



Case Study:

Optimize Your City Taxes Through Technology

The Challenge

This Topia client is a private equity firm headquartered in San Francisco. The City of San Francisco, like many major US cities, imposes local taxes on revenue earned from employee activities performed within their city limits. In San Francisco, there are three combined taxes that can total up to 2.2% of total revenue, and it is up to the business to calculate their tax obligation and report it quarterly.

Due to the impacts of Covid, and subsequent transition to remote work, our client knew their employees were spending less time working in the city, but weren't exactly sure how much. With less work being done in the city, it was possible the client was overpaying their tax obligation.

Our client needed an audit-defensible way to accurately determine how much time was being spent by each employee working in San Francisco, but also needed a solution that:

- Respected employee privacy
- Provided auditable data
- Was easy to use by HR/Finance and employees
- Provided a positive ROI

The Solution

Our client needed a technology offering that would enable them to:

- Accurately monitor employee working time within the city of San Francisco
- Streamline tax calculations
- Provide reliable data in the event of future audits

A manual approach would not provide the level of accuracy required to help our client achieve their goals. Learning of Topia's success in helping organizations tackle local tax obligations in other cities, the client selected and began the implementation of Topia Compass.

About Client

- Private Equity Firm
- 100+ Employees
- Headquartered in San Francisco
- \$15B+ AUM



Our client decided to leverage the Topia Compass smartphone app across their entire employee population as the means to monitor and collect the work location of their employees. This enabled:

- Active tracking of employees' working location
- The ability for employees to control when location monitoring was on
- Quick review and validation of their reported working location as needed by employees

Because employee privacy was paramount, Topia was able to configure stripped-down HR/Finance dashboards and reporting that only provided a binary "In San Francisco" vs "Outside San Francisco."

The Results

Every day without this information represented an additional day of potentially inaccuracies. As such, the Topia team was able to work with the client to deliver the solution within a month. Now, their finance team has the information to accurately calculate their San Francisco city tax obligations, ensuring accurate payment without adding extra work. Plus, they have the data to substantiate their reporting in the event of an audit.

Because of their Topia Compass solution, our client is able to prevent an overpayment of taxes, save a significant amount, and recognizing a full ROI in the first quarter of use, all while protecting their employee's privacy.



About Topia

Topia is the leader in Global Talent Mobility. We empower enterprise HR teams to deploy, manage and engage employees anywhere in the world. The Topia Global Talent Mobility platform enables businesses to deliver mobility as part of a broader talent and business strategy with enhanced employee experiences. This drives competitive advantage by ensuring the right people in the right place at the right time. The Topia platform automates the entire global talent mobility process, from scenario-based planning, compliance risk management, expat payroll, reporting and more. Topia powers global talent mobility programs for many of the world's most trusted brands, including Schneider Electric, Dell, Veolia, Equinor, AXA. Topia has raised over \$100M from New Enterprise Associates (now NewView Capital), Notion Capital and others, and is a global company with offices throughout the Americas and EMEA.

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