



# PRODUCTIVITY, SIMPLY ENABLED

**THE PREMIER PRODUCTIVITY ENABLEMENT AND WORKFLOW PLATFORM DEVELOPED BY BUSINESS PROCESS EXPERTS IN TAX, ACCOUNTING, AND FINANCE**

**Your time is precious ... COUNT ON XCM to help you accomplish more with the resources you have.** Powered by advanced cloud technology, XCM centralizes tax, accounting, finance, and audit processes within a single platform for end-to-end, streamlined workflow management. The holistic view of all work-in-progress helps leading firms balance workloads, proactively address bottlenecks before they become problems, and drive profitability.

Practitioners require a system to streamline complex, time-sensitive processes firm wide. With XCM, you have the peace of mind that your workflow solution:

- Standardizes and automates workflow across departments and offices, including audit, accounting, tax, consulting, and operations.
- Is consistently enhanced via a customer-guided development process.
- Is developed by a company that has been focused on delivering workflow solutions to the profession since 2002.
- Provides increased visibility, control, accountability, and flexibility.

## The Value of Automation

**When workflow is automated, productivity skyrockets.** XCM offers a comprehensive system to monitor activity across departments and with exceptional detail—fueling efficiency firm wide. Consider the value:

*A true workflow platform should offer your teams a way to coordinate, track and manage the work for every task and project, enabling you to improve productivity, accuracy, and efficiency across multiple departments and offices.*

## XCM Provides:

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



## Recover Billable Hours through Automation

Today's firms are focused on eliminating paper-heavy, manual-driven processes that consume countless non-billable hours. Consider the following example:

- By using XCM, a firm can save approximately 60-70 minutes of an employee's time each day.
- Therefore, if a firm employs 20 people
- And each employee works 100 days, at a fee of \$285-\$450/hour
- The firm can recover as much as \$570,000-\$900,000/quarter

*With XCM, firms are armed with a powerful, cloud-based workflow solution to accelerate productivity firm-wide.*

## How XCM Works

XCM is designed to efficiently handle complex workflow across departments. Our customer-guided development process has benefitted from the insights and input shared by tens of thousands of users. Consider a few key advantages:

- **Custom homepage**—employees access a custom homepage to view an organized list of assigned tasks for easy online management of workflow.
- **Detailed project management**—project tasks move efficiently through your office and are easily viewed in one central location.
- **Powerful search feature**—allows you to quickly search work in progress and specific project details. Real-time access supports immediate response time when clients call with questions and requests.
- **Integrated scheduling**—enables dynamic, real-time management of resources firm-wide.
- **Integrated client portal**—allows you to easily and securely collaborate with clients on projects.
- **Powerful cloud- and mobile-enabled platform**—supports on-the-go, 24/7 access and integration with other leading solutions to support today's competitive CPA firms.



Interested? Contact an XCM Workflow Consultant for more information **781.356.5152**.  
Or visit [xcmsolutions.com](http://xcmsolutions.com) to learn how XCM can work for you.