



Driving Tax Transformation:

How Auto Club Group Streamlined Indirect Tax Compliance with Vertex and Workday



Introduction: The Keys to Implementation Proficiency and Agility

The road map for enterprise resource planning (ERP) system implementations with tax engine integrations is straightforward: engage a broad set of stakeholders, assign roles and responsibilities, design the foundation data model (FDM), consider taxability when establishing spend categories (for use tax compliance), nail the ERP-tax integration, conduct ample testing, and address post-implementation training and support needs.

Where the rubber meets the road is execution — navigating the unexpected bumps and obstacles and adapting on the fly. Successful implementations hinge on preparation, strong relationships, collaborative problem-solving and a forward-looking mindset. These drivers of success were on full display when Auto Club Group (ACG), the second-largest AAA club in North America, engaged Deloitte & Touche LLP to help them integrate the Vertex tax engine as part of its Workday ERP rollout. (This spirit of collaboration also resonates in the interactions among specialists from ACG, Deloitte and Vertex on the webinar that informs this paper.¹)

ACG leveraged a finance transformation underpinned by its implementation of Workday Enterprise Management Cloud to automate use tax compliance with Vertex's consumer use tax engine. In addition to automating manual tax rate monitoring and research, the Vertex suite delivered other improvements while paving the way for the deployment of additional tax automation solutions and tools in the future. ACG's implementation and integration success stems from:

- A commitment to collaboration
- A thoughtful business case
- Stakeholder alignment
- A well-designed, well-executed implementation approach
- Attention to training and future scalability considerations

“The key to moving forward with transformational activities is collaboration. Deloitte & Touche LLP, Vertex and ACG set a tone up front that strengthened our collaboration throughout the project.”

The Auto Club Group
Assistant Vice President
Jason Lockwood

The Benefits of a ‘No-Brainer’ Business Case

The business case for moving from manual use tax compliance to an automated approach was also straightforward: fewer errors and workarounds, greater efficiencies, and more time for ACG’s tax group to invest in strategic planning and analysis were compelling benefits for the project stakeholders.

ACG business and tax leaders, and Vertex principals, reported that these benefits were achieved and the implementation surpassed expectations. Challenges were addressed through a pervasive spirit of collaboration, stakeholder alignment, and excellent communications. Through collaboration, the team focused on goals and timelines while addressing unexpected challenges.

The primary benefits ACG has realized from the tax engine implementation include:

- **No more manual rate monitoring:** ACG no longer spends time researching and tracking tax rate changes across jurisdictions. Vertex handles all rate updates automatically.
- **Less time on taxability research:** The tax team no longer bears the burden of researching taxability rules for the commodities the company purchases (and, in some cases, sells).
- **Accounts payable (AP) efficiency gains:** AP professionals no longer need to make tax determination decisions, look up rates, or consult taxability documentation when processing invoices.
- **Enhanced reporting:** Reports from both Workday and Vertex provide greater visibility into tax data compared to ACG’s previous ERP system.
- **Vendor management and cashflow improvements:** The ACG indirect tax team can more effectively monitor when vendors are charging sales tax and when ACG is accruing use tax.
- **Improved accuracy:** ACG can now validate whether vendor-charged sales tax is correct based on Vertex calculations, identifying overcharges or errors in a more proactive manner. When overcharges and undercharges occur, the tax group has access to the data needed to quickly resolve those errors with vendors.
- **More time for planning and analysis:** The tax group is investing more time analyzing transactions, identifying trends, and performing value-added tax planning activities.
- **A strong foundation to support future growth and new automation:** With the Workday-Vertex integration established, ACG is positioned to leverage additional Vertex products (e.g., to support sales tax compliance) and features as needs arise.

“Prior to the implementation, our tax team was spending an inordinate amount of time monitoring sales and use tax rate changes. Now that Vertex handles this work, we’re doing much more of the strategic analyses we always wanted to perform.”

The Auto Club Group
Senior Financial Tax
Consultant
Kristy Paisley

A Responsible, Accountable, Consulted and Informed (RACI) Integration

While ACG's finance transformation drove the Workday implementation, the project management office (PMO) responsible for the project included an assessment of related pain points during its planning activities. Manual use tax compliance was identified as ripe for improvement, which led ACG to Vertex.

