



## DELIVER AUDIT ENGAGEMENTS ON TIME AND UNDER BUDGET

**XCMworkflow and XCMscheduler® for Audit** is a scalable, cloud-based solution that helps A&A professionals manage their pre-engagement scheduling and post-engagement reporting, peer review, and more. It's for firms who need a solution for the critical business process and resource challenges impacting engagement profitability, risk mitigation, client service, quality of work, peer review, and work/life balance.

It's for auditors and practice leaders who need to manage multiple engagements with multiple team members, to deliver quality client service, on time and under budget.

XCMworkflow and XCMscheduler for Audit helps deliver real-time access to key information during the planning, scheduling, and post-field work activities. It gives audit professionals an easy way to staff jobs with the right people, manage budget expectations, and coordinate operational processes and administrative requests.

Unlike other workflow or scheduling solutions, XCM shows real-time status and open items at any point in time, across all engagements. It streamlines data-gathering for peer review by keeping real-time data in one place so you don't have to manually aggregate it from multiple systems.

XCM drives productivity in your firm by standardizing business processes and providing one centralized

location for status updates and communication. XCMworkflow has built-in tools and functionality that enable audit departments to manage each client engagement through configurable, firm-specific workflows, processes, procedures, and terminology.

XCMscheduler empowers teams to allocate resources effectively and schedule engagements by client, task, employee, or groups of employees—on demand. Robust features enable teams to see the entire schedule, showing resource availability to ensure the right professionals are on the right work. If things change, XCMscheduler facilitates block movement of resources for reassignment. If you need to see professional staff availability, XCM's unique "heat map" shows all resources with their committed hours, making it simple to schedule staff in the present and the future.

Designed by business process experts, XCMworkflow and XCMscheduler for Audit aligns with your existing technology investments and integrates with many engagement and practice management systems for one comprehensive view of work.

XCM is customizable and flexible for firms of all sizes who want to scale their audit practice, remain relevant to their clients, and service new and existing business across multiple geographies.

**By using XCMworkflow for Audit, you will gain:**

**Visibility** to real-time status updates across all engagements

**Control** over quality of work, as well as budget and deadlines

**Flexibility** to configure and modify firm-specific business processes

**Accountability** across the firm, empowering staff to manage their own workloads

**Productivity improvements**, so that you can focus on growing your business



XCM works with organizations to reduce turnaround times on client deliverables, such as tax returns, Client Accounting Services, and Audit Engagements—delivering a 5 times return on their investment. XCM can benefit organizations who need to decrease business process timeframes by:

1. Streamlining work routing to address bottlenecks
2. Enabling full transparency—so nothing falls through the cracks
3. Reducing the risk of costly errors with multi-jurisdictional due date tracking

Unlike other solutions that can't be restructured after implementation, XCM allows you to configure business processes to the way you work. This is combined with real-time analytics and reports so you can make instant decisions on your business. Our unique focus on rapid deployment ensures a payback of less than one year.

XCM is the only productivity enablement and workflow platform endorsed by the AICPA, and complies with the controls and applicable criteria of the AICPA Trust Service Principles.



To learn more about how XCMworkflow and XCMscheduler for Audit can increase productivity in your firm, contact us at **781.356.5152** or visit our website at **[xcmsolutions.com](https://xcmsolutions.com)** today.