



PRODUCTIVITY, SIMPLY ENABLED™

THE PREMIER PRODUCTIVITY ENABLEMENT AND WORKFLOW PLATFORM DEVELOPED BY BUSINESS PROCESS EXPERTS IN TAX, ACCOUNTING, AND FINANCE

Your time is precious ... COUNT ON XCM to help you accomplish more with the resources you have. Powered by advanced cloud technology, XCM centralizes tax, accounting, finance, and audit processes within a single platform for end-to-end, streamlined workflow management. The holistic view of all work-in-progress helps leading firms balance workloads, proactively address bottlenecks before they become problems, and drive profitability.

Practitioners require a system to streamline complex, time-sensitive processes firm wide. With XCM, you have the peace of mind that your workflow solution:

- Standardizes and automates workflow across departments and offices, including audit, accounting, tax, consulting, and operations.
- Is consistently enhanced via a customer-guided development process.
- Is developed by a company that has been focused on delivering workflow solutions to the profession since 2002.
- Provides increased visibility, control, accountability, and flexibility.

The Value of Automation

When workflow is automated, productivity skyrockets. XCM offers a comprehensive system to monitor activity across departments and with exceptional detail—fueling efficiency firm wide. Consider the value:

A true workflow platform should offer your teams a way to coordinate, track and manage the work for every task and project, enabling you to improve productivity, accuracy, and efficiency across multiple departments and offices.

XCM Provides:

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.



Recover Billable Hours through Automation

Today's firms are focused on eliminating paper-heavy, manual-driven processes that consume countless non-billable hours. Consider the following example:

- By using XCM, a firm can save approximately 60-70 minutes of an employee's time each day.
- Therefore, if a firm employs 20 people
- And each employee works 100 days, at a fee of \$285-\$450/hour
- The firm can recover as much as \$570,000-\$900,000/quarter

With XCM, firms are armed with a powerful, cloud-based workflow solution to accelerate productivity firm-wide.

How XCM Works

XCM is designed to efficiently handle complex workflow across departments. Our customer-guided development process has benefitted from the insights and input shared by tens of thousands of users. Consider a few key advantages:

- **Custom homepage**—employees access a custom homepage to view an organized list of assigned tasks for easy online management of workflow.
- **Detailed project management**—project tasks move efficiently through your office and are easily viewed in one central location.
- **Powerful search feature**—allows you to quickly search work in progress and specific project details. Real-time access supports immediate response time when clients call with questions and requests.
- **Integrated scheduling**—enables dynamic, real-time management of resources firm-wide.
- **Integrated client portal**—allows you to easily and securely collaborate with clients on projects.
- **Powerful cloud- and mobile-enabled platform**—supports on-the-go, 24/7 access and integration with other leading solutions to support today's competitive CPA firms.



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