



DELIVER TAX RETURNS CORRECTLY AND EFFECTIVELY

XCMworkflow for Tax is for public accounting firms and corporate tax departments that need to manage tax return preparation and review, either for clients or for the business.

It's for organizations looking to prioritize due date tracking, risk mitigation, work quality, and employee engagement. And it's for tax professionals who need to manage returns with multiple team members where deadlines are critical and risk can be high. It's for tax professionals who want the certainty that work will be completed—on time, accurately, and within budget. It's also for tax professionals who need to streamline operational processes and administrative requests.

XCMworkflow for Tax helps deliver real-time access to key information when a client calls, or when a key stakeholder needs a status update.

Unlike other business process workflow solutions, XCMworkflow for Tax lets you modify existing business processes without rebuilding them from scratch. It also offers a central, easy-to-use location for storing points and unstructured information.

Help your firm be more productive by standardizing business processes and providing one centralized location for project status updates and communication.

XCMworkflow has the tools and functionality built in that enable tax professionals to manage each project through configurable workflows, processes, procedures, and terminology.

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

XCMworkflow for Tax is customizable and flexible for businesses of all sizes that need to do more with less, grow their business, and deliver a high-quality result—on time and under budget.

By using XCMworkflow for Tax, you will gain:

Visibility to real-time status updates across all tax projects

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

Flexibility to configure and modify business processes

Accountability across the business, empowering staff to manage their own workloads



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 for Tax can increase productivity in your firm, contact us at **781.356.5152** or visit **xcmsolutions.com** today.