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OUR NEW WORKING PARTNERSHIP WITH XERO.



Simple and smart.

This **interactive PDF** is designed to be viewed onscreen, be accessed frequently ("Bookmark" it or save to your PC) and used as a resource for your business.

If you choose to print, join Xero in working towards a sustainable environment by printing only one copy for your team using 100% recycled paper. Please note that this

resource has intentionally been designed to use minimal colour, in order to reduce both your print costs and its environmental impact.

Text that appears with an underline will link you to either an external webpage or another page within this document. You can navigate through the document using the arrows at the top of each page.



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CONGRATULATIONS

on becoming a Xero Certified Partner. We're delighted to have you onboard and we're ready to help you promote Xero to your own clients – **adding the Xero value** to your own service.



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1. GET ONLINE

Add the Xero Certified Partner logo to your own website. Better still create a [full Xero page on your website](#) – not only to promote your certification but to tell your existing (and potential) clients about the benefits of using Xero. It's simple.



YOU CAN CLICK ON THIS
LINK TO SEE AN EXAMPLE



NOT ONLINE OR NEED HELP?

Check out our [Hints & Tips for online assistance](#)



GET ONLINE: FOUR EASY STEPS.

- 1) Create a dedicated Xero landing page for your website.
- 2) Once you have your page ready, get your partner listing in the Xero directory. Supply your practice logo in an electronic format, e.g. GIF or JPEG file, to your Account Manager together with your website URL. Also include a brief outline of your Xero practice services and your correct contact details.
- 3) Getting your details in to Xero Help – talk to your Account Manager to organise this.
- 4) Start commenting on blogs like blog.xero.com and participating in online communities – this can be a great way to build up your practice profile as an industry expert if there is a particular subject that you specialise in.



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2. TELL THE WORLD

Tell the world. Start with your own team members. Formally introduce Xero using a [presentation](#), send an email with video links or demo it at your next team meeting. Let them know the [benefits of being a certified partner](#).

Next – tell your existing clients all about Xero and the benefits they'll receive from your new partnership.

You know your clients the best, so you choose how you want to communicate with them – email, letter, newsletter, advert in the local paper or even a phone call.

Use your logo, your letterhead, and your email address. Your new partnership is a valid reason to communicate with clients who you may not frequently talk to.

To give you some inspiration the following section Our New Partnership. Working With Xero will give you some examples of how these items could work. Feel free to use the content and ideas – just add your own logo and brand images.



Get Your Team On Board

Often the most effective way of introducing a new service is to come straight to the point and explaining how your colleagues will benefit.

As a Xero Certified Partner, your business receives:

- *Xero Practice Ledger (a free version of Xero that you can use for running your practice)*
- *Xero Partner Edition – allowing you to manage your clients Xero subscriptions directly and offer Xero Cashbook and client-managed services exclusive to Xero Partner Edition*
- *Discounted pricing for Xero Business Editions*
- *Additional support beyond online and email through your account manager and direct Xero team. This includes assistance from Xero when converting large groups of clients to Xero at any given time*

[CONTINUED >>](#)



Get Your Team On Board (continued)

- *Resources designed specifically for Certified Partners, including marketing material to assist with promoting Xero to new and existing clients*
- *A listing of your business on Xero's online advisor directory.*

Will using Xero make your team members working life simpler? Of course. As Xero is an online application available through any web browser, accounting practice staff can work from home or at locations away from the office if need be.

Small business owners often work on administrative tasks late at night. Having a few of your employees shift some of their work until after dinner may substantially increase their work-life balance and provide a valuable service to your clients.

Xero brings “anywhere, anytime” to your business too.



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CONTINUOUS LEARNING – BECOME CERTIFIED

While Xero is easy to learn, certification training will ensure you and your colleagues get the full value and benefits Xero can bring to your business. There is no limit to the number of certified team members you can have – share the knowledge and the skills.

Xero frequently runs certification training courses, online and classroom style. From free webinars to full certification, there is a full range of options available for you and your team.



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OUR NEW PARTNERSHIP. WORKING WITH XERO.

*So now you're a Xero Certified Partner – **spread the word**. Use your partnership as a legitimate reason to contact all your clients and tell them your good news.*

The following paragraphs are **a guide for you to use when introducing your existing clients to Xero**. This information can be used in its entirety or as excerpts when communicating in 'the voice' of your organisation.



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HERE'S SOME WAYS YOU CAN INTRODUCE XERO:

- Send your entire client base an [email introducing the partnership](#), incorporating your logo and the Xero Certified Partner logo.
- Write a [leading article for your next newsletter](#).
- Add an insert with your next invoice or client report.
- Try the personal touch - call your clients.
- Write a [letter](#) to all your clients.
- Take the Xero Certified Partner logo (that links to the page on your website featuring Xero), a simple fact that encapsulates what Xero is (e.g. "Online accounting that's Simple. Smart. Secure.") and a key benefit of using Xero, then add this to your email signature. Just remember to update it frequently.

Whichever way you communicate with your clients, combine the Xero Certified Partner logo with your own.



What is Xero?

- *Xero is an easy to use but powerful online accounting system that's designed specifically for small businesses.*
- *Xero provides a view of financial information in real-time. There's no need to buy expensive software and install upgrades. Xero is available on your PC or Mac in the office, at home or on popular mobile devices – anywhere, anytime.*
- *Xero automatically imports your bank statements daily so you can keep abreast of your cashflow. Xero has a full suite of accounting features such as invoicing, payables, expense claims, GST, tax returns, reporting and much more.*
- *The beauty of Xero is you can invite a number of trusted people such as us, your accountants, to collaborate online. No more cumbersome transfer of data that can be corrupted or is out-of-date.*
- *To find out more go to www.xero.com where you can try Xero for free.*



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Why We Partner With Xero

- *Xero is designed to help you better manage your business, with a real-time view of your cashflow.*
- *Xero's intuitive design and functionality make accounting accessible for both experts (accountants) and non-experts (small business owners).*
- *With your permission, you the client and we your advisors, can collaborate online. No need to send large out-of-date files back and forth, or for either party to upgrade software to be compatible with the other.*
- *Xero is constantly evolving and relies on direct feedback from business owners and accountants to deliver what they need.*
- *We believe in offering our clients solutions that are suitable and cost-effective. Xero is that solution.*



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TRY USING ANY OF THE FOLLOWING:

Xero

An online accounting system, Xero gives you and your advisors easy access to your bank transactions, invoices, reports, even your GST.

