

Accurate & On-Time Self-Assessment Filing With 50% Cost Savings



Geography

United Kingdom

Industry

Accounting

Services

Self-Assessment Tax
Return (PTR)

Client Tenure

3 Months

Case Study Period

3 Months

Client Profile:

A mid-sized UK-based accounting firm catering primarily to clients in the Construction Industry Scheme (CIS). The firm offers a range of year-end services, including accounts preparation, corporation tax returns, and self-assessment tax returns (PTR) for contractors, freelancers, and small business owners.

Solutions:

- Deployed an ACCA-qualified resource with domain expertise in UK self-assessment tax return filing.
- Used SAGE software for accurate and efficient filing of tax returns.
- Initiated the project with training sessions in mid-March. Went live in April; Operations commenced promptly at the start of the new tax year, enabling immediate processing of returns.
- Delivered consistent, high-quality output from the start, exceeding client expectations.
- Demonstrated strong ownership and accountability, leading to expanded responsibilities during the engagement.

Client Objectives:

- Onboard a qualified professional quickly to manage self-assessment tax return filings for end clients.
- Ensure accurate and timely delivery of returns within the limited tax filing window.
- Overcome challenges in hiring highly skilled UK-based professionals due to high costs and limited availability.
- Achieve significant cost savings without compromising on quality or turnaround time.

Impact:

- Delivered 25 returns per week, exceeding the initial target (20 returns per week) by 25%.
- Entrusted with additional responsibilities, including direct communication with end clients for document collection and submission of returns to HMRC.
- Realised 50% cost savings through offshore resourcing without sacrificing service quality or speed.