AVALARA · GLOBAL TAX COMPLIANCE SOFTWARE

Custom Training Case Study

How **Avalara** equipped 150 employees across multiple teams with actionable U.S. sales and use tax knowledge.

Avalara, a global provider of tax compliance software, helps businesses automate sales and use tax calculation, filing, and reporting across jurisdictions. As its customer base and product footprint expanded, Avalara identified a need to equip 100+ employees across multiple teams with a foundational understanding of United States sales tax. These employees needed practical, applied knowledge to effectively support customers using Avalara's solutions.

To address this gap, Avalara turned to the Sales Tax Institute for customized training that prioritized clarity, relevance, and real-world application. The program combined instructor-led sessions with a consistent storytelling framework that guided learners through evolving nexus and taxability scenarios. Each session balanced teaching with hands-on exercises, reinforced by comprehension-based polling, and used accessible language to ensure concepts were understood and retained across a diverse, global audience.

Our Approach

Sales Tax Institute partnered with Avalara to build a tailored learning experience that translated complex sales tax rules into clear guidance for a global workforce — emphasizing real-world application and consistent reinforcement over theory-heavy instruction.

- Conducted discovery sessions to understand workflows, systems, and baseline employee knowledge
- Built a modular course path from foundational concepts to specialized scenarios
- Developed hands-on exercises using the client's real business cases
- Integrated terminology, examples, and decision scenarios aligned to their products and customers
- Delivered materials in formats suited for both onboarding cohorts and long-term internal use

Our Results

Participants consistently described the experience as engaging, well-structured, and highly practical, with a clear connection to their day-to-day responsibilities.

100% of surveyed participants reported that learning objectives were met

84.9% said the content was directly relevant to their roles

81.1% walked away with new ideas they could immediately apply

This strong assessment was reinforced by participant feedback, with **81.1% rating the course as excellent** and **90.6%** highlighting that the materials and exercises were clear, easy to follow, and grounded in practical application.

100+	3-Day	Pune, India	Nov 2025
CROSS-FUNCTIONAL PARTICIPANTS	CUSTOMIZED PROGRAM	DELIVERED ON-SITE	PROGRAM DELIVERED

IN THEIR WORDS

"Working with Diane and Trisha from the Sales Tax Institute was an exceptional experience from start to finish. They delivered a three-day, highly customized United States sales tax training for Avalara in Pune, India, in November 2025, attended by more than 100 cross-functional team members.

What stood out most was the true sense of partnership throughout the entire engagement. Before the training even began, Diane and Trisha collaborated closely with me and other Avalara stakeholders, welcoming input on the topics, structure, and overall flow of the sessions. Their flexibility, openness, and willingness to tailor the content ensured the training aligned directly with Avalara's business needs and real-world customer scenarios.

During the training, they brought complex sales tax concepts to life through practical examples, real-life scenarios, and engaging discussions. Their deep expertise and passion for the subject matter created a learning environment that encouraged curiosity, confidence, and meaningful participation across a diverse audience.

The impact of this training extended well beyond the three days. Participants walked away with a stronger foundation in United States sales tax and a clearer understanding of how their individual roles support our customers throughout their tax journey. Diane and Trisha are not only outstanding instructors, but trusted partners who are deeply invested in delivering high-quality, customized learning experiences.

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Chere Bossard
Program Manager, GoLive Employee Enablement · Avalara







Effective sales tax education is not one size fits all. Tailoring training to a company's systems, customer interactions, and real-world scenarios strengthens retention, improves accuracy, and builds confidence in applying concepts in practice. Through instructor-led delivery, practical exercises, and business-aligned storytelling, Sales Tax Institute helps organizations move from awareness to operational readiness.

Built on deep expertise and purposeful customization, this approach reflects how people actually learn — accelerating onboarding, driving internal consistency, and enhancing the value delivered to customers.

Ready to elevate your team's expertise?

Let's design a training program tailored to your business.

Start the conversation