At a glance, Xero's dashboard gives you:

- *A summary of all your bank accounts' details and balances*
- *Visibility of how much money you have coming in and going out*
- *Outstanding staff expense claims*
- *The ability to drill down to see transaction details*



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TRY USING ANY OF THE FOLLOWING ALSO:

Manage your banking and billing with ease

Xero's intuitive invoice entry means you can enter your invoices quickly and efficiently, whether you are creating an invoice for one or many items.

- *You can create a schedule to automatically generate invoices on a regular basis, saving you the time and hassle of entering the invoice manually every month.*
- *You can email formatted invoices directly to customers from within Xero and you can choose to email a copy to yourself.*

Xero has made bank reconciliation easy and fun. You can automatically import your bank statements into Xero daily, so you don't waste time downloading and uploading bank files manually.



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TRY USING ANY OF THE FOLLOWING ALSO:

Keeping on top of payables is easy with Xero

Xero lets you track where your money is going and why. You can:

- *See all your outstanding invoices at a glance.*
- *Set up repeating payables invoices for regular suppliers.*
- *Approve shared workflows to relieve the business owner.*
- *Enter receipts for your expense claims as you collect them, or all in one go.*
- *Choose to pay part or all of a claim. You've got all the information about the claim on hand to help make the decision.*
- *Approve or decline each receipt in a submitted expense claim. The entire expense claim can then be authorised.*



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TRY USING ANY OF THE FOLLOWING ALSO:

Anywhere, anytime

Xero is web-based so you can work where you want, when you want.

- *24/7 access from any internet connection in the world – PC, Mac, iPhone, BlackBerry or other Windows Mobile device.*

Xero requires no installation, manual backups, maintenance or additional software. All updates and new features are available to you when you next login.



LINKS TO:

[The Benefits of Xero - Example of applications](#)



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3. TELL PROSPECTIVE CLIENTS ABOUT XERO.

Make your firm stand out by offering Xero as part of your service. Whether you are [advertising](#), writing a [formal letter](#), sending a [newsletter](#), making a scheduled sales call or replying to an online enquiry – use the opportunity to introduce prospective clients to Xero.



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TELL PROSPECTIVE CLIENTS ABOUT XERO.

We've put together a selection of content to help you introduce Xero. Included are examples of how to use this content – remember to lead with your own brand and incorporate the Xero certified partner logo.

Seeing is often believing. www.xero.com has a [full range of videos](#) that are ideal for Partners to use as part of their own communications to demonstrate Xero. When crafting online communications provide a link to these videos or use the links when presenting to prospective clients.

Whichever way you choose to communicate to prospective clients, tell them about Xero. The content below is designed to help you do this. You just select the sentences or paragraphs that suit your needs.



THIS LINK WILL
LAUNCH YOUR
INTERNET
BROWSER
TO VIEW THE
CONTENT



What is Xero?

- *Xero is an easy to use online accounting system that is designed specifically for small businesses.*
- *At its core, Xero is an easy-to-use but powerful online accounting system for SMEs and their advisors.*
- *Xero includes a full accrual accounting system with a cashbook, automated daily bank feeds, invoicing, debtors, creditors, GST and reporting.*
- *Xero is an online accounting system that gives you access to your financial information anytime, anywhere. Xero updates your financial information in real-time.*



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Xero is great for small businesses like you.

- *Xero was designed from the ground up with small businesses in mind. Xero allows you to monitor financial performance in real-time - so you always know the state of your cashflow.*
- *With Xero you pay a fixed monthly fee. So, no more expensive software to buy, install and upgrade.*
- *Xero lets you do your accounting at home, out of the office or overseas. As long as there is an internet connection you can have access to your financial information anywhere, anytime.*
- *Xero allows you to share information online and collaborate with trusted advisors such as your accountant.*
- *With Xero it's easy to switch your data from another accounting system and get set up.*



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USING THIS CONTENT

- Add to [letters](#) or [emails](#) when introducing your services.
- Use statements as headers for [newsletters](#) or even in [advertising](#).
- Use as solutions to FAQ [on your website](#)
- Add to copy on [your own website](#)

However you choose to use the Xero content – remember that whilst your organisation is a Xero Certified Partner and Xero is part of your overall service offering, the communication is from your organisation and therefore should be on your letterhead, with your logo and your contact details.



THESE LINKS
WILL TAKE YOU
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4. GETTING YOUR EXISTING CLIENTS ONBOARD

You've added the Xero Partner logo to your website, you've started using Xero yourself, have a couple of clients using Xero – now is the time to personally introduce the benefits of Xero to your client base.



Tell your clients about Xero

What Xero is, why you recommend it and what the benefits are through:

- A Xero specific [email](#) or [letter](#).
- Including a Xero specific section/update in your regular client [emails](#).
- Including a Xero specific section/update in your [newsletters](#).
- Enclosing a Xero brochure with client monthly/quarterly reports.
- Adding a final paragraph about Xero to client communications.
- Establishing regular demonstrations of Xero in-house that also include your own services such as training and support.



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Keep reminding your clients about the Xero Partnership.

- *Add your Xero Certified Partner logo to all your communications, including your invoices.*
- *Include [Benefits of Xero](#) as an email attachment or print this off and have it co-branded with your own logo to send out with letters/hard copy invoices.*
- *Add a link for Xero's [online videos](#) to your emails.*

Remember that whether you introduce a regular billing and/or a value added service using Xero as a platform, you will need to provide details about your pricing arrangements and billing plans.



They are your clients – be as direct as you wish to be. A few ideas:

- Segment your client base by selecting those who you know are **due for an upgrade** on their traditional PC based software.
- Identify clients who send their accounts to you on **spreadsheet** or even **manually**.
- Consider clients who prefer to **communicate with you via email**. Chances are they are frequently online and Xero is a perfect solution.
- Group your clients by **industry** – target your communication and the benefits of Xero specifically to them.
- Invite your high-value clients for a **personal demonstration**.
- Invite your **local** clients to a group demonstration of Xero.



