

Increases Productivity By Automating Workflow

With the recent introduction of XCM software, tax accountants will once again be able to see their families during tax season!

XCM is a first-to-market, patent pending workflow application that increases efficiency, productivity and profitability within accounting firms. It is a Web-based application that CPA firms can easily implement regardless of the core software they use. XCM reduces the time it takes to process tax returns, tax notices, financial statements and bookkeeping projects by automating your workflow. By increasing productivity, it enables firms to assume a greater workload with existing staff, increasing profitability.

XCM Solutions CEO Mark Albrecht, a CPA for almost 30 years, developed XCM based on a very real need he identified in his own accounting firm, Kirkland, Albrecht & Fredrickson, LLP (KAF). Every year, his firm and countless other accounting firms process hundreds to thousands of tax returns and financial statements in a condensed timeframe using the same inefficient paper/file-based workflow process they have been using since the inception of the industry. Tax departments are challenged to produce more work using an inefficient process with limited controls. Every year, they struggle with the same process, which hinders productivity, and creates unnecessary anxiety and stress.

Albrecht and his partners brainstormed ways to facilitate the tax-return preparation process and conceived a new method of electronically controlling workflow throughout the office, creating XCM.

More than an automated tracking and monitoring system for your administrative staff, XCM is an intuitive Web application providing task-oriented solutions to expedite the workflow management process within a CPA firm, all in real time. Professional and administrative staffs have instant access to the location and status of every project, task or return, and are able to access the files both in the office and remotely.

The key to the XCM model is assigning a personalized home page for each employee within the organization. Work assigned to an individual is delivered to a personal home page, and from there it routes through the entire preparation process. A personalized “to do” list appears on each employee’s home page, automatically organizing his or her day. Each additional piece of information that enters the system is tracked and accessible, anytime, anywhere.

Preparing a tax return is a multi-step process, from login of the return to preparing questions and review points, to shipping and assembling. By automating the workflow process, XCM makes each of these steps transparent to everyone in the organization at the click of a mouse. XCM provides industry professionals with quick and easy access to information. Gone are the days of rifling through mountains of disorganized files, or roaming from office to office in search of the status of a return. All the information needed to serve clients is instantly accessible, saving hours of wasted time and reducing tax-season frustration. The XCM workflow automation solution results in higher productivity and ultimately increased profitability.

“XCM has greatly improved the service we provide to our clients,” according to Robert Goodman, CPA, of Robert Goodman PC. “We no longer feel the pain in our stomachs when clients call inquiring about the status of their returns. We have access to real-time information, at our fingertips, to better serve our clients. XCM has also eliminated the risk of a client slipping through the cracks and has given us a management tool that identifies bottlenecks before they become problems. The status of a return is only a keystroke away, eliminating the need to frantically try to locate a client file.”

To find out more information on how XCM can streamline your office visit the XCM Solutions Website at www.xcmsolutions.com or call 781-356-5152.