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Isaac M. O'Bannon • Jan. 01, 2014



Improving workflow by streamlining engagements and following best practices is a continuing effort for successful accounting firms, but implementing workflow

management solutions has often been a challenge for smaller firms. This is because

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“We have helped firms of all sizes for more than a decade, but smaller firms from one to 20 often face a greater challenge truly getting off the ground with the system,” said Erika Schonberg, Marketing & Alliances Director for XCM. “The new system can help a firm get XCM implemented the way that best works for their workflow and industry best practices, and also provides a consultant who can ensure the needs of the firm are met.”

Since the consulting and implementation services are managed by XCM, it allows staff to continue working on their engagements during the process. Shonberg said XCM's goal for implementation, including consulting and training, is to get a firm up and running on the system in less than two weeks. Live and on-demand training options are available for each user role, and only takes about one hour for a user to master the basics.

“I've heard it said that small firms don't really need a full workflow system – that an all-in-one system with tracking capabilities is 'good enough',” said Jeff Seargeant, CPA, Partner at Kaufman & Seargeant, CPA's. “I couldn't disagree more. We had used a tracking system in the past, then we adopted XCM about four years ago and now we use it to manage all of our tax and client accounting service processes. XCM is an important tool for us, as we embrace new practice models and focus on delivering higher value service to our clients.”

The XCM Consulting team works with the firm to configure the XCM site using best practices for all project types, customize the site according to firm specific needs, and provide live and on-demand training options for convenient, role-specific training.

“The XCM software has always been highly scalable – meeting the needs of sole practitioners right up to Top 10 firms,” said Mark McAndrew, Director of Consulting Services, XCM Solutions. “However, smaller firms tend to have more demands on their internal resources that can inhibit their ability to effectively implement and

utilize new products quickly. We've developed a program based on the best practices

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and calendar-based scheduling, tax and accounting service outsourcing, and integration services.

XCM leverages interactions with firms of all sizes to develop industry best practices, which is extended to clients as part of the ongoing service provided by XCM Consultants. Site assessment services are provided to clients as an annual value added service at no charge, and best practice offerings are available to clients on request and cover a wide range of workflow topics.

Designed by CPAs for the accounting profession, XCM is an intuitive, cloud-based application that automates and standardizes processes for completing work throughout the firm and in all departments, including audit, tax, consulting and human resources. XCM is the only standalone work-management solution for the entire firm, and was selected by the AICPA as its preferred provider for firm-wide workflow solutions, joining CPA2Biz's Trusted Business Advisor Solutions platform.

In 2010, CPA2Biz, a subsidiary of the American Institute of Certified Public Accountants (AICPA), and XCM Solutions formed a strategic alliance to bring the XCM workflow management software into CPA2Biz's Trusted Business Advisor Solutions cloud computing platform.

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