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STUCK FOR WORDS?

We've put together a whole raft of content for you to use as a guide or even use in its entirety, plus [examples](#) of how it can be used. This includes a full [presentation of Xero](#) (allowing you to add your own branding) to be used at a specific event or information evening to promote Xero, [the benefits of Xero](#) and the [benefits of subscribing to Xero via a Certified Partner](#).

The content is suitable for emails, newsletters, letters, brochures, adverts and more. Include a [customer sign-up form](#) for Xero with your business brochures.

Need a little financial support for your marketing campaign? You may be eligible for some funding from Xero. Talk to your Account Manager to find out more.



What is Xero?

- *Xero is an easy to use but powerful online accounting system that's designed specifically for small businesses.*
- *The privacy and security of your data is taken care of and is stored on Xero's secure servers, where it's backed up regularly. This means even if your computer is lost or stolen your data is safe.*
- *Xero automatically imports your bank statements daily so you can keep abreast of your cashflow. Xero has a full suite of accounting features such as invoicing, payables, expense claims, GST, tax returns, reporting and much more.*
- *The beauty of Xero is you can invite a number of trusted people such as us, your accountants, to collaborate online. No more cumbersome transfer of data that can be corrupted or is out-of-date.*
- *To find out more go to www.xero.com where you can trial Xero for free.*



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BUNDLING WITH XERO

When you introduce Xero as a bundled service, use the following as a guide when advising your clients about changing to regular billing and/or value added services (provided by you), using Xero as the platform. This information can be added to communications created in the voice of your organisation. You will also need to provide details about your pricing arrangements and billing plans.



Bundling With Xero

- *We'd like to offer you a new service that bundles a number of functions for a regular fixed price.*
- *This will help you better manage your cashflow because there won't be any surprises or big bills come year-end. You'll know in advance exactly what you're being billed for. With your accounts up-to-date we'll be able to help you grow your business and meet goals.*
- *Our partnership with Xero makes this value-added service possible. Through Xero we can offer you an online accounting system that's designed specifically for small businesses and is easy to use.*
- *Xero gives you a view of your financial information in real-time. You can access this anytime – at home or out of the office, overseas – anywhere there is an internet connection.*

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Bundling With Xero (continued)

- *Xero offers automated daily bank feeds, making reconciliation easy and fun, so your bank statements are imported into Xero and you don't waste time downloading and uploading bank files manually.*
- *With Xero you can choose to invite us to work with you online.*
- *For more insight into Xero, you can register for [Introducing Xero for your Business](#) – a free half hour live demonstration delivered over the web.*



LINKS TO:

[Example Letter Introducing Xero to Existing Clients](#)

[Example Letter of Introducing Existing Clients to a bundled service](#)



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BENEFITS OF XERO

*Simple. Smart. Secure. Xero puts you in control of your business.
Xero is an online accounting system that gives you and your advisors
easy access to your bank transactions, invoices, reports, even your GST.*



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Real-time view

You'll always be on top of your cashflow. At a glance the Xero dashboard gives you:

- *A summary of all your bank accounts' details and balances*
- *Visibility of how much money you have coming in and going out*
- *Outstanding staff Expense Claims*
- *The ability to drill down to see transaction details*



Banking and billing with ease

Xero lets you enter your invoices quickly and efficiently, whether you are creating an invoice for one or many items.

- *You can create a schedule to automatically generate invoices on a regular basis, saving you the time and hassle of entering the invoice manually every month.*
- *You can email formatted invoices directly to customers from within Xero and you can choose to email a copy to yourself.*

Xero has made bank reconciliation easy and fun. You can automatically import your bank statements into Xero daily, so you don't waste time downloading and uploading bank files manually.



Manage your payables

Keeping on top of your payables has never been easier. Xero lets you track where your money is going and why.

You can:

- *See all your outstanding invoices at a glance.*
- *Set-up repeating payables invoices for regular suppliers.*
- *Approve shared workflows to relieve the business owner.*
- *Enter receipts for your expense claims as you collect them, or all in one go.*
- *Choose to pay part or all of a claim. You'll have all the information about the claim on hand to help make the decision.*
- *Approve or decline each receipt in a submitted expense claim. The entire expense claim can then be authorised.*



Anywhere, anytime

Xero is web-based so you can work where you want, when you want.

- *24/7 access from any internet connection in the world – PC, Mac, iPhone, BlackBerry or other Windows Mobile device.*

Xero requires no installation, manual backups, maintenance or additional software. All updates and new features are available to you when you next login. Help is always at hand with free, unlimited email support, a comprehensive online Help Centre and an expansive library of videos from getting started tours to tips and tricks.



Secure and private

Xero stores all your accounting information on highly secure corporate grade servers that are automatically backed up.

Xero lets you can collaborate with your trusted advisors online. You can:

- *Control who has access to your data and what they see, with tiered user permission levels and records of when a user last logged on.*
- *Allow employees to create invoices and expense claims, but not have access to your bank accounts and reports.*
- *Lock accounting periods to close off a tax period, and prevent other users changing your data.*
- *Eliminate the need to email or send vital data insecurely by disc.*
- *Rest assured your data is safe. Unlike desktop applications, data isn't stored on your computer, so it's not compromised if lost or stolen.*



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BENEFIT OF BEING A XERO CLIENT WITH PARTNER

Your client asks, “We want to use Xero. Should we just go to xero.com or through you – our accountant? What’s best?”

Xero customers receive the same benefits when signing up to Xero directly as they do when you their advisor is the subscriber. But there are obvious advantages if you their trusted advisor is on the same page. As a Xero Certified Partner you can offer your clients additional training and support. You also have the opportunity to bundle value added services.

Xero Cashbook is only available to the clients of Xero Certified Partners. With Xero Cashbook your clients can manage their cash on Xero, leaving you, their trusted advisor, to manage the rest of their accounts. As your client’s confidence and ability grows, they can be introduced to more Xero functionality, with training and support provided by you.

