

WHO'S WHO

AMONG THOSE SERVING THE TAX & ACCOUNTING PROFESSION



XCM My View



XCM Routing Sheet

WORKFLOW

XCM Solutions, LLC

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No. of Employees: 25



XCM Search

COMPANY OVERVIEW:

Founded by CPAs, XCM Solutions, LLC is a leader in delivering workflow management solutions that empower accounting professionals at firms of all sizes and specialties, and within corporate finance departments, to improve efficiency, productivity and profitability by giving professionals better control over their processes for completing work.

In its tenth year, the XCM workflow management software has benefitted from the insights and input shared by tens of thousands of users. Today, XCM is the only mature, firm-wide, platform independent workflow management system that works with a firm's existing processes and technology investments, and has the flexibility to adapt to their changing needs in the future.

XCM provides real-time project detail at the individual user, department/office lead, and firm management levels to help firms implement standardized best practices, automate and digitize processes, and improve client service. Easily and securely accessible through the Web, the XCM software also serves as a collaboration tool to facilitate knowledge sharing across the firm and with remote workers for a truly client-centric service approach.

In 2010, XCM Solutions was selected as the **Preferred Provider of Firm-Wide Workflow Solutions for the AICPA Trusted Business AdvisorSM Program**, managed by CPA2Biz, a subsidiary of the American Institute of Certified Public Accountants (AICPA). CPA2Biz enables accounting firms nationwide with its Trusted Business AdvisorSM Solutions program — integrating best-of-breed cloud-based accounting solutions to transform how firms deliver the core services of tax, audit and client accounting services. More information available on www.cpa2biz.com/Workflow.

PRODUCTS:

The XCM family of Web-based workflow management solutions is designed specifically for the accounting profession with three offerings — its flagship **XCMTM**; **XCMessentialTM** a cost-effective, streamlined version that addresses the

unique needs of sole practitioners and small firms; and **XCMcorporateTM** for corporate tax and accounting departments, delivering:

- Personal Workload Management
- Process Control and Standardization
- Centralized Knowledge Management
- Enhanced Client Service
- Simplified Project Management
- Firm-Wide Resource Management
- Complete Workflow Automation

XCMportal further extends XCM's collaboration capabilities to empower firms to seamlessly and securely share information with clients and other third parties easily throughout the workflow process. XCM has become an indispensable tool to accounting professionals as they adapt processes to digital technologies to improve productivity and enhance client service.

MARKETS SERVED:

XCM Solutions focuses on developing solutions for the accounting profession, including practices of all sizes and specialties, as well as corporate tax and finance departments.

- XCMTM - 10 + users**
- XCMessentialTM - 1- 10 users**
- XCMcorporateTM - tax, accounting and internal audit departments**
- XCMportal** - secure client portal integrated with XCM (optional module)
- XCMtoolbar** - helps clients work more effectively with PDFs

CUSTOMER SUPPORT:

XCM Solutions offers both web-based and on-site training, as well as regular best-practice and role-based trainings for new staff members or to serve as a refresher on key functionality. The company also provides live customer support with multiple service levels, online video tutorials for just-in-time feature review within the application, and hosts an annual user conference. For those firms that need individual workflow analysis, XCM Consulting provides a detailed review and analysis of how you can improve the workflow within your firm.

AICPA Trusted Business AdvisorSM Solutions

What will you do with all the time XCM saves you?



Scan QR code to check out **WS+B's State of the Firm Flash Mob Video!**



Firm-Wide Workflow Automation

Whether your goal is to grow your practice, improve your profit margins, or achieve a better quality of life for your staff, XCM can help. It's the only web-based application that automates and standardizes processes for completing work across the firm, providing instant access to real-time task and work management information. As a result, you save countless unbillable hours spent searching through paperwork, updating log sheets, and managing work through email. Firms using XCM have reported significant time savings at all levels across the firm. So, the only question you need to ask yourself is how will you spend the time you save?



"WS+B focuses on its high employee satisfaction with the time it saves using XCM, showcasing why this 440+ person firm is one of the Best Firms to Work For!"

XCM Solutions

See how much time you can save. Visit cpa2biz.com/XCM or call 781.356.5152

