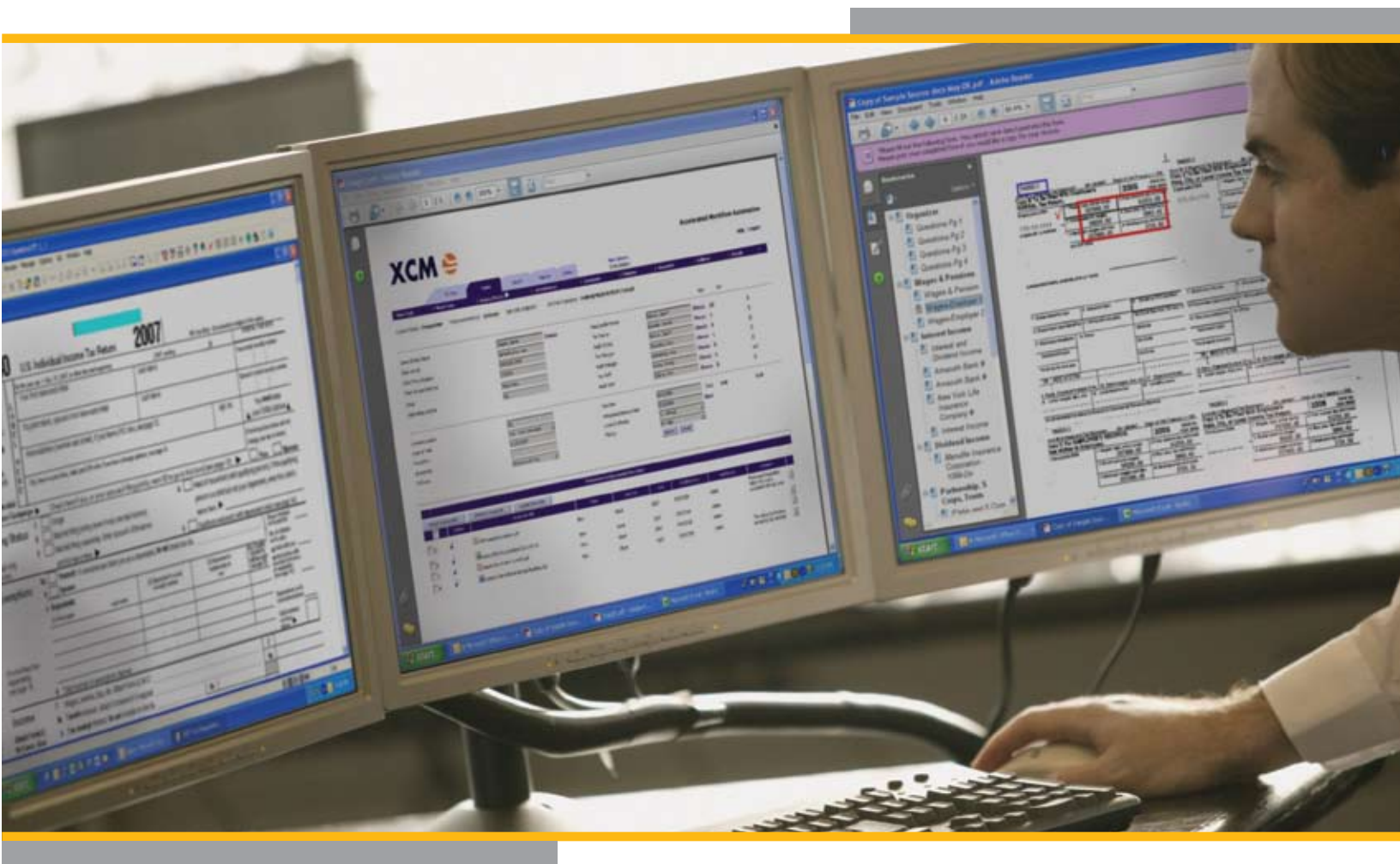


XCM

The workflow engine that drives your entire office.





Intuitive Workflow Automation.

Increase your firm's productivity by up to 30% with XCM™ workflow automation.

