XCMworkflow for Client Accounting Services (CAS) is a scalable, cloud-based solution that helps accounting professionals be more productive by standardizing business processes and providing one centralized location for project status updates and communication. It is designed for firms that offer CAS and are looking to grow their revenue, acquire new clients, and deliver world-class client service.

XCMworkflow has built-in tools and functionality that enable CAS departments to manage each client through configurable, firm-specific workflows, processes, procedures and terminology. Designed by business process experts, XCMworkflow for CAS aligns with your existing technology investments and integrates with many practice and document management systems for one comprehensive view of work.

Two features of XCMworkflow – Checklists and Points – are especially valuable for CAS departments. Checklists are flexible and dynamic, and enable project managers to delegate CAS responsibilities to colleagues within the software, automatically populating each employee’s personal checklists with their assigned tasks.

Users can enter Points to include important instructions or context, or to ask any questions that come up during a project. These insights follow a task from user to user and allow for multi-way, open communication as a project moves through the workflow.

XCM is customizable and flexible for firms of all sizes who want to scale their accounting practice, remain relevant to their clients, and service new and existing business across multiple geographies.
By using XCM Workflow for CAS you will gain:

**Visibility** to real-time status updates for projects and tasks across clients at any time, from anywhere

**Control** over how your CAS department manages different clients, ensuring consistent business processes across the board

**Flexibility** to update workflows, reassign tasks and projects, and reallocate resources with one click

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

XCM works with organizations to reduce turnaround times on client deliverables, such as Financial Statements, Management Reporting, Compilation Reports, and 1099s—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 XCM Workflow for CAS can increase productivity in your firm, contact us at 781.356.5152 or visit our website at xcmsolutions.com today.