

SPEND LESS TIME ON ENGAGEMENT REPORT AGGREGATION

XCMworkflow is a scalable, cloud-based system that helps tax, accounting, and finance professionals be more productive, through process and technology. But did you know that using XCMworkflow can also simplify your engagement reporting?

Using data from your firm's XCMworkflow, XCM offers an Engagement Summary Report that contains the data you need to quickly analyze engagement status and results. Fully customizable within any of these categories, XCM's Engagement Summary Report allows you to adjust its report variations to hone in on the information you need.

TURN YOUR ENGAGEMENT DATA INTO INFORMATION YOU NEED

XCM's Engagement Summary Report can help you generate six key reports with just a few clicks:

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|  PEER REVIEW REPORT |  ENGAGEMENT STATUS REPORT |  TECHNICAL REVIEW REPORT |
|  BINDER LOCKDOWN REPORT |  ENGAGEMENT ECONOMICS REPORT |  PARTNER ROTATION REPORT |

XCM Is Productivity, Simply Enabled®

By using XCMworkflow, you will gain:

360° Visibility: manage deliverables and project knowledge in a central repository to enable greater transparency and expanded visibility

Greater Accountability: automating workflow helps ensure standardized best practices are followed, and status details and historic information is captured

Complete Flexibility: enact continuous process improvements while increasing efficiency, and empower teams to work securely from anywhere, at any time

Increased Control: reduce compliance, risk, and audit concerns by building key controls and sign-offs into each process



XCM offers a complete productivity enablement and workflow platform that empowers you to manage all types of work, within all departments, across multiple offices. Our solutions include XCMworkflow, XCMscheduler, XCMportal, XCMmobile, and Xpitax™ Outsourcing—all designed by tax and accounting process experts to help you work more efficiently and effectively in a digital environment.

XCM is an open platform system that works horizontally across tax, accounting, finance, audit, and operations applications. We manage millions of processes per year, enabling professionals to complete more work, in less time, with greater quality. Our device and browser-agnostic cloud solutions offer real-time anywhere, anytime access to work. Though we integrate with several popular tax and accounting packages, the real payback is through your greatest asset—your people.

XCM is the only productivity enablement and workflow platform endorsed by the AICPA, and complies with the controls and applicable criteria of the AICPA Trust Service Principles.