



Smart Business Insight Suite

A PwC Product

**Transparency and control over your
processes, information and risks**

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Your challenges



Global process management and ever-changing regulatory requirements in finance and taxation pose many organisational challenges:



As a finance and/or tax department, how do I keep track of the state and responsibilities within the global processes, controls, risks and compliance obligations?



How can I collect financial and tax-related information from my organisation in a structured and efficient way in order to determine actions based on it?



How can I identify my financial and tax-related risks, track changes on an ongoing basis and initiate countermeasures?



Our solution: PwC Smart Business Insight Suite

The PwC Smart Business Insight Suite enables executives to meet ever-changing regulatory requirements with technological tools.

- Monitor your global compliance processes in a **management dashboard** and manage the **entire compliance cycle in real time**.
- Gather important management information from your organisation with the help of **questionnaires** and keep track of your process-relevant documents with the suite's flexible **document section**.
- Capture your **risks**, link processes and **controls**, and track the **risk progression**.

Transparency and control

- Integrated management of processes, information, control and risk
- Deadline management and reminder function
- Suitable for all tax and finance processes

Highlights

- Unlimited number of users
- High user-friendliness
- Customisable

Secure and quickly available

- Secure PwC-hosted (SaaS) in the EU
- Depending on your implementation needs, deployment time of 1-8 weeks
- Access for internal and external users

Globally manage your compliance cycle

The **PwC Smart Business Insight Suite** provides the tax and finance department with an integrated approach to managing global processes, risks and controls. It also enables the structured retrieval of control information from other departments as well as from the domestic or foreign subsidiaries. This enables collaboration between the finance and tax departments, other company functions and external advisors across multiple locations and time zones.

1. Overview in real time

You can define your relevant tax and financial processes according to country-specific requirements, plan them on time and monitor them via a global dashboard

2. Comprehensibility

Responsibilities are clearly defined, due dates are automatically tracked, any changes are logged



3. Data collection

You can create intelligent data collection forms for timely retrieval of key figures and crucial information from your organisation and integrate them seamlessly with process management

4. Evaluation

The reporting available in the system provides a strong foundation for creating your own analytical evaluations and for communicating trends and results more effectively to management

Modules of the PwC Smart Business Insight Suite



Smart Collaboration FEATURES

- Process management for both tax and non-tax processes
- Risk and control monitoring as well as connection with the processes affected by it
- Tracking of global compliance responsibilities
- Real-time status monitoring of ongoing processes and linked controls
- Centralised global document library
- Powerful and flexible reporting
- Intelligent automated notifications
- Straightforward autonomous system management



Smart Survey FEATURES

- Structured tool for data collection via questionnaires from the entire organisation
- Improved data quality and central access to data collected in questionnaires
- Delegation function supports collaborative sharing
- Interface with Smart Collaboration, enabling progress tracking per questionnaire and automatic email notifications
- Data export to MS Excel and other data analysis visualisation tools



Smart Tax Risks & Controls FEATURES

- Tax risk repository for recording and quantifying identified financial risks
- Monitoring of top global risks in accordance with risk impact and probability of occurrence
- Risk map with potential loss amount, probability of occurrence and risk history
- Interface with Smart Collaboration allows linking the risk to the risk-related process and the control process
- Audit log

Best practices and use cases

Automation technology company headquartered in GER: Management of global compliance obligations

- Headquarters coordination and control of tax returns prepared by external tax consultants
- System-supported recording of key tax data and information on the status of tax compliance
- Central control and assurance of deadlines for the worldwide filing of tax statements
- Preparation of reports in the area of tax risk management



Best practices and use cases

Automotive supplier headquartered in CH: Collaboration within the tax capacity

- Primary objective: better and more efficient insights of the central tax function into developments on location (decentralised structure)
- Desired side effect: uniform minimum standards in the sense of a “corporate culture” in taxation
- Monitoring of compliance processes in taxation
- Regulatory collection of various information, e.g. for risk management purposes
- Centralised management of financial risks in taxation



Answers to the most frequently asked questions

What is the deployment model?

The suite is provided to you as a SaaS solution, i.e. it is cloud-based and managed by PwC on secured servers in the EU. This means you can access all relevant information and documents securely from anywhere, even across different devices.

How is the pricing model structured?

The PwC Smart Business Insight Suite is provided as a SaaS instance. The annual SaaS fee includes PwC hosting (incl. management of servers, infrastructure, updates & patches, etc.), maintenance and the annual licence for unlimited use of the toolkit. In addition, there is no limit to the number of users, i.e. all internal and external employees can access the PwC Smart Business Insight Suite at the same time. The SaaS fee includes all costs for using the suite. For the implementation project, one-time costs are incurred in the amount of the expenses from the initial setup of the users until the end of the go-live support. Beyond that, there are no further set-up fees, service flat rates or other hidden costs for you.

What happens during the design phase?

As part of the implementation, we jointly conceptualise your relevant processes, tasks and questionnaires that you want to map in the PwC Smart Business Insight Suite. You also have the option of using a pre-configured system that already includes some standard processes and questionnaires for the tax department.

How is the PwC Smart Business Insight Suite maintained?

Following the implementation project, the PwC Smart Business Insight Suite can be adapted and customised independently by the designated administrators and Super Users. PwC does not need to be involved in this. However, we will be pleased to support you with the rollforward for subsequent years or in case of other support requests.



Visit our PwC Store! Here you will find further information and current prices for our product.

Redesign your global process management! We are pleased to advise you.



Matthias Walz | Partner | Corporate Tax | German CPA, Tax Advisor
matthias.walz@pwc.com | +49 711 25034 3203



Tim Oehrle | Senior Manager | Corporate Tax | Tax Advisor
tim.oehrle@pwc.com | + 49 711 25034 1456



Adrian Hirn | Senior Associate | Corporate Tax
adrian.hirn@pwc.com | + 49 711 25034 1088

