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## Company Overview

XCM Solutions is a leader in delivering workflow management solutions that empower accounting professionals at firms of all sizes and specialties to improve efficiency, productivity and profitability by giving professionals better control over their processes for completing work. XCM is also a key component of CPA2Biz's Trusted Business Advisor Solutions cloud computing platform.

Now in its seventh generation, 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.

## Products

The XCM family of Web-based workflow management solutions is designed specifically for the accounting profession with three offerings — its flagship **XCM™**; **XCMessential™**, 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

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XCM has become an indispensable 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, including practices of all sizes and specialties, as well as corporate finance departments.

**XCM™ – 10 + users**

**XCMessential™ – 1- 10 users**

**XCMcorporate™ – tax, accounting and internal audit departments**

## Customer Support

XCM Solutions offers both web-based and on-site training, as well as live customer support and an annual user conference. For those firms that need individual workflow analysis, XCM Consulting provides a detail review and analysis of how you can improve the workflow within your firm.

XCM Solutions, LLC

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