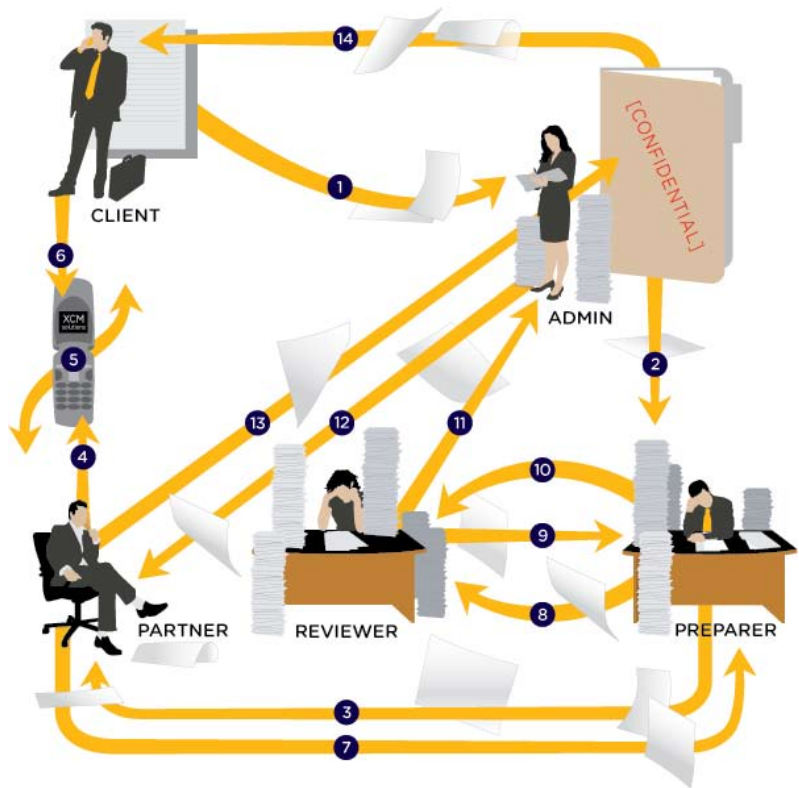
Designed by CPAs for the accounting profession, XCM is an intuitive, web-based application that automates and standardizes processes for completing work across the firm and in all departments, including audit, tax, consulting, and human resources, in a single workflow solution.

XCM replaces the cumbersome and inefficient manual process of moving paper files through the office and centralizes important task information typically housed in disparate applications, paper files, and sticky notes - eliminating countless non-billable hours chasing returns or looking for files. Firms of all sizes use XCM as a strategic management tool to increase efficiency and improve customer service.

With XCM, you'll gain immediate productivity increases that can be turned into more billable hours and higher profits for your firm.

XCM solves the workflow problem.

Whether your firm is paper-driven or paperless, moving work through your office using paper files or routing sheets inhibits efficient workflow. XCM is the only solution that automates your workflow to solve this problem — making your firm more efficient, productive, and profitable.



The average 20-person accounting firm wastes 1,500 hours every busy season costing the firm \$225,000 on average in lost productivity due to the inefficiencies of a paper-based workflow process.

Personal Workload Management.

You no longer have to manage your workload through disorganized piles of files in your office, handwritten to-do lists, or emails in your inbox. XCM's My View screen serves as a dynamic, real-time to do list that allows each user to view and manage his or her workload from anywhere.

XCM automates the movement of work through the office, displaying new tasks on the user's home page as work is assigned to them. Automatic email alerts inform staff members of new work awaiting their attention in XCM.