Here are some ways to respond to clients when they ask why they should go through you. The following can be used as part of a FAQ section on your website, in an email or letter or at a demonstration or a general discussion:



Responses to clients when they ask why they should go through you

- *With Xero Cashbook you can contact us any time with a query about Xero or a question about cashflow. You simply use the “Ask My Accountant” function within Xero.*
- *Xero Partner Edition (which is exclusive to Xero partners) has options such as “No GST Cashbooks” at a reduced rate. Such discounts are not available through the standard Xero subscription – perfect for businesses not GST registered.*
- *Only the Partner Edition offers “The Managed Client” role. This gives small business owners the ability to interact with their accountant by making comments in the bank reconciliation fields. The advisor retains the overall financial management role.*
- *Subscribing through a Xero Certified Partner is an ideal way for small business owners to broaden their financial management skills. Working with your accountant you can extend from a “Managed Client” basis, to “Cashbook” (managing your own cashflow), to a full Xero subscription, managing invoices, accounts payable and reporting – all with the support of a trusted advisor.*



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In response to general “Why change to Xero?”, try any of the following:

- *Working together with Xero we, your advisors, can login and view your accounts. This lets us provide immediate and valuable advice in real-time.*
- *Having trained on Xero we can assist your set-up by importing old accounts, using files from your existing accounting systems and .csv, ofx and .qif files for all bank accounts. This will ensure the transition is seamless.*
- *The strongest message you give your clients is how important and advantageous it is to have the ability to collaborate online so you see the same data at the same time. You the advisor are also there to support the client through the complete process of setting up their business on Xero and providing ongoing support and training when needed.*



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Responding to Pricing Objections

They're keen to move to Xero but have concerns about paying an ongoing subscription fee - how do you respond to your clients? Use any of the prompts from the table below to use as a framework for your response.

OLD WAY	XERO
Cost	Revenue
Invisible	Visible
Write Offs	Write Ons
Multi Solutions	One System
Annual Bill	Monthly Bill
\$2,000 (NZD)	\$2,400 - \$200 (NZD) per month
Annual Accounts	GST / 2 monthly reports
Tax Returns	Annual Accounts / Tax Returns
Banklink + AO	Xero (+AO)
Break Even	Increases EBIT



UPDATE TO
REFLECT OWN
COUNTRY PRICING



CHANGE TO
VAT OR BAS
DEPENDENT ON
YOUR LOCATION



1. GET
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TIPS & TOOLS

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As a Xero Certified Partner this is your resource centre. We've included email, letter and newsletter examples for introducing Xero to your existing clients and prospective clients, as well as simply explaining the benefits of Xero and using Xero's functionality via your practice.

Use these examples as ideas for your own communication. Alternatively take along as samples to your design agency to create your own versions, or simply copy the content and produce yourself.

However you choose to use these resources - remember that the communication is to your clients, from your business. Include the Xero Certified Partner Logo but the main branding should be yours.

For partners needing a little more assistance, we've put together [Hints & Tips for online communication](#), [selecting an agency](#) and [using the Xero brand](#).



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[1. Website](#)

[2. Newsletter](#)

[3. Letters](#)

[4. Emails](#)

[5. Advertising](#)

[6. Sign-up form](#)

[7. Client Power Point Presentation](#)



**USE ANY OR ALL OF THE CONTENT
FROM THESE EXAMPLES.**

1. USE YOUR MOUSE TO HIGHLIGHT
SELECTED CONTENT,
2. COPY CONTENT
3. CHOOSE “PASTE SPECIAL” AND CHOOSE
“UNFORMATTED TEXT” OPTION



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YOUR WEBSITE XERO LANDING PAGE





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PROSPECTS

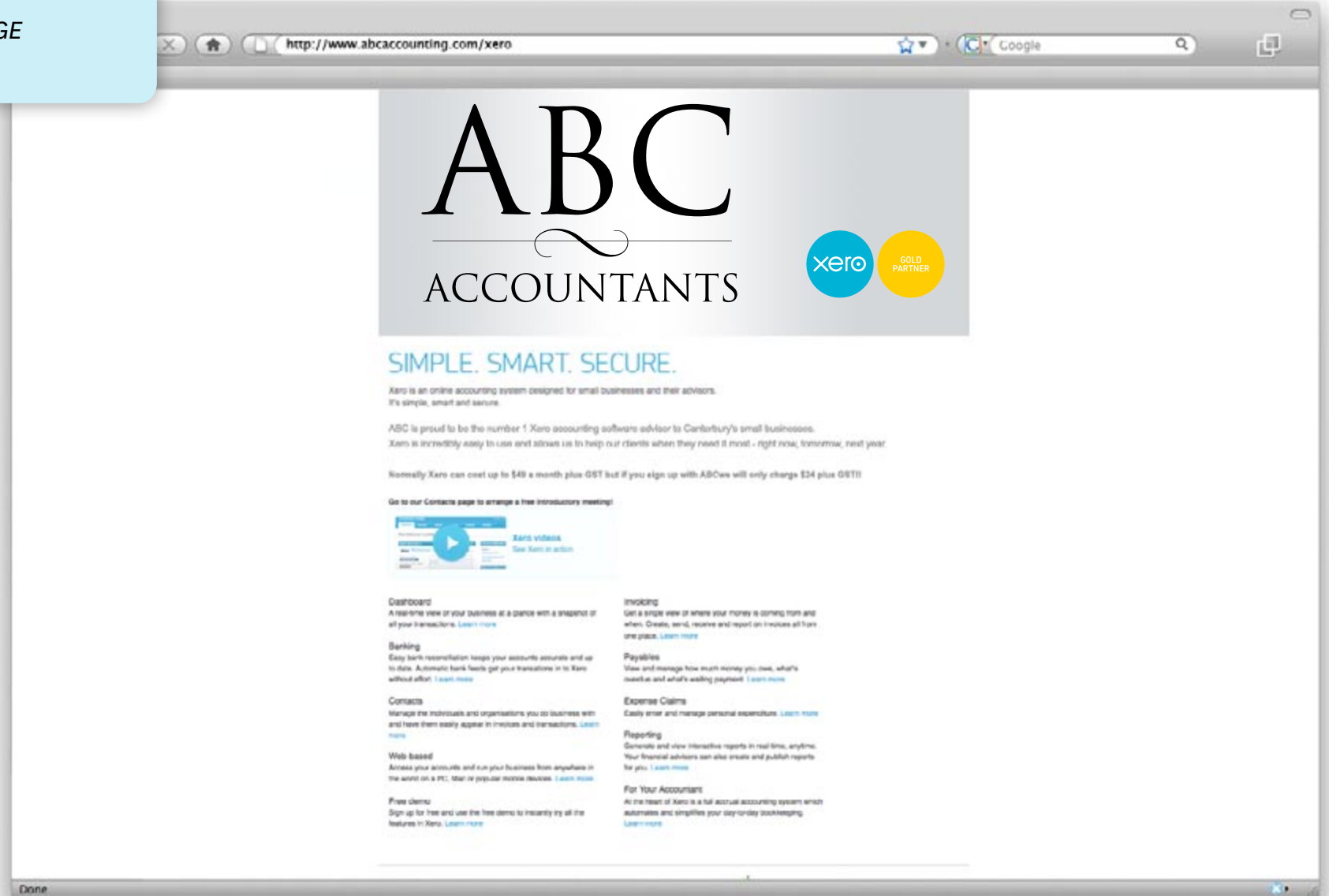
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YOUR WEBSITE XERO LANDING PAGE





