

Guide

A Guide to Change Management for Tax Teams



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Introduction

Tax leaders face a pivotal challenge. Rising compliance demands, shifting regulations, and the pace of digital transformation have left tax departments stretched thin. While automation and new technologies should provide relief, they often feel like just another burden.

Adding to this strain, employee support for organizational change has dropped significantly, from 74% in 2016 to just 38% in 2022, according to Gartner.

Yet, standing still is no longer an option. Outdated systems and manual processes create audit risk, increase costs, and stall progress. The challenge is clear: How can today's tax leaders drive real transformation in teams stretched thin by burnout and change fatigue?



Behind The Words



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Tech Fatigue in Tax Departments

Before you fix tech fatigue, you must acknowledge it. 73% of change-affected employees are facing moderate to high stress levels, according to [Gartner](#). The cumulative toll of ongoing M&A activity, new ERP systems, regulatory shifts, and relentless compliance deadlines is uniquely amplified in tax environments.

Symptoms of Tax Tech Fatigue

- Growing resistance to new tools or processes
- Decreased engagement in training and system rollouts
- Turnover or “quiet quitting”
- Cynicism toward technological transformation or leadership

Unique Drivers of Tax Tech Fatigue

- Frequent regulatory change stifles innovation
- Tax teams inherit fragmented, legacy systems
- High turnover means institutional knowledge is lost
- IT-led projects, where tax voices go unheard

Practical Tips for Change-Resistant and Burnt-Out Teams

- Acknowledge burnout upfront: Be transparent about workload, stress, and fatigue.
- Adapt your timing: Avoid go-live during periods of peak compliance activity.
- Support your team: Reallocate work, bring in temps, or delay non-critical tasks to give space for adjustment.
 - Jenni Richter, VP HR Operations-Corporate & Technology at U.S. Venture, who is Prosci certified in Change Management, recommends the framework in the book “Victim, Survivor, or Navigator: Choosing a Response to Workplace Change” by Richard McKnight, PhD to coach team members through change.
- Let people feel emotions: Be mad. Be sad. But then, help them move forward.
- Mix up engagement formats: If team meetings are too routine, try informal lunches or breakout discussions to re-energize participation.
- Keep context front and center: Sometimes, regulatory changes force a compressed timeline. Communicate what’s controllable and what isn’t.

“Start by asking honest questions about team morale and readiness for change. Use short surveys or 1-to-1s to uncover underlying resistance.” -Amber Simonds

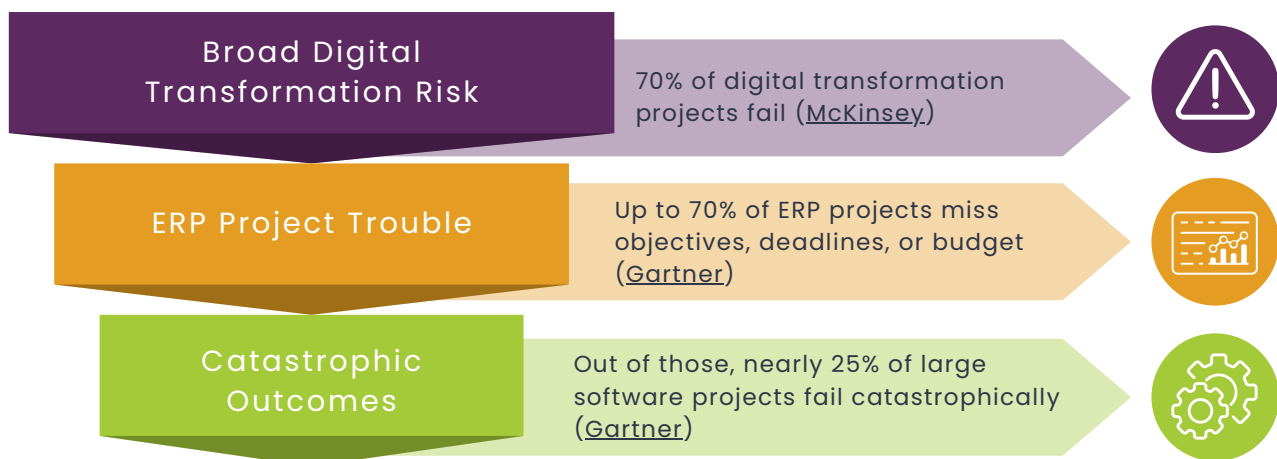
The Cost of Getting It Wrong

“Holding off” might seem prudent when the team is overwhelmed, but deferring change has real, escalating costs.

