



BRING VISIBILITY, CONTROL, ACCOUNTABILITY, AND FLEXIBILITY TO YOUR A&A PROCESS

XCMworkflow is a scalable, cloud-based system that enables tax, accounting, and finance professionals to be more productive, through process and technology. Workflow automation technology, paired with engagement software, supports a single point of data access to track and manage all aspects of the A&A process.

	When you experience:	You should know:	And consider this:
1 IMPROVED VISIBILITY INTO ENTIRE ENGAGEMENT	A non-linear, multi-point process with compressed deadlines and frequent late night status updates that put deadlines and client service at risk	XCM offers a 360° view of the A&A engagement process from start to finish — including the people, processes, timelines, and data necessary to complete your engagements	The number of firms offering fixed fees and value billing is increasing, which can lead to more compression of budgets ¹
2 IMPROVED CONTROL	Numerous hours spent in scheduling meetings and allocating the right resources to multiple engagements	XCM offers a powerful tool to help manage your resources through workload monitoring, detailed task assignment, status reports and a calendar-based scheduling module	20 – Number of years that Staffing issues have topped the list of accounting firm concerns ²
3 IMPROVED FLEXIBILITY AND ACCOUNTABILITY	11th-hour disclosure changes and adjustments, simultaneous reviews, changing schedules and multi-location engagements add to the chaos during the final finish-line sprint	XCM can help you quickly reassign work, communicate across team members and adapt to your ever-changing work environment without sacrificing client service	85% - The percentage of surveyed IPA firms who adopt flextime schedules for personnel ³

A true workflow platform provides four key workflow benefits that lead to increased productivity.

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 status for every assignment, task and deadline supports greater accountability.



XCM works horizontally across tax, accounting, and audit functions. With workflow at the heart of the engagement, audit professionals can enjoy a more positive work culture, improved realization rates, and relief from undue stress that comes from manual, unreliable processes. Take back control today and significantly increase productivity by placing the right workflow system at the core of your A&A engagement process.