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YOUR NEWSLETTER
BENEFITS OF XERO WITH
CERTIFIED PARTNER



CHANGE TO
VAT OR BAS
DEPENDENT ON
YOUR LOCATION

ABC *Newsletter*
ACCOUNTANTS JANUARY 20XX | EDITION #XXX



Working together.

You, ABC Accountants and Xero.

Proud to be a Xero Certified Partner, we've extended our client services to include the following functions, which are exclusive to Xero Partners:

Xero Cashbook. Manage your cashflow online with Xero, but leave the rest of your account management in our hands. Contact us any time using the "Ask My Accountant" button on the Help menu in Xero Cashbook if you have any queries.

Managed Client Role. If you don't have time or feel uncomfortable about managing every aspect of your accounts, but still want to have visibility of your cashflow then the Xero Managed Client function is for you. This lets you make comments about your bank reconciliation whilst we manage it.

No GST Cashbooks. We can offer reduced rates for businesses that are not GST registered. This is perfect if you are just starting out or a non-profit organisation.

*Call us now for more information on our extended services
or to arrange a free Xero demonstration.*



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YOUR NEWSLETTER BENEFITS OF XERO



CHANGE TO
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DEPENDENT ON
YOUR LOCATION

ABC *Newsletter*

ACCOUNTANTS JANUARY 20XX | EDITION #XXX



Xero. Puts you in control of your business

Tired of your accounting system and having to manually send files and data to us each month? Try Xero. It's an online accounting system that gives you and authorised users, such as our team, easy access to your bank transactions, invoices, reports and even your GST.

Three great reasons to try Xero:

- 1. Real-time view of your cashflow.** Xero's dashboard gives you a summary of all your bank account details and balances, and shows you how much money you have coming in and going out – plus the ability to drill down to see transaction details.
- 2. Manage your own billing simply.** Xero lets you enter your invoices quickly and efficiently, letting you create a schedule to automatically generate invoices on a regular basis – you can even email formatted invoices directly to your customers from within Xero.
- 3. Anywhere, anytime.** Xero is web-based so you can work where you want, when you want with 24/7 access from any internet connection in the world – PC, laptop, Mac and even a smartphone. Xero requires no installation, manual backups, maintenance or additional software – all you need is a modern internet browser.

*For more information go to www.xero.com
or give us a call for a free demonstration.*



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YOUR NEWSLETTER
INTRODUCING XERO TO
EXISTING CLIENTS

ABC *Newsletter*
ACCOUNTANTS JANUARY 20XX | EDITION #XXX



Xero. Online Accounting In Real-Time.

Mistakes – they happen. Sharing different versions of files. Always wondering if it the most up to date file you sent or an old one? Xero is an online accounting system where your important financial data is stored securely in one central place – meaning there is only one version and with automated bank feeds it is always up to date. With Xero you can choose to invite us to work with you online – in real time. No more cumbersome transfer of data that can be corrupted or is out-of-date.

*For more information go to www.xero.com
or give us a call for a free demonstration.*

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YOUR NEWSLETTER
INTRODUCING XERO TO
PROSPECTIVE CLIENTS

ABC *Newsletter*
ACCOUNTANTS JANUARY 20XX | EDITION #XXX



ABC Accounting and Xero.

*Connecting Clients in a simple,
smart and secure way..*



We've been offering accounting services to the business community in XXX for XX years. Our expert team of chartered accountants works with clients across a diverse range of industries and organisations.

For small businesses we recommend Xero. Designed from the ground up with small businesses in mind, Xero is an easy to use online accounting system that gives you access to your financial information anytime, anywhere. Xero allows you to monitor financial performance in real-time - so you always know the state of your cashflow. It lets you share information online and collaborate with trusted advisors such as your accountant.

*For more information on Xero and how ABC Accounting can
work with your business, contact us directly on 123 4567 or
abc@abcaccounting.com*



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YOUR NEWSLETTER
XERO EVENT INVITATION



CHANGE TO
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YOUR LOCATION

ABC *Newsletter*
ACCOUNTANTS JANUARY 20XX | EDITION #XXX



Join Us.
See Xero in Action.



Xero – an online accounting system that gives small businesses like you and your advisors easy access to bank transactions, invoices, reports and GST – anytime you need it, anywhere in the world.



We are proud to be a Xero Certified Partner and invite you to attend a short demonstration about Xero. Come and see how simple it is to use, how smart it is for small business owners and how we can work together with Xero.

Join us at our Herd St office, on **Tuesday 25th February at 5pm**. RSVP is essential so please call 123 4567 or email rsvp@abcaccountants.com. If you can't join us, we can book you into an online webinar hosted by Xero – all you need is an internet connection.

