



Texas Tax Group

Business Case Study

Challenges: The Texas Tax group was looking for a system to efficiently manage its growing database and also improve the security of their sensitive data.

Solution: Rolustech implemented a custom Sugar CRM solution for their business which not only handled their large database with ease but also introduced the data security features previously missing.

The Texas Tax Group was established in 2007 by a group of former Texas Comptroller State Tax Auditors and today it is recognized as one of the leading state tax consulting firms in Texas. The Texas Tax Group specializes in managing state tax audits for businesses and CPA firms, and offers expert testimony and support services to law firms that are involved in state tax audit defense in District Court. Currently, the company has an exclusive team comprising of 15 auditors and offices located in Houston, Dallas, Austin and San Antonio.

Mr. Ted Hughes, who is currently the Director of Operations at Texas Tax Group, personally approached Rolustech in 2011. Ted was completely aware about the importance of adopting Customer Relationship Management (CRM) software for the Texas Tax Group. The firm had served approximately 500 clients and the numbers were continuing to grow, making it apparent that the Texas Tax Group was in need of software to manage its growing database. As a result, the company had already developed a basic CRM model which was delivered to Rolustech by Ted in order to be modified according to the needs of the Texas Tax Group.

One of Rolustech's teams led by Mohsin Zaheer collaborated with Ted to make the adjustments. Texas Tax Group was previously making use of QuickBooks to manage its data, but it had become apparent that QuickBooks did not have the capacity to handle the growing amount of data. One of the main issues was that the database was insecure since users could not be restricted from accessing confidential information on the database.

Rolustech recommended Sugar CRM to Texas Tax Group as it could incorporate the features of the basic model which Ted had presented earlier. Rolustech began by building a custom import process for all the financial data that had been collected by the Texas Tax Group. The next step was to develop an online plugin for QuickBooks, which enabled several integrations to take place such as, two-way data integration between QuickBooks and Sugar. Moreover, Rolustech ensured that the database became more secure by limiting users who could access confidential information.

Overall, Rolustech ended up syncing nearly 10 different modules to interact with QuickBooks. Ted highly appreciated the fact that Rolustech was able to understand the requirements of the Texas Tax Group and develop a CRM solution that could support its growing database. As a result, the company plans to collude with Rolustech in the future for at least four of the following projects; Act-on integration, Gmail integration, Skype integration and conversion to SuiteCRM.