ROADMAP TO IMPLEMENTATION

XCM provides guidance and collaboration using a 5-step implementation program that can be rolled out in just six weeks.

1. DEVELOP A STRATEGY
   Determine objectives and requirements you need to fulfill with XCM’s productivity enablement platform.

2. IMPORT DATA
   Let XCM help import your client and user data and assign roles internally.

3. CONFIGURE YOUR SITE
   Collaborate with an XCM consultant to set up your workflow processes to meet and exceed your needs and objectives.

4. GET EDUCATED
   Ensure your entire team understands your new workflow solution with XCM’s diverse training options.

5. LAUNCH
   Start increasing productivity, visibility, flexibility, accountability, and control with XCM.

Increase your firm’s productivity with XCM, your partner in addressing workflow and efficiency challenges.

Visibility: Having a 360° view provides the insight needed to make resource adjustments or changes.

Control: Identifying departmental bottlenecks and implementing process efficiencies will let you deliver quality results.

Flexibility: Enacting continuous process improvements will help deliver increasing efficiency.

Accountability: Gaining a real-time “single source” of the status for every assignment, task, and deadline supports greater accountability.

Contact an XCM Workflow Consultant for more information at 781.356.5152 or visit xcmsolutions.com today.