Public Accounting Solutions

A roadmap to GETTING STARTED with workflow automation.

What's driving your desire to improve your workflow:

- Client acquisition?
- Increased realization?
- Staff efficiency and accountability?
- Improved client satisfaction?
- Employee satisfaction and/or retention?
- Professional staff development?

XCM is a cloud-based workflow solution that helps address these challenges, and more:

- WORKFLOW: Real-time 360° view of tasks, resources and projects, Ability to coordinate, schedule and allocate resources, Productivity enablement platform for increased capacity, Configurable implementation within 45 days, Due date management.
- PRACTICE MANAGEMENT: Control of time and billing, Quality and compliance management.
- DOCUMENT MANAGEMENT: Reporting, Ability to share information and/or documents.

Want to learn more about XCM? Contact us now.

INTRIGUED? Listen to our webinar recording.

Getting Started with Workflow Automation: Your Guide to Implementation