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efforts to streamline its tax processes and scheduling.

Taija Sparkman • Jul. 25, 2013

Berdon, LLP recently announced changes to its workflow management systems in efforts to streamline its tax processes and scheduling. The CPA and advisory firm has chosen **XCM Solutions'** workflow software to automate tax processes and workflow across the firm.

“We started evaluating technologies to help us create a more efficient, digital tax process – essentially, to reduce our reliance on paper,” said Dennis McGuckian, Manager of Tax Administration, Berdon, LLP. “After learning more about XCM, we realized that what we actually needed was a workflow system. We already had a document management system – we just needed a practical solution that would empower us to work digitally.”

Berdon, which has approximately 400 professionals and staff members in offices in New York City and Jericho, Long Island, needed a solution that would standardize the firm's workflow across the entire practice. The firm has already implemented XCM software to streamline its digital tax workflow and automated resource planning. It also has plans to further roll out XCM to other areas of the firm.

“Not only did XCM appear to be more intuitive and easy-to-use, but it was also a good fit with our existing technologies,” said Harvey Susnick, Partner, Berdon, LLP. “As a firm, we use our collective expertise to provide our clients with the best solution for a specific need. That same principle has guided our technology adoption – selecting the best product for a particular function.”

“We're honored to be working with such a prestigious firm,” said Bob Locke, Vice President of Sales, XCM Solutions, LLC. “We applaud their approach in taking

advantage of the summer months to enhance their tax processes. We often tell firms

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