

**WORKFLOW
MANAGEMENT**

WHO'S WHO

AMONG THOSE SERVING THE TAX & ACCOUNTING PROFESSION



Learn more about
XCM Solutions, LLC at
www.cpdata.com/whoswho/XCM

XCM Solutions
www.xcmsolutions.com

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 the processes for completing work.

Though the market for workflow solutions is still in its infancy, the XCM workflow management software is now in its sixth generation, and its development has benefitted from the insights and input shared by thousands of users over the past five years. XCM's customer-guided development process has proved to be a strong asset to the company's leadership team, which has its roots as accounting practitioners, to deliver a product that continuously meets the evolving needs of today's firm.

XCM is a comprehensive work management tool that provides real-time project detail at the individual user, department/office lead, and firm management levels to help firms realize greater efficiencies and improve productivity as they continue to implement standardized best practices, automate and digitize operations, and deliver a breadth of services to their clients.

The XCM workflow management software has become an important tool for firms to effectively drive the paperless office, providing instant access to important client documents stored digitally as work moves intelligently through the office. 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 to enable a truly client-centric service approach.



PRODUCTS

The XCM family of Web-based workflow management solutions is designed specifically for the accounting profession with three offerings — its flagship **XCM™**, **XCMessential™** to address the unique needs of sole practitioners and small firms just beginning to work digitally, and **XCM Corporate™** for Corporate 2000 accounting departments.

XCM is the only workflow management software that empowers firms to efficiently and effectively manage the flow of work, according to the firm's established processes, throughout the firm and across remote offices. XCM 6.0 raises the bar for workflow management, elevating it from a departmental or functional solution (i.e. automating document flow) to a complete, firm-wide solution delivering work management capabilities at the individual, departmental, office, and firm levels — providing a full picture of all work within the firm.

Each new version of XCM has offered firms layers of new intelligent automation while retaining its intuitive, easy-to-use interface. XCM 6.0 offers many new and expanded capabilities, among them:

- Integration with Windows® Explorer, Sharepoint and other leading document management solutions gives firms real-time access to important client documents as the work moves intelligently through the office or across multiple offices, enabling greater efficiency and productivity.
- Expanded workflows offer firms a turnkey solution customized to fit all types of work completed within the firm, including tax, A&A, bookkeeping, proposals, and operational functions such as large-scale IT initiatives.
- Intelligent automation easily manages repeating activities through its recurring tasks capability, ensuring no deadlines are missed and established processes are followed.
- Firm Specific Jurisdictions enable custom due dates and extensions with global application across the firm to yield significant time savings.
- Accounting & Audit compliance and reporting

capabilities track all information required for engagements, including an extensive sign-off page, ability to track 45/60 day requirements, partner rotation, reporting and scheduling dates, etc.

XCM has become an indispensable tool to accounting professionals as they look to 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 finance departments.

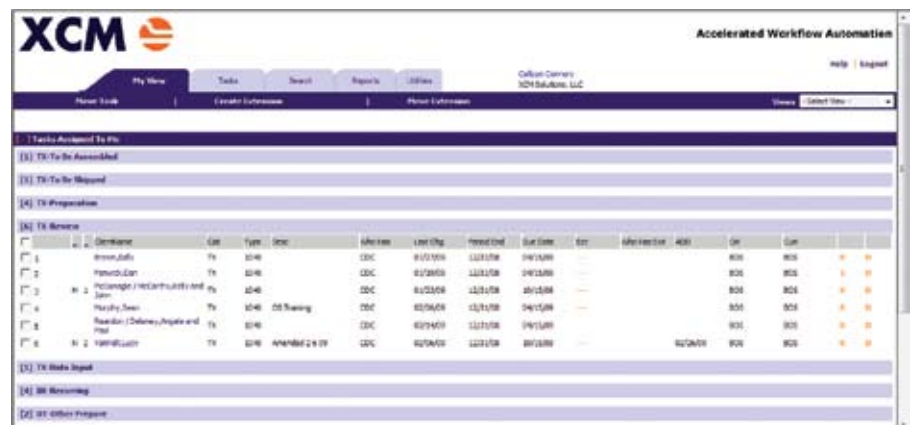
XCM™ — 10 + users

XCMessential™ — 1- 10 users

XCM Corporate™ — tax, accounting and internal audit departments

CUSTOMER SUPPORT

XCM Solutions offers both web-based and on-site training, as well as live customer support and an annual user conference. For those firms that need individual workflow analysis, XCM Consulting provides a detail review and analysis of how you can improve the workflow within your firm.



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NUMBER OF EMPLOYEES: 25

YEAR FOUNDED: 2004

**What advice would you
give a client that's losing
30% productivity due to
inefficient processes?**

**What if that business
were yours?**

**Learn how a paperless workflow can boost your bottom line. Visit www.XCMSolutions.com.
Can you afford not to take your own advice?**

XCM 
Workflow Management

XCM *essential* 
for small firms

XCM  **Corporate**
for accounting departments

For more information, click "e-Inquiry" at www.CPATechAdvisor.com and enter e-Inquiry # 26