- Decreased productivity: Manual processes lead to errors and missed deadlines
- Higher audit risk: Outdated tools increase compliance exposure
- Growing frustration: Delays erode team trust and push talent out the door

Avoiding change comes with its own set of repercussions. But on the other hand, the road to transformation carries significant risks as well.

Consider these industry insights



Most failures stem not from technology but from poor project management, unclear accountability, and lack of stakeholder engagement, as cited by CIO.

“If a leader isn’t on board, the downstream effects—turnover, confusion, lost trust—can be huge.” -Jenni Richter



Leveraging **tax operations software** can increase visibility into workload, team processes, and risks for faster and more informed decision-making.

The Engagement Advantage

So, how do you ensure success with tax technology? The answer lies within the team. Stakeholder engagement is not just a box to check. It's the most powerful lever to move a change project forward.

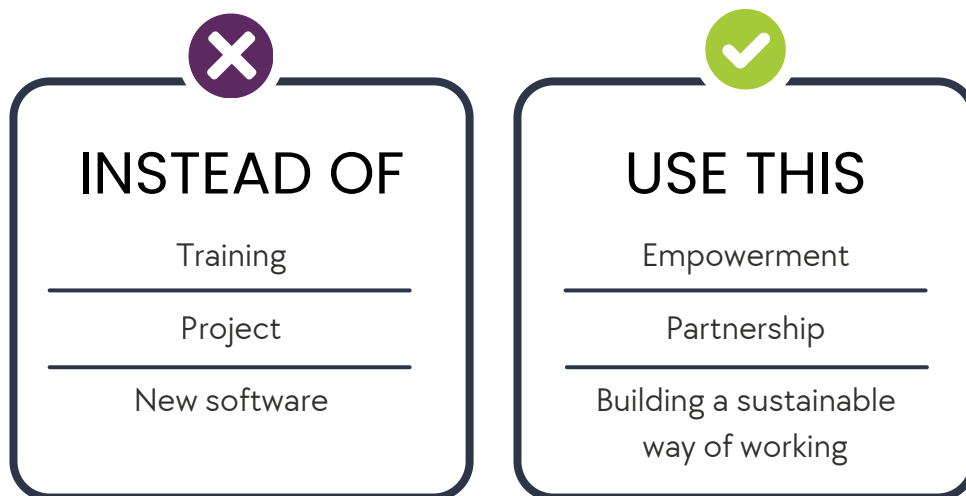
Why Engagement Matters

- Directly tackles a top cause of project failure
 - Gartner lists the top two barriers to new ERP implementation being resistance to change and inadequate internal sponsorship.
- Shapes stakeholder perception of success or failure
- Engaged teams are more resilient when issues arise

"You have to get people understanding the 'why' and showing how it will make their jobs more fulfilling." -Nick Milledge

Action Steps:

- Engage early: Bring the tax team into conversations before a solution is selected
- Communicate clearly: Explain not just what is changing, but why, and what this means for the team
- Create feedback loops: Use short quizzes, check-ins, and informal touchpoints to keep a pulse on engagement
 - Download a pre-made Google Forms survey to gauge team perception [here](#).
- Shift your language: Technology is a catalyst, not the solution. True transformation requires a culture change and that can start with the way you refer to that change.



Pro Tip: Treat buy-in like internal marketing. Sell the value to your team, not just the software.

Real World Leadership Lessons



Nick's Approach

Nick emphasizes early involvement, clear planning, and relentless empathy.

- Get buy-in by starting with why, not what
- Meet often (even daily, if needed) to keep communication tight
- Listen to individual fears and address them directly

"The better you know your people, the more you can help them get through change."

Action Step: Identify internal advocates who can sell the vision peer-to-peer. Don't just rely on top-down communication.



Jenni's Approach

Jenni focuses on the impact of being intentional, creating space and meeting people where they are at.

- In addition to messaging with a focus on "why", focus on answering "What's in it for me" (WIIFM)
- Give leaders time to process change before they deliver it.
- Be intentional. Use change impact maps to track who's affected internally and externally.
- Don't ignore subtle red flags: withdrawal, skipped meetings, heavy sighs
- Match message with the right messenger: 98% of employees prefer hearing from their direct leader over anyone else, including HR.

"You're going to spend the same amount of time on change—either on the front end with preparation, or on the back end cleaning up messes," Said Jenni.



Amber's Approach

Amber's approach is rooted in empathy, foresight, and adaptability, ensuring both the technical and emotional aspects of change are managed effectively.