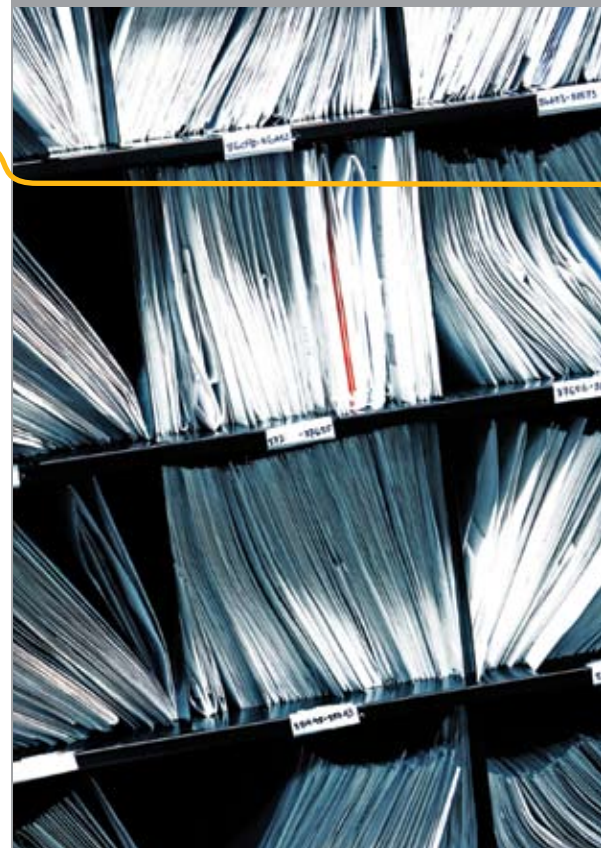
Process Control and Standardization.

XCM enables your firm to gain efficiency and productivity increases by standardizing your workflow process and automating best practices for completing work. XCM manages all of your firm's workflows and enables you to easily maintain control over hundreds of client tasks at once.

XCM's digital routing sheet contains all the information related to a specific task, as work moves through the office. Its flexible design enables firms to mirror established practices. And, powerful reporting tools help firms monitor and streamline those practices for greater productivity gains.

"To really maximize the value of our XCM investment, we knew we needed to assess and adapt our workflows for the digital environment, so we engaged XCM's consulting services prior to implementation. RAFFA employs more than 160 people and has a dedicated operations team with many talented business re-engineers. But, having someone outside the firm who's both knowledgeable about the various aspects of firm operations and the XCM software work with us was worth its weight in gold."

– Charles Spring,
Chief Technology Officer,
RAFFA



Centralized Knowledge Management and Storage.

Gathering bits of information from email, paper files, software applications and electronic documents wastes time and creates redundancy. XCM stores and organizes all the information related to a particular client task, which is instantly accessible with the click of a button.

XCM provides easy access to questions, issues and review points, assembly details, shipping and routing information, jurisdictional due date and extension information, and any pertinent task-specific knowledge. Integration options provide easy access to relevant documents in your document management system or Windows Explorer filing system through XCM.

Enhanced Client Service.

XCM gives partners and managers real-time control over all your clients' work, minimizing the stress and anxiety associated with managing hundreds of clients during busy periods. And, XCM's tracking capabilities give you instant access to all information associated with the status of that work to respond immediately when a client calls.

Powerful search capabilities allow you to easily pull up a complete view of all your clients' work or details of a specific client project, including any open questions. XCM also enables you to instantly create a pro-forma email to a client that automatically populates the client email address and open questions.

"At Wiss, we are constantly striving to examine our workflow processes as a means of meeting client expectations for top level service. XCM is a superior system which provides our partners, staff and support personnel with a comprehensive platform to track workflow, while enhancing communication within the firm and to our clients."

– Jeff Campo, CPA,
Managing Partner,
Wiss & Company, LLP



Simplified Project Management.

XCM's process control and automation make project management easier. It also features a full due date monitoring module, scheduling and budgeting capabilities, as well as complete audit and tracking capabilities.

At any time, a manager can easily see the status of a project, who worked on it and for how long, how it moved through the office, where it will go next, and reassign it with just a click of a button. XCM also serves as a final record of the outcome of the project, including how it was delivered to the client.

Firm-Wide Resource Management.

