to the Right Tax Engine Is Worth the Effort



Introduction

Imagine driving through a neighborhood you admire and spotting the perfect house. You weren't planning to move—relocating is stressful and time-consuming. But then you start to consider the long-term benefits. A short-term inconvenience could lead to living in your dream home.

For many enterprises, switching tax engines feels the same way. The effort and disruption may seem daunting, but clinging to a tax engine that no longer meets your needs can be even costlier. Over time, small inefficiencies grow into major obstacles.

This e-book will help you identify the cracks in your current tax calculation foundation before they widen into serious financial and operational risks. Choosing the right tax technology provider can simplify the transition and deliver lasting improvements for your team and business.

Here's what to consider in your next tax engine provider—and why making the switch is worth the effort.



A Clear Focus on Indirect Tax

Some tax technology providers are doubling down on direct tax, drawn by its larger customer base, reduced competition and higher win rates. This means fewer investments in indirect tax, leading to slower product innovation, unreliable technical support and, in some cases, product discontinuation.

Where does this leave your business? You may find yourself using outdated indirect tax tools with no clear roadmap for future improvements. The lack of focus on indirect tax can result in products reaching the end of life without a clear migration path, increasing your compliance risks and operational inefficiencies.

The Vertex Solution

For over 45 years, Vertex has been singularly focused on indirect tax. It's our entire business—not an afterthought or a secondary offering.

“We are 100% committed to indirect tax solutions, ensuring that our investments, innovations and resources remain dedicated to delivering the most advanced sales, use and value added tax calculation and compliance tools available”, says Michael Bernard, VP - Chief Tax Officer at Vertex.

Unlike providers who must juggle multiple business lines and product portfolios, we continue to focus on evolving and enhancing our market-leading indirect tax engine without compromises.

A Single, Robust Tax Solution

Some tax engine providers rely on multiple, disconnected applications to meet various tax needs, such as separate solutions for sales tax, use tax accruals, value-added tax and industry-specific tax calculations. The lack of meaningful integration between these solutions often leads to siloed systems managed by entirely separate support teams.

IT teams then face considerable challenges in deploying and maintaining indirect tax solutions across different jurisdictions while ensuring seamless integration with existing systems. Managing these complexities requires substantial resources and technical expertise, adding strain to already stretched teams and increasing the overall cost of ownership.

Ask yourself: Do you have a single tax engine that centralizes all aspects of global tax determination in one place?

The Vertex Solution

Vertex offers a single tax engine that supports sales, use, value added tax as well as tax calculations for complex industries (oil & gas, leasing, communications, medical devices, hospitality and payroll). It's a powerful robust solution that allows you to license the tax content that you need today and add capabilities as your needs grow—without implementing another separate tax engine.

Strong Implementation and Ongoing Customer Support

Some tax engine providers lack focus on indirect tax which leads to high turnover rates, misaligned product development and inadequate customer support. Other providers claim you don't need a lot of support at all – “it's so simple you can self-implement”.

Ask yourself: Do you feel like your current provider left you hanging once the ink dried?

The Vertex Solution

Vertex takes a pragmatic, experience-driven approach to implementation. We don't over-promise—we ensure success through measured, well-planned deployments.

Our implementation teams are well versed in migrating from other tax engines to Vertex.

We have a dedicated support team and offer [implementation services](#) that deliver a combination of expertise in ERP systems, technology, tax operations and tax automation solutions, with experience in over 2,000 implementations.

Our guidance goes well beyond implementation:

- We provide expert support through our Customer Success organization, part of our Customer Center of Excellence.
- We are the only tax technology provider to earn [HDI Support Center Certification](#), underscoring our commitment to superior customer service.
- We have been recognized with [the IDC SaaS Customer Satisfaction Award for Tax](#) three years in a row—leading in customer satisfaction for SaaS tax solutions.
- We also offer a range of [support resources](#), including in-app AI-powered assistance, user groups, our annual Vertex Exchange conference and extensive training options.



Dedicated, Long-Term Staff

Instability and high turnover among staff can be a significant problem for many tax tech providers, leading to lack of continuity and lost expertise. This can negatively impact product development and customer support, leaving you feeling neglected and under-served.

The Vertex Solution

Vertex prides itself on having a low employee turnover rate, with many customer-facing employees having more than a decade of experience. This continuity ensures that your account will always be handled by specialists who understand your business needs and the nuances of indirect tax. Many of our employees have previously worked in customer-facing roles elsewhere, bringing deep expertise to Vertex.



More Transparent, Predictable Pricing

Some providers have adopted a per-transaction call pricing model, where costs increase unpredictably due to API calls and address cleansing transactions. This is particularly concerning for large enterprises, where fluctuating transaction volumes can cause expenses to spiral unexpectedly.

The Vertex Solution

Vertex offers a straightforward, revenue-based pricing model that is:

- **More Transparent:** Costs are based on a metric that businesses can easily track and forecast.
- **More Predictable:** Companies avoid cost spikes due solely to transaction fluctuations.
- **Customer-focused:** A multi-year price lock ensures long-term stability.

Unlike usage-based pricing, our model is designed to align with a long-term Total Cost of Ownership (TCO) vision, giving businesses clarity and control over their tax technology investments.

“Fluctuating volumes, seasonal spikes, and business growth can all lead to unexpected cost increases, making it nearly impossible to forecast expenses accurately. A transparent pricing model ensures businesses can plan ahead without risk,” says Bernard.

Ability to Scale

Many tax engine providers struggle to support global operations, new business models or evolving compliance requirements. As companies grow, they may outgrow their tax engine, leading to inefficiencies, compliance risks and increased costs.

The Vertex Solution

Vertex is designed with scalability in mind. We can support your current setup and adapt as your needs evolve.

- **Global expansion** across multiple tax jurisdictions in 195+ countries.
- **Complex tax scenarios** across all tax types (sales and use tax, VAT, GST, plus industry-specific taxability for communications, leasing and more).
- **Seamless integrations** enabling you to connect to additional ERP, e-commerce and procurement systems as you grow through acquisitions, new product lines or multi-channel sales strategies.

Conclusion—Why Consider Switching Tax Engines?

Is your current tax engine provider focused on your tax needs now and in the future? Does their solution easily integrate with your changing financial ecosystem? Do you have ongoing customer support from dedicated, long-term staff? Can you easily scale your tax process for growth? Do you understand your costs, and do you feel you get value?

If any of these concerns resonate, it may be time to explore a tax engine that better aligns with your business objectives.



How Vertex Can Help You Make Your Move

Switching tax engines doesn't have to be daunting. With Vertex, you gain a robust tax engine designed to seamlessly integrate with your financial systems—one you can scale alongside your business and evolve to meet your needs.

- Our dedicated implementation teams specialize in migrations from other tax engines with deep expertise in major ERP systems.
- We provide full transparency on implementation timelines and costs.
- Our support structure ensures success beyond go-live.

The right tax engine should be an asset, not a liability. Making the switch to Vertex helps ensure long-term stability, compliance and efficiency for your tax operations.

Learn more about the [Vertex O Series tax engine](#) now.

Siemens Implements a Tax Calculation Engine Built for Growth with Vertex Consulting

“We were able to move 7 SAP systems off of our previous provider onto our new Vertex tax calculation engine, moved 3.5 million tax exemption certificates, and setup our use tax accrual program in less than 6 months.”

- Sandra Blair, Head of Indirect Tax, Siemens

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