For further information about Xero go to www.xero.com



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YOUR LETTER
BENEFITS OF XERO WITH
CERTIFIED PARTNER



YOU MAY WISH
TO CONSIDER
CREATING
PACKAGE
NAMES FOR
YOUR BUNDLED
SERVICES



CHANGE TO
VAT OR BAS
DEPENDENT ON
YOUR LOCATION

ABC
ACCOUNTANTS

Dear <client>

At ABC Accounting we pride ourselves on providing professional and cost effective accounting services to our clients. In our practice we now use Xero, an easy to use but powerful online accounting system that's designed specifically for small businesses like yours.

Xero gives you a view of your financial information in real-time. You can access this anytime – at home or out of the office, overseas – anywhere there is an internet connection. We are proud to be a Xero Certified Partner, enabling us to offer exclusive Xero Partner functionality to our clients.

Using Xero as the platform we have created a selection of bundled service offerings, including exclusive partner functions, designed to meet the diverse and varied needs of our clients. Whether you require us to complete simple compliance or have us act as your virtual CFO – we can offer services in one fixed price package. As well as being transparent, this package will help smooth your business cashflow – no bill shock!

We have assessed what we have been doing for you over the past two years and recommend our new xxxxxxxxxxxxxxxx package.

For a fixed amount of \$xx per month, we will continue to complete for you:

- Annual Financial Statements
- Income Tax Returns
- Tax Administration (Tax reminder and assessment)

You would still manage your own GST, FBT and PAYE returns.

To find out how to move to this package and more about Xero, please call me on <insert your phone number> or drop me a line at <insert your email address>.

Kind regards

<insert your name and title>





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YOUR LETTER BENEFITS OF XERO

ABC
ACCOUNTANTS

Dear <client name>

Thank you for your enquiry regarding our services and in particular Xero.

As a Certified Xero Partner we use Xero for our own business needs, and recommend Xero to our own clients. The benefits are:

1. Real-time view

You'll always be on top of your cashflow. At a glance the Xero dashboard gives you a summary of all your bank account details and balances with the ability to drill down to see transactions.

2. Banking and billing with ease

Xero lets you enter your invoices quickly and efficiently, whether you are creating an invoice for one or many items. You can create a schedule to automatically generate invoices on a regular basis, saving you the time and hassle of entering the invoice manually every month. You can also email formatted invoices directly to customers from within Xero. Simple.

Xero has made bank reconciliation easy and fun. You can automatically import your bank statements into Xero daily, so you don't waste time downloading and uploading bank files manually.

3. Secure and private

Xero stores all your accounting information on servers with corporate graded security which are automatically backed up. Because it is online, Xero lets you collaborate with your trusted advisors, sharing the same data at the same time – eliminating the need to email or send vital data insecurely by disc.

Don't just take our word for it. Try Xero for free or come in for a free demonstration. Please call us on 123 4567 for further details or to arrange a suitable time.

Yours sincerely

<name & signature>





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YOUR LETTER
INTRODUCING XERO TO
EXISTING CLIENTS

ABC
ACCOUNTANTS

Dear <client>

At ABC Accounting we pride ourselves on providing professional and cost effective accounting services to our clients. We are now using Xero in the practice – Xero is an easy to use but powerful online accounting system that's designed specifically for small businesses like yours.

Xero provides a view of financial information in real-time. There's no need to buy expensive software and install upgrades. Xero is available on your PC or Mac in the office, at home or on popular mobile devices – anywhere, anytime.

The beauty of Xero is you can invite a number of trusted people such as us, your accountants, to collaborate online. No more cumbersome transfer of data that can be corrupted or is out-of-date

We think your business is perfectly suited to using Xero. As a Xero Certified Partner we can introduce you to Xero and have you up and running in no time.

To find out more, please give us a call on 123 4567 or email us at abc@abcaccounting.com.

Kind Regards

<insert your name and title>





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YOUR LETTER
INTRODUCING XERO TO
PROSPECTIVE CLIENTS

ABC
ACCOUNTANTS

Dear <prospect>

ABC Accounting has been offering accounting services to the business community in XXX for XX years. Our expert team of chartered accountants works with clients across a diverse range of industries.

We are Xero Certified Partners and can help you and your business get up and running on Xero in no time.

One of the key features Xero offers is automated bank feeds – these allow you to easily reconcile your transactions in real time.

We would love to show you Xero in action and invite you to come along to a demonstration where you'll see why it's the online accounting system everyone's talking about. Light refreshments will be served.

When: 5pm, Tuesday 25th February

Where: ABC Accounting, Herd St Offices

To RSVP please call 123 4567 or email us at rsvp@abcaccounting.com

Yours faithfully

<Your name and title here>

PS: To see why Xero is the world's easiest accounting system,
check out www.xero.com





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YOUR LETTER
XERO EVENT INVITATION



CHANGE TO
VAT OR BAS
DEPENDENT ON
YOUR LOCATION

ABC
ACCOUNTANTS

Dear <client name>

Xero is an online accounting system that gives small businesses and their advisors easy access to bank transactions, invoices, reports and GST – anytime they need it, anywhere in the world.

As a certified partner of Xero, we invite you to attend a local seminar where we will be demonstrating Xero – how simple it is to use and how smart it is for small business owners.

Seminar date: **5pm, Tuesday 25th February**

Location: ABC Accountants, Herd St, Wellington

To RSVP call us on <123 4567> or email <email address here>.

If you can't join us we can book you into an online for a webinar hosted by Xero – all you need is an internet connection.

For further information about Xero go to www.xero.com

Yours sincerely

<name & signature>





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YOUR EMAIL

BENEFITS OF XERO WITH CERTIFIED PARTNER

New Message

Send Chat Attach Address Fonts Colors Save As Draft Photo Browser Show Stationery

To: _____

Cc: _____

Subject: _____

Signature: Signature #3 !

Dear <client>

We'd like to introduce you to our new service – Xero Cashbook. Only available to clients of Xero Certified Partners, Xero Cashbook lets you manage your cashflow online, leaving us to continue to manage the rest of your accounts.

You'll have real-time visibility over what's coming in, what's going out and the ability to reconcile your bank statements simply and securely.