- Start discussing changes as soon as the idea forms to bring the team along
- Tailor communication and support based on team members' personalities and preferences
- Plan changes around the team's workload and compliance calendar to ensure success
- Continuously ask for feedback and assess if the change is delivering the intended results
- Mix up how information is presented to keep the team engaged and motivated

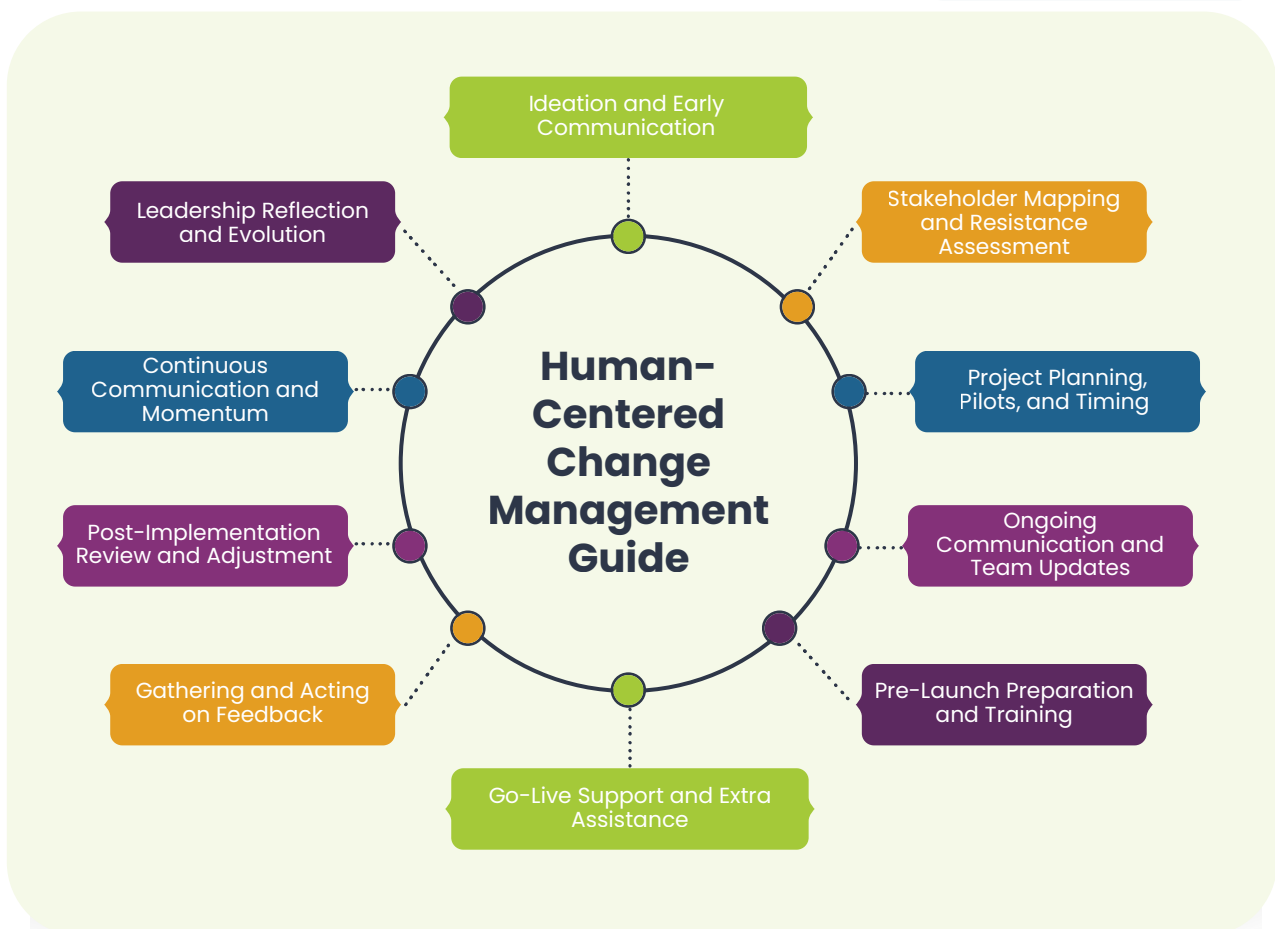
"At the end of the day, there's never going to be a good time. There are better times, but people have to move with us. The business moves too fast to sit back and wait."

Three Lenses on Leading Change



Human-Centered Change Management

Sustainable change happens when strategy meets empathy. Effective change management requires clear planning, active listening, and tangible wins that build momentum across a team. This consolidated guide blends a structured approach with a people-first mindset to help teams implement change that sticks.



