

Bloomberg Tax

Case Study

How a Major U.S. Airline Built Confidence in Its Tax Provision

How a major U.S. airline modernized its provision process

For this major airline tax team, a demanding close leaves little room for uncertainty. With staffing constraints and an acquisition adding to the workload, the team needed confidence in its provision calculations while keeping up with reporting deadlines.

Bloomberg Tax Provision provided that support during a high-pressure year-end close. The team's experience offers a concrete example of the value of dependable provision software as it pursues a broader effort to modernize its tax workflows.

Objectives:

- **Gain confidence in provision calculations** during stressful year-end close cycles.
- **Scale tax operations** for an acquisition and future business growth.
- **Reduce manual data preparation** across the tax lifecycle.

Results at a glance:

- Spent less time on review and validation, **streamlining a high-pressure year-end close.**
- **Improved reporting capabilities** with a review-ready rate reconciliation report.
- **Decreased manual effort** nd made plans to modernize other parts of the tax workflow.
- Gained traceable reports that made calculations **easier for auditors to review.**

The challenge: Managing deadlines amid business changes

Acquisition activity and limited staff made it difficult to find time for process improvements. The team had to meet immediate reporting obligations while also considering how to make its operations more scalable.

Manual work added to the challenge. In discussions about fixed assets, the customer described a process that was "100 percent manual," with Excel formulas providing the only automation. That workload highlighted a broader need to reduce hands-on data preparation as the business grew.

> "Being short staffed while going through an acquisition doesn't leave a lot of free time for anything besides just surviving every deadline that comes."
>
> - Tax Director

The solution: Provision software the team could trust

Confidence when the provision came under scrutiny

During one year-end close, this team was reviewing its provision at roughly 2 a.m. when the tax rate raised a concern. The team was scheduled to post the following day, making it essential to resolve the question quickly.

The next day, the team worked through the provision in detail to determine whether the rate change would affect all the existing work. Its review confirmed that Bloomberg Tax Provision's calculation was correct.

> "And, so the next day, we just kind of like meticulously are going through and sure enough, the provision was right."
>
> - Tax Director

The experience gave the team a specific reason to trust Bloomberg Tax Provision during a demanding reporting period. With deadlines approaching, the team could quickly investigate an unexpected result and confirm the provision before posting.

A rate reconciliation report the team put to use

The team's feedback also pointed to the usefulness of Bloomberg Tax Provision's rate reconciliation report. A senior executive member of the tax team described the report positively and confirmed that the team had used it.

> "[The rate reconciliation report] was honestly pretty awesome and we definitely used it. And so I think whoever created it did a good job."
>
> - Tax Director

For the tax team, confidence in the underlying provision and useful reporting both matter as the team works through the close.

The results: A tax workflow built to scale

Building toward less manual work

The provision experience sits within a broader relationship with **Bloomberg Tax**. This major airline is pursuing digital transformation and workflow automation to support growth while keeping tax functions in-house.

Fixed assets is an area of focus. The team has identified opportunities to reduce manual work by moving ERP data into tax workpapers. Its discussions with **Bloomberg Tax have included fixed assets** and workflow automation alongside a new ERP implementation.

Those efforts reflect the next stage of the team's modernization plans. Reducing manual data preparation would give the team a more sustainable way to manage an expanding workload and more capacity to focus on review and analysis.

A broader relationship across tax research and technology

As part of its broader relationship with **Bloomberg Tax**, the major airline also relies on **Bloomberg Tax Research** for authoritative content and AI-enabled research and drafting capabilities. The company is expanding adoption beyond individual users to support more of the team's work.

As the airline pursues modernization plans, its experience with **Bloomberg Tax Provision** provides a foundation for the relationship. The team has seen its provision calculation hold up under detailed review and put the rate reconciliation report to use. Its work on fixed assets and ERP-related workflows reflects a continued focus on reducing manual effort as the business grows.

Support confidence in your tax provision

Bloomberg Tax Provision helps tax teams manage provision calculations and reporting. Learn how it can support your team's close process and fit into a broader approach to tax workflow automation.

Request a demo of Bloomberg Tax Provision.

© 2026 Bloomberg Industry Group, Inc. 2030500 1026

Bloomberg Tax

To learn more, contact your Bloomberg Tax representative, call **800.372.1033**, or visit **pro.bloombergtax.com**