If you have any queries about your cashflow or using Xero, you can contact us directly through navigating to "Ask My Accountant" which you'll find on the Xero Cashbook help menu.

The beauty with Xero is we can work together on the same data at the same time – no messy file sharing or delays.

Click [here](#) for further information on Xero Cashbook - exclusive to Xero Certified Partners like us.

Please contact us if you would like to add Xero's Cashbook to your ABC Accounting service.

Regards

<name & signature>

ABC ACCOUNTANTS xero GOLD PARTNER



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YOUR EMAIL BENEFITS OF XERO

New Message

Send Chat Attach Address Fonts Colors Save As Draft Photo Browser Show Stationery

To: _____

Cc: _____

Subject: _____

Signature: Signature #3 !

Dear <client name>

How simple is it to share data online? Email is almost “instant”, but it can be hard to keep track of attachments and which versions of files sent

With Xero we, as your accountants, can work with exactly the same up-to-date data, at exactly the same time as you. Xero is an online accounting system that securely stores your financial data and allowing you to share it with those you trust. Unlike desktop applications, it’s available anytime, anywhere you have an internet connection.

Check out what Xero looks like and the additional benefits of using Xero by having a look this video (<http://blog.xero.com/2008/12/videos/>). For further information or to arrange a full demonstration with our team please contact us directly.

Regards

<name & signature>

ABC
ACCOUNTANTS

xero

GOLD
PARTNER



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YOUR EMAIL
INTRODUCING XERO TO
EXISTING CLIENTS

New Message

Send Chat Attach Address Fonts Colors Save As Draft Photo Browser Show Stationery

To: _____

Cc: _____

Subject: _____

Signature: Signature #3 !

Dear <client>

Connecting with clients online. It's the ideal means for collaboration, sharing data, listening, making decisions and providing advice – all in real-time. As your financial advisors we can do all that and more with Xero.

Designed specifically for small businesses, Xero is an easy to use but powerful online accounting system. Xero provides a view of financial information in real-time. Xero is available anywhere, anytime from wherever you connect to the internet (meaning you can use your new iPhone to check out your cashflow) and there's no need to buy expensive software and install upgrades.

The beauty of Xero is you can invite a number of trusted people such as ourselves, to collaborate online. No more cumbersome transfer of data that can be corrupted or is out-of-date.

As a Xero Certified Partner we are able to offer a full range of services including Xero Cashbook, letting you to stay in control of your cashflow.

We are offering free demonstrations and trials of Xero to our clients this month. For more information please call and we'll arrange a suitable time.

Regards

<name>

ABC
ACCOUNTANTS

xero
GOLD
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New Message

Send Chat Attach Address Fonts Colors Save As Draft Photo Browser Show Stationery

To: _____

Cc: _____

Subject: _____

Signature: Signature #3 !

Dear <prospective client name>

Thanks for your call last week.

As discussed in addition to offering the full range of traditional bookkeeping and accounting services, ABC Accounting are also Certified Partners of Xero – a simple, smart and secure online accounting system, designed for small businesses such as your own.

Xero lets you do your accounting at home, out of the office or overseas. As long as there is an internet connection you can have access to your financial information anywhere, anytime. Xero includes a full accrual accounting system with a cashbook, automated daily bank feeds, invoicing, debtors, creditors, GST and reporting. Alternatively, included within our range of services you can elect to use Xero Cashbooks – keeping you in control of your cashflow, while leaving us to manage the rest of your financial requirements.

We frequently run demonstrations on Xero. For details of the next event or to learn more, please email or call me on 123 4567 or go to www.xero.com

Regards,
<Name>

ABC ACCOUNTANTS

xero GOLD PARTNER



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YOUR EMAIL

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New Message

Send Chat Attach Address Fonts Colors Save As Draft Photo Browser Show Stationery

To: _____

Cc: _____

Subject: _____

Signature: Signature #3

Dear <client name>

Join us to learn about Xero.

Xero – an online accounting system that gives small businesses and their advisors easy access to bank transactions, invoices, reports and GST – anytime you need it, anywhere in the world.

We are proud to be a Xero Certified Partner and invite you to attend a short demonstration about Xero. Join us to see how simple it is to use, how smart it is for small business owners and how we can work together using Xero.

Come along to our Herd St office, on Tuesday 25th February at 5pm. RSVP is essential so please reply to this email or call 123 4567.

If you can't join us, we can book you into an webinar which is hosted online by Xero – all you need is an internet connection.

For further information about Xero go to www.xero.com

Regards

<name & signature>

ABC ACCOUNTANTS

xero GOLD PARTNER



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YOUR DIRECT MAIL XERO BENEFITS



CHANGE TO VAT OR BAS DEPENDENT ON YOUR LOCATION

ABC ACCOUNTANTS



Xero is the online accounting system that small business owners dream about, providing financial clarity and confidence to business owners and their advisors in real time.

YOU'RE IN CONTROL

Xero is a full accrual accounting system, specifically designed for small businesses.

Xero includes:

- Cash book and general ledger
- Automated bank feeds
- Bank reconciliation
- Accounts receivable invoicing
- GST reporting
- End of month management reporting
- End of year financial statements
- Budget and variance reporting
- Expense claims
- Contact management
- Fixed Assets

10

Reasons Customers
Love Xero

1. Automated daily bank feeds
2. Fast, simple and customised invoicing
3. Available anytime you're online
4. Real-time collaboration with us, your advisors
5. Safe and secure data
6. Quick and easy GST returns
7. Cashflow clarity
8. Unlimited online Xero support at no additional cost
9. No installation, upgrades or maintenance
10. Pay as you go with no up-front costs

ABC Accounting offers our clients the full range of Xero services, including set-up, training and ongoing additional support. Call us now for a free demonstration.

ABC
ACCOUNTANTS



Xero. Connecting ABC Accounting and our clients.



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YOUR ADVERTISING
YOUR BUSINESS AND XERO
AND THE BENEFITS



PLEASE NOTE
THAT THIS
IS EXAMPLE
WORDING ONLY.
WE RECOMMEND
YOU IDENTIFY
WHAT SETS YOUR
PRACTICE APART
AND CREATE COPY
THAT SUPPORTS
YOUR PRACTICE
AND BUSINESS
OBJECTIVES.

