Company Overview

Founded by CPAs, XCM Solutions, LLC is the 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 their processes for completing work.

Since 2004, the XCM workflow management software has benefitted from the insights and input shared by tens of thousands of users. Today, XCM is the only firm-wide, platform independent workflow management system that works with a firm's existing processes and technology investments, and has the flexibility to adapt to their changing needs in the future.

XCM provides real-time project detail at the individual user, department/office lead, and firm management levels to help firms implement standardized best practices, automate and digitize processes, and improve client service. 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 for a truly client-centric service approach.

In 2010, XCM Solutions was selected as the **Preferred Provider of Firm-Wide**

Products

The XCM family of Web-based workflow management solutions is designed specifically for the accounting profession with three offerings – its flagship **XCM™**; **XCM*essential*™** a cost-effective, streamlined version that addresses the unique needs of sole practitioners and small firms; and **XCMcorporate*™*** for corporate tax and accounting departments, delivering:

- Personal Workload Management
- Process Control and Standardization
- Centralized Knowledge Management
- Enhanced Client Service
- Simplified Project Management
- Firm-Wide Resource Management
- Complete Workflow Automation

XCM*portal* further extends XCM's collaboration capabilities to empower firms to seamlessly and securely share information with clients and other third parties easily throughout the workflow process. XCM has become an indispensible tool to accounting professionals as they adapt processes to digital technologies to improve productivity and enhance client service.

Markets Served

XCM Solutions focuses on developing solutions for the accounting profession,

Customer Support

XCM Solutions offers both web-based and on-site training, as well as regular best-practice and role-based trainings for new staff members or to serve as a refresher on key functionality. The company also provides live customer support with multiple service levels, online video tutorials for just-in-time feature review within the application, and hosts an annual user conference. For those firms that need individual workflow analysis, XCM Consulting provides a detailed review and analysis of how you can improve the workflow within your firm.

XCM Solutions, LLC

639 Granite Street, Braintree, MA 02184

781-356-5152

info@xcmsolutions.com

www.xcmsolutions.com

Employees: 25

Year Founded: 2004

Technology

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us