

# HOW TO ACHIEVE A SMARTER, MORE EFFICIENT CAS-TO-TAX PROJECT PIPELINE

When properly executed, Client Accounting Services (CAS) can lay the groundwork for smooth, seamless tax preparation. However, if CAS and Tax teams are not sufficiently aligned, efficiency and profitability suffer — and so does the client experience. All too often firms that offer clients both CAS and tax services encounter several obstacles as they try to provide a high level of coordinated client service.

## The Challenges



**Lack of visibility to task status**



**Limited access to historical documentation**



**Incomplete trial balances**



**Bottlenecks between departments**

The good news is that the right productivity enablement and workflow technology can virtually erase the divide between CAS and Tax departments to offer sensible, flexible and intuitive connection points that facilitate greater coordination and collaboration. The result: smoother handoffs, 1-click visibility into status and task-related information, higher client and employee satisfaction — and the efficiency and performance gains that help firms achieve greater profitability.

## The Solution



**Use checklists to enforce processes**



**Assign tasks to individuals from a single hub**



**Associate Client-specific project points with individual clients – permanently**



**Easily link tasks between departments**



**Instantly access historical task information**



**Reduce project related email volume**



**Create groups combining similar or related clients**

XCMworkflow<sup>®</sup> is the leading productivity enablement and workflow solution to enable tight alignment between Tax and CAS departments. For tax professionals who need to manage returns with multiple team members, and who require certainty that work will be completed on time, accurately and within budget, XCMworkflow offers unparalleled capabilities in a flexible and intuitive package.

To learn how XCM's workflow automation software can help your firm move towards standardized and efficient processes, contact us at **781.356.5152** or visit **[xcmsolutions.com](https://xcmsolutions.com)** today.