Stay in control of your business.

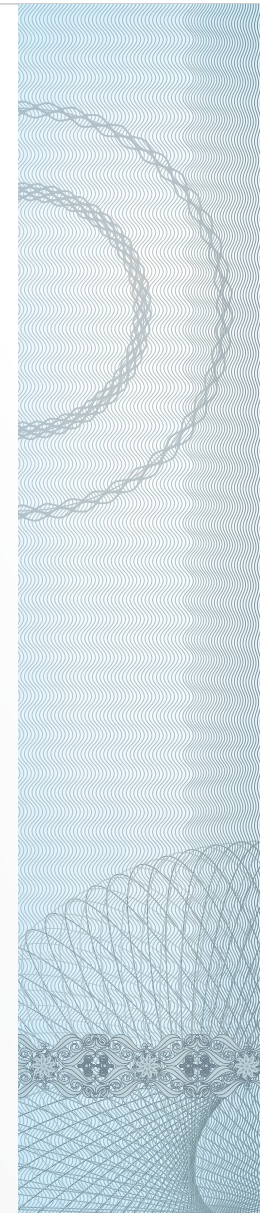
Anywhere, anytime.

At ABC Accounting we believe that managing your business finances should be easy – with Xero it is. An online accounting system designed specifically for small businesses, Xero is smart, simple and secure – letting you stay in control of your business anywhere, anytime.

As a Xero Certified Partner we offer the full range of Xero functionality to our clients – from Cashbook to full service. Call us for a demonstration or to try Xero for free.

Call 123 4567 or visit abcaccounting.co.nz

ABC
ACCOUNTANTS





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YOUR SIGN-UP FORM

sign-up form

ABC
ACCOUNTANTS

First Name

Last Name

Email Address

Phone Number

Business Location

Current system (optional)





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XERO CLIENT PRESENTATION

You've organised an event or seminar to demonstrate Xero to prospective and/or existing clients. Need a PowerPoint presentation to help you out? It's all ready for you here, including a supporting script to help you along with the slides.

Simple to use – just copy and paste the content into your own template including your organisation's logo. Click on the relevant link below to download the presentation.

[New Zealand Partner's Presentation](#)

[Australian Partner's Presentation](#)

[UK Partner's Presentation](#)



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6. HINTS, TIPS & TOOLS

With every significant Xero feature update we keep you in the loop via e-newsletters supported by blogs, webinars and videos.

Ensure your business always has at least one Xero certified team member onboard. Make sure your team take part in our frequent [training courses](#) so they have the skills and knowledge to make the most of Xero for your clients.

Provide your team with ongoing Xero inspiration and user-friendly hints and tips, by [downloading our screensaver](#).

Don't forget Xero's [online support](#). This is available 24-7 to Xero Certified Partners and their clients.



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HINTS & TIPS FOR ONLINE ASSISTANCE

Designing or maintaining your own website doesn't need to be complicated or expensive. A successful website is clear, concise and easy to navigate.

Keep it simple. Ensure that your organisation logo is the most predominant image throughout your website.

The Xero Certified Partner logo should be in a prominent position – usually the left hand navigation panel. Include a link to login to Xero [from your homepage](#) and also (if applicable) your [Xero landing page](#).

Give the [Xero Communication Guidelines](#) to your web designer. They'll know what to do with it.



Hints & Tips for Online Assistance (continued)

When you create your Xero landing page within your website, it is important to include:

- *What Xero is.*
- *The benefits of Xero.*
- *Why you partnered with Xero.*
- *How Xero is included within your service offering – e.g. within a bundle, training, support, set-up and conversion.*
- *Your Xero pricing matrix.*
- *Links to relevant Xero videos from www.xero.com (note these should open in a new window, leaving your website window open).*
- *Contact details within your organisation to learn more about Xero (or a link to www.xero.com).*
- *A Xero Sign-up form.*

[CONTINUED >>](#)



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5. PRACTICAL
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Hints & Tips for Online Assistance (continued)

- *Xero can be included in the address title of this page. Ensure that any references to xero.com are linked to the Xero website.*
- *Check that “Xero” is listed within your search function – leading back to the main Xero page if necessary.*



LINK TO:

[Example of your webpage](#)



HINTS & TIPS FOR SELECTING A WEB OR DESIGN AGENCY

Whether you are selecting your first agency or looking for a change – consider the following when selecting a Web, Design or Advertising Agency.

- *You don't have to play with the "big boys". In all agency arenas there are a growing number of "Indie" agencies – those that have the range of skills, expertise and pricing to accommodate SMEs.*
- *Just like partnering with Xero – there needs to be a good "fit" with your agency. Do you understand each other? Does the culture of the agency work with your organisation?*
- *Do you like what they do for their existing clients?*



On a search for an agency (all types!)

So – who is out there? Ranging from the very large full service agencies (brand, media, design, online), to service specific agencies (e.g. web design only) through to small local part-service agencies (brand, design and media), there is an agency to fit your needs.

Start your search by:

- *Considering businesses whose design/website/advertising you like. Ask who their agency is.*
- *Member of your own industry association? Ask for agency references here.*
- *Look at your own client base. Do you have any agencies within this?*

Once you have identified a few agencies to consider, check out their work online, meet up with them, ask for examples of past and present client work and enquire about their own network (important if they are not a full service agency).

Most importantly, ensure your agency produces work that is unique to your business. [**CONTINUED >>**](#)



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On a search for an agency (all types!)

.....

NZ	UK	Australia
Yellow Pages	Institute of Practitioners of Advertising	Yellow Pages
Google	Google	Google
Finda	192	Sensis
SearchNZ	The Phone Book	Australian Graphic Designers Association
CAANZ	Yell	Communications Council
Marketing Organisation NZ	Scoot	
Better By Design		
Designers Institute of NZ		



LINKS TO:

[**Xero Communication Guidelines**](#)



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SCREENSAVER



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CONTACT US

You can, at anytime, access the [Xero online help](#) here.

For any enquiries specifically to this resource please fill in the form below.

Name:

Email:

Query:

:: *SUBMIT*