

With great change comes great reward.

CPA.com and XCM
Firm Success Story



Brenda Olesuk, AAAPM
Director of Operations
and Development
Meyers Brothers Kalicka, P.C.

Growing firm adopts XCM® to streamline operations, increase efficiency and invigorate a collaborative work culture

Meyers Brothers Kalicka, P.C., saw an opportunity to increase efficiency and improve firm-wide operations. Processes were paper-heavy and inefficient, and cross-department communication was ineffective.

Brenda Olesuk, Director of Operations and Development, reported that the firm's biggest issue was streamlining workflow processes. Over the years, data had been stored in various locations. Lack of a single database hindered the firm's ability to streamline operations and caused bottlenecks between departments — and all of this hindered efficiency.

"We were driven to improve efficiency first ... we had gone through two efficiency initiatives, and our consultant strongly suggested we consider a workflow solution like XCM to implement our new Lean Six Sigma processes. At that time, we made a commitment to utilize technology better," explained Olesuk.

Having made a commitment to better utilize technology to improve efficiency, the firm adopted XCM.

"XCM allowed us to take data from disparate repositories — spreadsheets and different databases — to get it all aligned and into one repository. It took a lot of effort, but we did it," said Olesuk. *"From there, it's been one benefit after another."*

XCM also provided Olesuk and her team with the needed guidance required to make implementation a success.

"Not only did we receive one-on-one personal consulting from XCM to guide our implementation, but it was also strongly recommended that Sandy [the firm's XCM champion] attend XCM's user conference. She went, and it was like a lightbulb went off."

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Great change and the rewards that followed

Leading the implementation charge for the firm was Jennifer Roy, Senior Tax Manager, with the assistance of the firm's Tax Department Administrator Sandy Salvador. Their role was to ensure thorough, proper implementation of XCM across the firm. As the champions, they worked closely with MBK staff and XCM experts during each phase of implementation rollout to ensure long-term success and ongoing staff engagement.

Following the firm's XCM workflow implementation, Salvador identified process control and accountability among the top benefits. *"By standardizing the process, we now have far more control over the work moving through the office. This control leads us to having greater accountability among staff because we can see exactly who is doing what."*

Salvador also mentioned that with a streamlined process in place, flexibility has been an added benefit. *"Because it's easy to track work progress, we can quickly reassign tasks when needed. This level of flexibility is something we didn't have before XCM."*

With an end-to-end digital process in place, information now seamlessly flows between departments, which has helped remedy the firm's cross-departmental communication issues, and enabled staff to better serve firm clients.

Salvador explained, *"We are able to answer client questions a lot faster than we were before, and there has been less frustration among staff because the information is immediately available. There was also a noticeable feeling of comfort this past tax season because staff members were more knowledgeable and returns were going out the door quicker."*



Company Profile:

Full-service tax, accounting and audit firm supporting independent and family-owned businesses across industries

Location: Holyoke, MA

Staff: 55 full-time (7 partners)

"Having a centralized repository for tasks, checklists, sign-offs, notes and linked tasks among clients allowed everyone to spend less time collecting the information needed to deliver best products. We are so much more efficient now."

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Olesuk added that all this combined has helped create a calmer environment. *"It has really improved the work culture. With data flowing between departments, we noticed that all of our tax deadlines this year were far less stressful, and that makes for happier staff."*

From a management perspective, Olesuk reported a multitude of benefits realized since the adoption of XCM. Like Salvador, she recognized that gaining control of workflow was a lead benefit, while also highlighting visibility into processes as another core value. *"We can see what we need to see at any point in the process. As managers, having this level of insight is critical if we want to operate at a higher level of efficiency."*

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Olesuk also called out having a single database as another benefit — one that has fueled efficiency firm-wide. *"Having a centralized repository for tasks, checklists, sign-offs, notes and linked tasks among clients allowed everyone to spend less time collecting the information needed to deliver best products. We are so much more efficient now."*

Final words

Overall, firm leaders could not be happier with the move to XCM. Olesuk reiterated the value her firm has discovered: *"Because XCM is very robust, it streamlines workflow, heightens accountability across the firm and enables us to pull key metrics, so we always have a clear picture of what is going on. We have experienced immense value since implementation."*

When asked what advice she would offer other firms looking to implement a workflow solution like XCM, Olesuk added, *"You have to commit fully. You have to go deep and work closely with XCM to set up the program and utilize it to its full potential. You get out of the system what you put into it. You also have to put in the time to map out your implementation and know what your end in mind is ... and then work toward that."*

The firm's investment to elevate productivity using XCM has well positioned it to be future ready.



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