The Vertex-Workday integration required thoughtful coordination across multiple teams and disciplines, which in turn necessitated proper planning and clear role definition. The following approaches and considerations proved particularly valuable during the integration:

- The early establishment of roles and responsibilities:** The team emphasized the crucial nature of stakeholder alignment by addressing it early and methodically. A responsibility matrix was created to formally define who needed to be involved in each activity and at what level (responsible, accountable, consulted or informed – which is why the tool is also referred to as a RACI matrix). These communications requirements kept the project team informed and current on dependencies and timing.
- Engaging tax early in data modelling and conversion activities:** A member of the tax group helped define the Workday FDM and assisted in establishing data conversion rules for the procurement group's spend categories. Without tax's input at this project stage, categories might be structured to support purchasing needs without consideration of tax determination and calculation requirements.
- Keeping tax engaged:** The tax-ERP integration work that occurs during an ERP implementation is not linear; it often consists of numerous phases of work (product categorization, exemption management, etc.) whose timing is determined by the larger ERP implementation's progress and milestones. ACG's tax group remained actively informed of tax-related system design decisions even when ERP implementation workstreams were not ready for tax-ERP integration activities.
- A methodical approach to integration testing:** Vertex's prebuilt Workday Studio integration provides baseline functionality that can be customized to address unique organizational needs, such as those related to rules for validating charged tax and different accrual scenarios. The team created a detailed integration testing plan to progress through all of the testing requirements while determining whether tax calculations worked correctly. This work also included the configuration of spend categories, GL accounts, and vendor data prior. The larger project plan also addressed post-implementation support, focusing on the crucial 3 months following the go-live date (the "hyper care" period in Workday's parlance) to address issues and optimize configurations based on real-world systems use and transaction-processing
- Training precision:** Deloitte designed an effective training approach, including training materials that were tailored to different user personas (e.g., procurement, IT, tax, AP, etc.). For example, ERP users with the ability to make updates to master data (e.g., customer addresses, tax identification numbers, tax codes, etc.) received training regarding tax-related master data requirements. ACG also leveraged the Vertex Community, a one-stop knowledge and support portal for Vertex customers, to support user training and to access to a continuously updated knowledge base, customer support, product updates, user guides, webinars, and related thought leadership.²

"The responsibility matrix helped guide the process: from design, to build and configure, along with unit testing, data conversions to integration testing – and, ultimately, to going live and Workday Hypercare support afterward."

Deloitte Tax LLP
Tax Managing Director
Jim Sullivan

Pillars of Implementation Success

In addition to the integration practices highlighted above, the following decisions and activities had outsized impacts on the success of ACG's Workday-Vertex implementation:

- Phasing the implementation to fit the organization:** ACG staged the implementation to prioritize getting the new ERP system and tax engine in place before making changes to processes and roles. This approach prevented the team from tackling too much change at once. Following a planned 6-month maturation period after the go-live date, the project team evaluate procedural changes that will help optimize processes that take advantage of the new system's strengths. This way, users gain familiarity with Workday and Vertex via tailored training programs and actual experience so that they can better understand, and shape, subsequent process improvements and redesigns along with system configuration changes.
- Stakeholder alignment is an accelerant:** Terms like "collaboration," "cooperation," and "communications" arise frequently when ACG, Deloitte and Vertex specialists discuss the implementation. They also emphasize that an early and disciplined focus on stakeholder alignment enabled the PMO to quickly navigate issues and obstacles that otherwise could have delayed the project's completion.
- Customer references are crucial:** Prior to selecting Vertex as its tax automation partner, ACG invested considerable time obtaining customer references and conducting in-depth interviews with tax and IT professionals within companies that had recently implemented a tax engine, or were in the process of doing so. ACG also interviewed members of project teams that were in various phases of ERP and tax engine implementation — planning, mid-implementation, and post-go-live — to understand the challenges they were addressing at each stage.
- Tax stays on its toes:** Despite its lean size, the ACG indirect tax team embraced a proactive approach to involvement throughout the implementation. This focus and interest sustained even when the project reached points where tax's involvement was not needed. By remaining engaged, the tax team was knowledgeable about how the system was structured, which enabled them quickly progress with the integration work when it was time to do so.

"You don't want your AP clerk making tax decisions. It's also not ideal for your tax people to look up current tax rates or pore over a taxability matrix every time a vendor invoice is received. Those decisions and determinations can all be automated."

Vertex
Solution Engineer IV
Mark Bohlman





Conclusion: Beyond Roadmaps

ACG's journey demonstrates that successful ERP-tax integrations require more than following a roadmap. These projects also demand attention to preparation, collaboration, and future-readiness – important success enablers that help teams to navigate unexpected obstacles.

ACG's Workday-Vertex implementation also shows that strong collaboration between organizations, implementation advisors, and technology providers can help transform tax compliance from administrative activity into strategic advantage.

End Notes

¹ <https://go.vertexinc.com/l/514851/2025-07-29/j8kky3>.

² <https://www.vertexinc.com/support-services/vertex-community>.

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