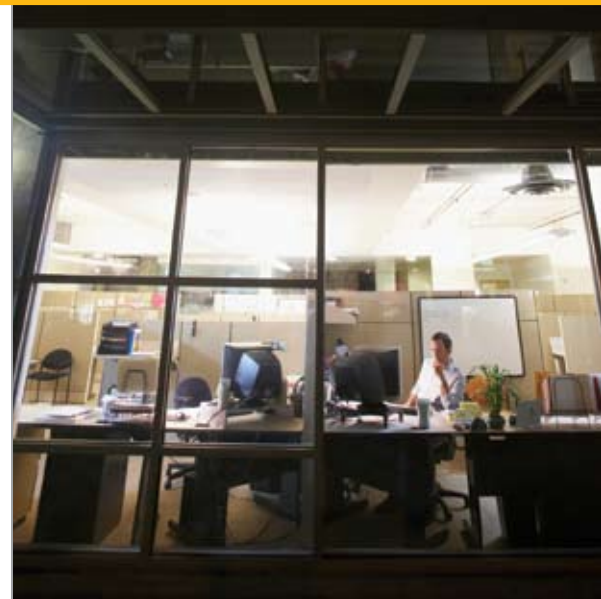
Being able to quickly access information to help run your business is crucial to any firm, especially during the busy season. XCM's easy-to-use search and reporting capabilities provide an instant view into all work in progress firm-wide to empower management to quickly take appropriate action.

XCM's Workload Reports allow partners and managers to easily view staff workload for making new assignments or moving work to another available resource to better balance an individual's workload. XCM is also enabled for multi-office use to facilitate easy resource sharing across offices.

"Due to recent growth, we're now spread over four offices in two cities. Such expansion would have presented a logistical challenge with our previous paper-driven work process, forcing us to waste precious tax season time moving paper files among our offices. Using XCM in a paperless environment has given us control over the entire process because at each stage we can see who has responsibility for work — no matter where that work resides"

— Fredric M. Silverman, CPA, MBA,

Principal,
Janover Rubinroit, LLC





Complete Workflow Automation.

As a standalone software solution, XCM works well with various practice management, document management, due date tracking, budgeting, and time and billing applications, while it encompasses aspects of each of these technologies critical to delivering a comprehensive view of all work within the firm and its status within the defined processes.

XCM centralizes important task-related information and work management controls into a single, searchable firm-wide dashboard. This knowledge is necessary for resource management, client management and workload management at the individual, partner and firm administrator levels.

It is the only web-based platform-independent workflow automation solution that works either standalone or can be used in conjunction with the leading document management systems and Windows Explorer, making it singularly capable of effectively managing all types of work performed in a firm.

“Our IT department is focused on implementing the best solutions for our specific needs in each technology area. So, it was important that we chose a workflow automation system that works well with our other systems, but that would operate independently to have broad application across the firm. For us, XCM is a firm-wide solution, not a departmental system.”

– Tammy Bues, CPA,
Tax Manager,
Schenck Business Solutions



Proactive Service and Support.

XCM Solutions delivers hands-on service and support to guide firms in maximizing the efficiency and productivity increases gained with XCM. We understand your time is valuable. That's why implementation and training is fast and thorough.

We pride ourselves on responsive, professional technical support and offer additional opportunities, such as our Annual User Conference, to help you make the most of your investment.

Workflow Best Practices.

Standardizing processes firm-wide can be a daunting task. XCM Consulting works one-on-one with clients to build best practices. Our approach starts with a complete analysis of current business processes and a design of "as is" workflow models. Our consultants then work with firm leaders to identify improvement opportunities, develop standardized best practices, and prepare new workflow models.

The goal is to help you increase profitability, productivity and enhance client service.

“XCM was designed by CPAs to solve a real challenge we faced in our firm. We learned by our own experience that we could realize radical productivity gains by standardizing and automating how we work. In XCM, we have developed a powerful tool that draws on our knowledge and the collective knowledge of our clients to empower all of our clients to attain the same success.”

– Mark Albrecht, CPA, MST,
Chief Executive Officer,
XCM Solutions, LLC

XCM Solutions, LLC

Founded by CPAs, XCM Solutions, LLC provides accounting firms with web-based workflow automation solutions that increase efficiency, productivity and profitability. The company’s management team has drawn on its extensive experience in public accounting and clear understanding of the paper-driven workflow issues facing the profession to develop technology that addresses those challenges.

XCM’s customer-guided development process has helped the company continuously raise the bar for business process automation solutions for the accounting profession. The award-winning XCM™ workflow and information automation software has become a key piece of the technology equation for firms re-engineering paper-based processes as they move toward a paperless environment.

Learn how XCM can save your firm time, money and peace-of-mind. **Contact us today.**

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