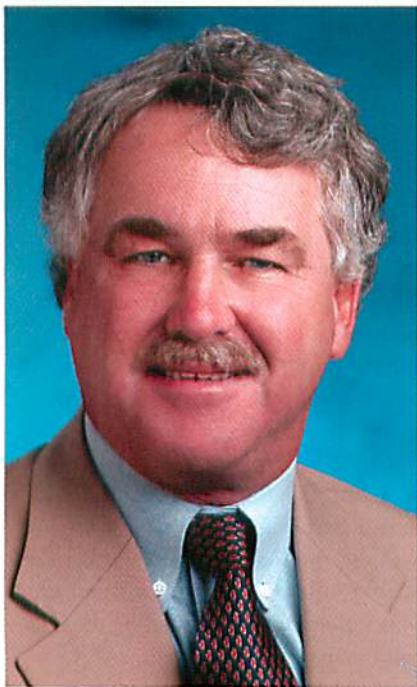


## Delivering New Functionality

Adoption of paperless technologies has increased significantly over the past few years as firms look to create greater efficiencies to ease the challenges created by the staffing shortage. As more firms adopt scanning technologies and document management systems, the need for workflow automation becomes increasingly apparent.

Just as we have seen a great deal more interest as a profession in workflow, XCM Solutions experienced a great deal more traction this past tax season with firms of all sizes implementing the XCM workflow automa-



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tion software. This summer we plan to release the sixth major version of our award-winning software, with new capabilities designed to further promote process standardization for all work performed within the accounting firm.

XCM was developed to address how

firms move work through the office, not as a means to route specific types of documents. Though automating document storage is certainly a useful capability, the problem with a document-centric workflow system becomes apparent as soon as a firm's process for completing a task revolves around more than one document. However, providing access to all of the task-related documents as the work is intelligently routed through the office does make sense.

This past tax season our clients were able to take advantage of our integrated version of XCM with ProSystem/xf Document. Having the associated documents linked to the digital routing sheet is a key piece of workflow automation.

### AS MORE FIRMS ADOPT SCANNING TECHNOLOGIES AND DOCUMENT MANAGEMENT SYSTEMS, THE NEED FOR WORKFLOW AUTOMATION BECOMES INCREASINGLY APPARENT

Our clients using the integrated version literally "lived in" the XCM software during tax season and reported that their tax season ran more efficiently and productively. Because of this resounding response to document/routing sheet integration, we are extending the same capabilities to Windows Explorer for the coming tax season.

We have also just completed development of several other features, which will be available in the new version due out later this summer, including an expanded due date monitoring module that is customizable by jurisdiction for all city, state, and other project-specific deadlines. Another new capability enables users to schedule the automatic creation of recurring tasks, based on time period, type of information to roll-over, and who the task is assigned to.

This automatic task creation feature will intelligently start to schedule work for your staff.

Another significant development initiative is the creation of expanded pre-built workflows to give firms greater flexibility in customizing XCM to meet their specific needs, while minimizing implementation time. This release also provides significant enhancements to XCM for use as a compliance and reporting tool for A&A and bookkeeping departments. This enhancement will not only provide workflows that more appropriately describe the work it is associated with, but will also allow you to manage the firm's attest practice as well as

allow you to place *customized* checklists associated with the tasks.

Tax season is crunch time for most firms and having to learn how to use new software capabilities, regardless of how intuitive they are, just adds unnecessary anxiety. Releasing a major new version prior to the fall deadlines gives all users, from administrative staff through partners, the opportunity to use new features before the busy season. When our clients have a successful season, we have a successful season and we're looking forward to a 2009 tax season that goes as smoothly as the last.

Visit [www.xcmsolutions.com](http://www.xcmsolutions.com) to view a demonstration and use the Productivity Calculator to learn how XCM workflow software can save your firm time, money, and staff this year. SR