PEOPLE | PROCESS | TECHNOLOGY

XCM's productivity enablement and workflow platform has become a *key piece of the technology equation for tax*, accounting, and finance organizations as they move toward a real-time, on-demand environment.

XCM

PEOPLE

With XCM, you will be able to leverage your resources to the fullest. When staff know what to do, how to do it, and when it's expected—they naturally perform at a higher level. With XCM, management can deploy resources more effectively and invest their time in more strategic work, rather than focusing on the tactical. You can't buy more time—but you can get more from the time you invest.

PROCESS

XCM manages millions of processes per year, enabling professionals to complete more work, in less time, with greater quality. We bring all processes on one platform where you can control priorities, meet deadlines, and be responsive to the business. Flexibility is a requirement in today's dynamic business, and our adaptable platform enables you to manage changing resources, measure productivity, and optimize efficiency.

TECHNOLOGY

XCM offers a complete productivity enablement and business or workflow platform that helps you manage all types of work, within departments and/or across multiple offices. Our device and browser-agnostic cloud solutions offer real-time access to work, from anywhere. With so many disparate solutions in play, XCM's expertise in process excellence and our simple platform enable professionals get more done. We call it "Productivity, Simply Enabled®."

OUR PRODUCTS

XCMworkflow®

XCMworkflow is a scalable, cloud-based system that helps tax, accounting, and finance professionals be more productive through process and technology. We call this productivity enablement.

Use XCMworkflow across your Tax, Accounting/CAS, Audit, and/or Finance departments.

XCMworkflow®

for Tax

Public accounting firms and corporate tax departments that need to manage due date tracking, risk mitigation, work quality, and employee engagement will benefit from XCMworkflow for Tax.

for Accounting/CAS

Firms offering Client Accounting Services (CAS) that are looking to grow revenue, or businesses looking to standardize their processes, will benefit from XCMworkflow for Accounting/CAS.

for Audit

Audit departments that are looking to address challenges impacting engagement profitability, risk mitigation, client experience, work quality, peer review, and work/life balance will benefit from XCMworkflow for Audit.

XCMscheduler®

Integrated with XCMworkflow software, XCMscheduler delivers automated, real-time resource allocation for tax, accounting, and finance organizations. It also offers calendar-based scheduling that integrates with Microsoft® Outlook. XCMscheduler takes activity data from XCMworkflow to forecast your daily workload for real-time work assignment.

Resource Allocation Scheduling (RAS) lets you find availability based on role, skill level, work assigned, anticipated work, as well as budgeted or remaining hours, to more efficiently and effectively manage your team.

Calendar-Based Scheduling (CAL) helps you assign jobs that have a specific beginning and end point and integrates with your Microsoft® Outlook calendar for a seamless experience.
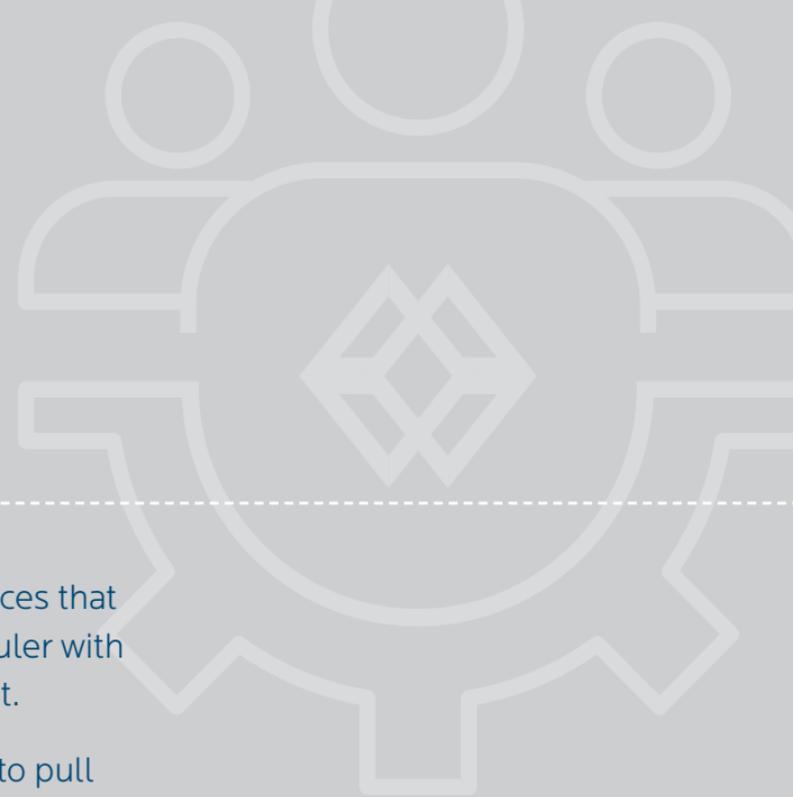
XCManalytics as a Service®

Measure real-time productivity by using your business's XCM data points in a highly visual, fully interactive dashboard. XCManalytics as a Service helps you benchmark your business performance by comparing key performance metrics to XCM's best practices and to other peer group comparative data.

Choose from the standard XCManalytics as a Service offering, or customize your own report and dashboard series with an expert XCM Consulting resource.

XCMapi®

XCMapi is a group of application programming interfaces that allow users to integrate XCMworkflow and XCMscheduler with other software systems, such as practice management.

Regardless of the software, XCMapi offers the option to pull and push client, entity, task, employee, or time data from other software systems in real time to facilitate workflow, increase productivity, and inform reporting.

Xpitax® Outsourcing

Stabilize staff bandwidth with world-class Xpitax Outsourcing services. Experienced tax professionals can prepare returns, and CAS professionals can help with back office accounting projects.

Xpitax Tax Outsourcing helps you manage your busy season. By outsourcing returns as they come in, you alleviate the "crunch" and realize significant cost savings. You don't have to change your process—we use the same tax software as you. On average, Xpitax Tax Outsourcing sends prepared tax returns with review notes back within 12-36 hours of submission.

Xpitax CAS Outsourcing is for firms that are looking to leverage virtual team members who are highly trained in technical skills that align with business needs. With CAS Outsourcing, you can cut staffing costs by up to 70% and continue to grow revenue, acquire new clients, achieve better utilization, standardize business processes, and deliver a higher level of client service.

XCM

XCM offers a complete productivity enablement and workflow platform that empowers you to manage all types of work, within all departments, and across multiple offices.

Interested in learning more?
Contact us today, and let us know how we can help!

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