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

Apr. 17, 2008

From the April/May 2008 Review of Tax Compliance Suites

XCM's Accelerated Workflow Automation system is a remotely hosted management program designed to help reduce the inefficiencies of manual processes within accounting and tax practices. By providing real-time access and control over workflow processes to firm management, the system helps keep preparation and review processes flowing smoothly, while also ensuring individual accountability, enhancing client service and freeing up time that might otherwise be lost. This automation and acceleration of information, in turn, enables staff to focus on more productive and profitable tasking.

Just as partners, managers, preparation staff and administrators each have varying roles in the operations of a tax and accounting firm, XCM recognizes these roles and provides features specific to their supervision. For managing partners, this includes access to executive dashboards that display vital business information, with drilldown functionality and tools to enhance the measurement of staff and process performance. This provides top-level stakeholders with the ability to hold staff more accountable for their area of responsibility.

Instant metrics and custom reporting are available in seconds and with just a few clicks, keeping partners fully appraised of practice activities and workflow processes. For junior partners who oversee specific firm specialty areas such as tax and audit services, XCM helps improve day-to-day organizational control and enhances customer service. By providing these practice area leaders with on-demand access to project specifics, including audit trails and historic routing, customers can be quickly informed of the status of their work, while management can locate and resolve any bottlenecks in the workflow process.

Through increased organization and tracking, preparation staff members are

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

on their specific role and tasking, providing reminders, due-date monitoring, a detailed "to do" list and assembly instructions with the steps required to complete tasks appropriately and efficiently. XCM also provides customized, rights-based reporting and can be set to automatically notify staff of new work assigned to them, while client-deliverable e-mails are generated with reviewer comments or questions. XCM Accelerated Workflow Automation can be a central component of a professional practice's paperless strategy, providing automated management of all work processes, while also offering the benefits of a hosted, remotely accessible system that utilizes the highest levels of security. The company's hosting facilities, located in Boston, are also SAS 70 audited.

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved