Key Capabilities of XCMworkflow® for CAS and Tax Departments

XCMworkflow® is the leading productivity enablement and workflow solution to enable tight alignment between Tax and CAS departments. For tax professionals who need to manage returns with multiple team members, and who require certainty that work will be completed on time, accurately and within budget, XCMworkflow offers unparalleled capabilities in a flexible and intuitive package.

**Use checklists to reinforce processes**

Across CAS and Tax, your firm puts a lot of work into establishing the best processes to provide high-service to clients — efficiently. With XCMworkflow, you can centralize those processes with checklists that reinforce the importance of teams sharing a common set of effective procedures.

**Assign tasks to individuals from a single hub**

In XCMworkflow, assigning specific responsibilities within a task to individual team members is as simple as pointing and clicking in your browser — no need for multiple emails to multiple team members.

**Associate client-specific project points with individual clients — permanently**

Every client is different, bringing their own quirks and unique requirements to the work your firm does for them. XCMworkflow points provide your team with a centralized location to store crucial task-specific information in a way that rolls forward with the task, through the months and years, so they do not get lost or forgotten.

**Easily link tasks between departments**

While many accounting departments operate within silos today, as a practical matter their projects and tasks are often tightly linked. XCMworkflow recognizes and enables these vital connections, providing intuitive tools for electronically linking tasks between departments. The result: smoother handoffs and deeper visibility between departments and heightened efficiency for the firm.

**Reduce project-related email volume**

XCMworkflow users benefit from a reduced email volume, whereas many workflow solutions rely on your teams' email inboxes as a communications hub. In XCMworkflow, team members are encouraged to extract only the relevant information obtained from any source, place it into the cloud-based platform and delete the email, rip up the post-it note and get rid of the proverbial Excel sheet. This way, the firm gains protection from the loss of information that occurs during inevitable staff turnover.

**Create groups combining similar or related clients**

When clients share attributes or needs, either by industry (for entities), by family (for individuals) or according to some other criteria, viewing them as groups can reveal points of connection or insights that can be valuable to the firm. In XCMworkflow, it’s easy to create groups and run reports on them to generate new insights, support and create niche offerings and provide a higher level of service.

Interested? Contact an XCM Workflow Consultant for more information 781.356.5152. Or visit xcmsolutions.com to learn how XCM can work for you.

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