Ideation and Early Communication

Start by sharing the initial concept and the underlying “why.” Early communication sets the stage and helps gauge team reactions, allowing you to adjust messaging before any major commitment. Listen intently to both vocal and quieter team members through surveys, one-on-ones, or informal check-ins. Provide anonymous channels to ensure honest feedback and surfacing of real concerns.

“Don’t wait until it’s ready to go live to start talking about it... bring them along the way.”
–Amber Simonds

Stakeholder Mapping and Resistance Assessment

Identify who supports your vision and who may have reservations. Set up individual conversations to uncover skepticism. Map the influence of key stakeholders and empower respected team members as change champions. Peer advocacy is a powerful lever for achieving team consensus and overcoming resistance.

Project Planning, Pilots, and Timing

Develop a detailed implementation plan that aligns with your team's workflow. For example, avoid launching new technology during your tax team's busy period.

Start small by piloting changes within one segment or process before scaling up. This approach reduces risk while creating space to celebrate micro-wins that build collective confidence. Allocate resources to support coverage and ensure a smooth transition.

Ongoing Communication and Team Updates

Choose multiple formats and channels to keep everyone engaged and informed. Frequent updates help maintain energy and visibility. Use regular meetings, newsletters, or digital platforms to reinforce progress and make early wins highly visible. Recognize successes and publicly celebrate milestones to reinforce momentum.



Create a cadence calendar like the one below, to organize your intentional messaging.

| Stage | Audience | Message Owner | Tone | Focus |
|---------------------|-------------------------|---------------|-----------------|---|
| Early Discovery | Selected sponsors | Head of Tax | Inclusive | "We're exploring solutions. Your input will help shape outcomes." |
| Project Kickoff | Entire tax team | Head of Tax | Inspirational | "Here's why this change matters—for you and your daily work." |
| 30 Days Pre-Go-Live | Department heads | Project Lead | Transparent | "Here's what's changing and how to prepare for it." |
| 2 Weeks Pre-Go-Live | Impacted users | Project Lead | Supportive | "We've heard your feedback. Here's how we're responding." |
| Go-Live Day | Entire organization | Head of Tax | Celebratory | "Today marks a new chapter." |
| 1 Week Post-Go-Live | Direct users | Project Lead | Encouraging | "What's working? What do we need to tweak?" |
| Ongoing Check-Ins | Cross-functional teams | Team Leads | Reflective | "Here's the progress so far and where we're headed." |
| Quarterly Retros | Leadership stakeholders | Head of Tax | Forward-Looking | "What did we learn? What are our next steps?" |

Action Step: Use a cadence tailored to the scale and complexity of your project. For major system changes, connect more frequently to resolve issues before they become blockers.

Pre-Launch Preparation and Training

Tailor training, information, and messaging to meet different learning styles and personalities and address specific concerns. Equip champions and advocates with the right tools and knowledge so they can lead from within. Comprehensive preparation ensures your team feels supported and ready for launch.

"The better you know your team, the better you can lead through change." -Nick Milledge

Go-Live Support and Extra Assistance

Be present and check in frequently as changes go live. Provide additional support staff and resources if needed, showing your commitment to the team's success.



Need help advocating for tax technology? Discover actionable strategies in our latest e-book, [Advocating for Your Tax Team](#). Learn how to make a compelling case for the tools your team needs to thrive.

Gathering and Acting on Feedback

Seek honest feedback on both effectiveness and pain points using surveys, informal conversations, and anonymous channels. Act on input to address issues quickly and demonstrate that team voices shape the process.



Click here to access a Google survey template for you to get a pulse on your team during seasons of change.

Post-Implementation Review and Adjustment

Measure outcomes against expectations and share findings transparently. Hold retrospectives and review sessions to reflect on what worked and what didn't. Adjust your approach and provide ongoing resources for continuous improvement.

“After implementation...go back and ask for feedback, “this is what we thought...are you seeing the results? If not, what issues are we having?” -Amber Simonds

Continuous Communication and Momentum

Maintain regular touchpoints even after initial launch. Periodically revisit progress, check in during regular team meetings, and keep recognizing achievements. This ongoing engagement helps the change become embedded in your culture.

Leadership Reflection and Evolution

Leaders should debrief and reflect on the change process, discussing both successes and challenges. Use those insights to refine future change management efforts, ensuring that every new initiative builds on what you've learned.



Lead with purpose

Change is hard. But the right change, done the right way, energizes teams, not drains them. The key is to lead with empathy, start early, and listen often.

Lead with purpose. And make sure every person, from staff to the C-suite, knows what that purpose is.

[Talk to an expert](#)

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