

CPA.com and XCM
Public Accounting Firms

CPA.com/XCM | 781.356.5152

Productivity,
Simply
Enabled™
with XCM®

Premier productivity enablement
and workflow platform developed
by business process experts in tax,
accounting and finance



XCM ... Redefining productivity enablement and workflow automation

XCM delivers the premier productivity enablement and workflow platform to tax, accounting and finance professionals. Our device and browser-agnostic cloud solutions offer real-time, anywhere, anytime access to work. 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:

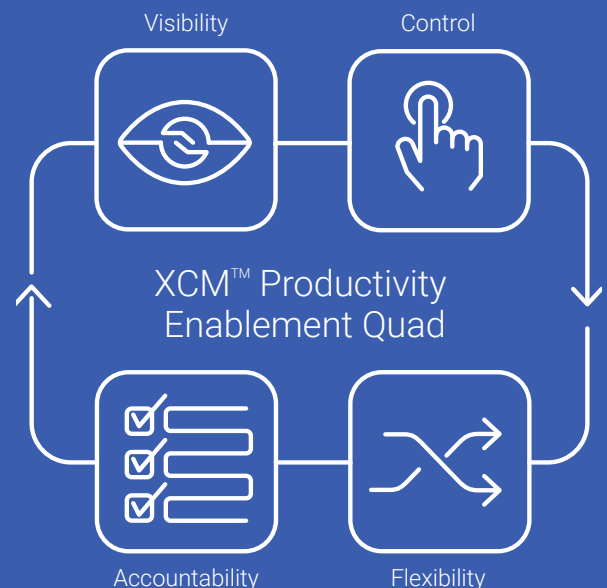
- Standardizes and automates workflow across departments and offices, including audit, accounting, tax, consulting and operations
- Is consistently enhanced via a customer-guided development process
- Has been fully vetted by the AICPA
- Is developed by a company that has been focused on delivering workflow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

The value of automation

XCM works with your existing technology systems to coordinate tasks between people and offices with the ultimate goal of improving productivity and efficiency firm wide.

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

- **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



A look behind the automation – how XCM works

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

- 1. Custom homepage** allows employees to view an organized list of assigned tasks for easy online management of workflow.
- 2. Detailed project management** translates to project tasks moving efficiently through your office and a high-level overview in one central location.
- 3. Powerful search feature** allows you to quickly search work in progress as well as specific project details. Real-time access supports immediate response time when clients call with questions and requests.
- 4. Integrated scheduling** enables dynamic, real-time management of resources firm wide.
- 5. Integrated client portal** allows you to easily and securely collaborate with clients on projects.
- 6. 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.



Automate your workflow and watch productivity soar.

Today's firms are focused on eliminating non-value added, manually driven processes that consume countless non-billable hours. With XCM, firms are armed with a powerful cloud-based workflow solution to accelerate productivity firm wide.

Consider the following example of increased efficiency and profitability:



Recover billable hours through automation.

By using XCM, a firm can save approximately 60–70 minutes of an employee's time each day.

Therefore, if a firm
employs



each employee
works 100 days



at a fee of

\$285 – \$450/hour

**The firm can recover
as much as**

\$570,000 – \$900,000 in billing time annually

What differentiates XCM ...

- Developed by CPAs and business process experts who understand the importance of a highly efficient workflow
- Has helped more than 34,000 users maximize their productivity
- Offers the power to increase productivity up to 30% in your firm
- Manages millions of processes per year, enabling professionals to complete more work, of higher quality, in less time
- Automates workflow firm wide, across departments and offices
- Vetted and endorsed by the AICPA as the recommended workflow solution for the profession

Contact us today.

XCM is the profession's premier workflow automation solution, designed for tax and accounting professionals. Learn more about how XCM can streamline your workflow firm wide for unprecedented time savings.

See XCM in action!

Request a demo:

Call 781.356.5152
or learn more at:
CPA.com/XCM

The power of smart business.

