



# XCM

XCM is an open platform system that provides productivity enablement and workflow management across tax, accounting, finance, audit, and operations applications. Powered by advanced cloud technology, XCM centralizes tax, accounting, finance, and audit processes within a single platform for end-to-end, streamlined workflow management.

**24%**

Pages Per Session Increase

**53%**

Avg. Session Duration Increase

**12%**

Bounce Rate Decrease

## Background

XCM came to Wakefly for help with a website consolidation project that would require merging the content of three existing sites into a single site, with a new brand look and feel. The previous sites were targeted to a few different personas so it was imperative that the new site was structured in a

way that would provide concise messaging tailored to the role and function of their customers. User engagement had been a challenge so information architecture and UX/UI were a priority to ensure that users could find the information they needed on the site.



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XCMWORKFLOW IS:

# FLEXIBILITY

IMPLEMENT PROCESS EFFICIENCIES AND FACILITATE WORK-LIFE BALANCE




**XCMworkflow for Tax**  
XCMworkflow moves tax returns from preparer to reviewer, then through to sign-off, to ensure returns are completed accurately and effectively.

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**XCMworkflow for Accounting/CAS**  
XCM enables CAS departments to manage each engagement through configurable workflows, processes, procedures, and terminology.

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**XCMworkflow for Audit**  
XCM is for auditors managing multiple engagements through the scheduling, planning, wrap-up, and post-field work activities.

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## WHY WORKFLOW AUTOMATION?



# Solution

Prior to starting design, Wakefly reviewed market research data provided by XCM in order to understand their Buyer Personas and the Buyer's Journey each persona goes through during each stage of the funnel. We also performed a deep analysis of their Google Analytics account. We used this data to inform our recommendations on:

- Content strategy
- Information architecture
- Website flow
- UX/UI
- On-page seo optimization

## Step 1: Content Strategy

The project began with Wakefly using the existing research and data to identify a buyer's journey for each type of target customer at the following stages:

- Pre problem recognition
- Awareness
- Problem recognition
- Internal and external search
- Evaluation and decision
- Purchase

We then compared those journeys with the existing content that XCM had on each of their three sites and identified any gaps to make additional content recommendations. By filling these content gaps, XCM could feel confident that no matter what stage in the funnel a potential customer was at, they would be able to find what they are looking for on the site.

## Step 2: Information Architecture and User Flows

Next, we organized the content into a sitemap and made recommendations on navigation, calls to action and wireframes for the types of content that would appear on the site. User flows were developed to set up content and internal linking in a way that would naturally drive the users to the content that they are looking for as well as the content we want to guide them towards.



## Step 3: User Experience

With a clear understanding of the audience, goals and content for the site, Wakefly created some design concepts, starting with the homepage, for the new site. These design variations all took into account XCM's new branding guidelines, coupled with the UX/ UI recommendations from our marketing team. Once the design treatment was established, it was applied to all of the interior page layouts based on the approved wireframes.

## Step 4: Implementation and Optimization

Technical requirements (such as custom functionality and integrations) were agreed upon in tandem during the design phase of the project. As the technical development plan was coming together, we also designed and implemented a Google Analytics tracking strategy that would give XCM the ability to measure and gain complete insight into user engagement. We also performed keyword research and on-page technical SEO optimizations to help with organic traffic. There was also an extensive 301 redirect strategy that was implemented to prevent any orphaned pages from being created during the consolidation process. Once design and planning was complete, the technical implementation was completed and the site was fully tested for quality assurance.

# Results

In the first month after launch, we already started to see positive results compared to the same period last year:

- Pages per session - up 24%
- Average session duration - up 53%
- Bounce rate - down 12%

All of these metrics confirmed increased user engagement on the site.

# Wakefly

Wakefly is one of the oldest and most experienced Kentico Solution Partners. Wakefly has been a Kentico Gold partner since the inception of the partner program in 2008. Our vast portfolio of highly technical and marketing-focused websites allowed us to achieve Kentico's highest honor, Quality Expert.

Whether you are in the market for a new website or just need help to make updates to an existing Kentico site, we can act as an extension of your team to help you achieve your goals. Wakefly's entire project team has experience working with Kentico, including certified developers and EMS certified marketers, so you can feel confident entrusting us with your site.

Wakefly creates digital experiences that matter. We craft unified, online marketing strategies to help you to reach more prospects and customers. Our methodical, data-driven approach ensures that we engineer the digital solution that's right for you.