

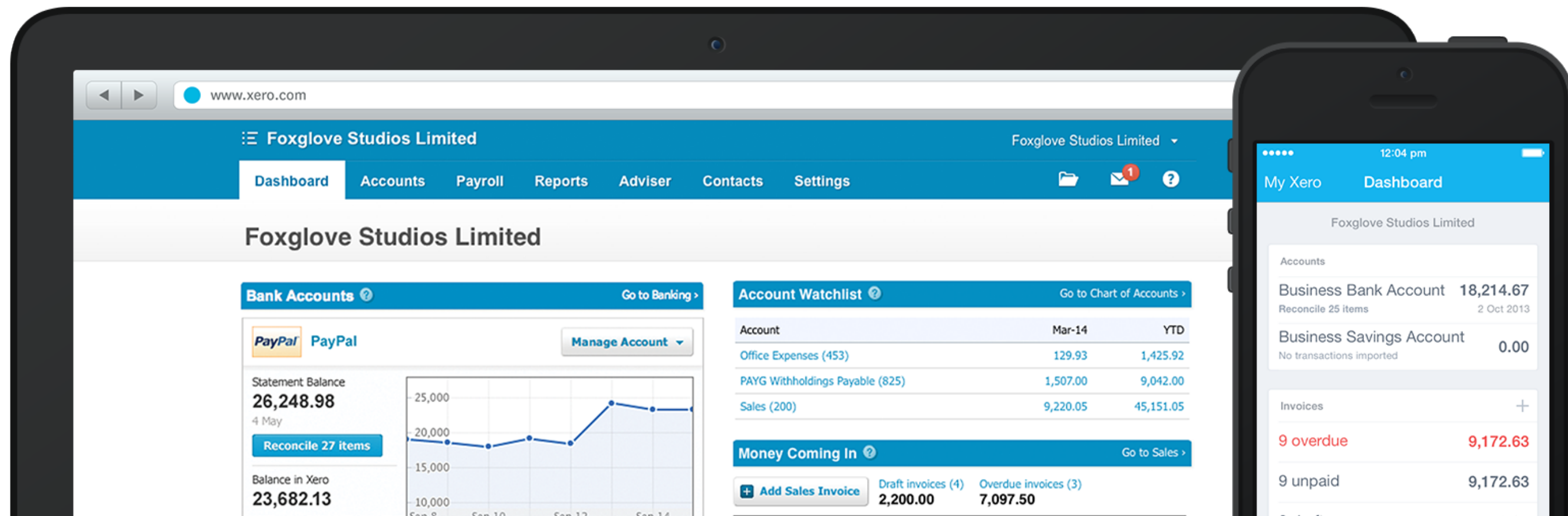
Xero: Your QuickbooksTM Alternative



Beautiful accounting software

Hi! I'm Carla Caldwell.

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Agenda

- Who Xero Is
- What Xero does
- Which clients are a good fit
- Best practices with Xero



Who is Xero?



Who is Xero?

- Global leader in online accounting
- 300,000+ paying businesses!
- 10,000+ Xero accounting partners



Milton Keynes

London

New York

Denver

San Francisco

Los Angeles

17 offices in 12 cities around the world

Brisbane

Canberra

Auckland

Perth

Sydney

Wellington

Melbourne





Forbes



**World's Most Innovative
Growth Company 2014**

**We're built in the
cloud from the
ground up.**

3 mega technology trends



Mobile

In 2011, smartphone and tablet sales exceeded PCs and desktops

Source: Mary Meeker, KPCB, 2011



Cloud

By 2012, 20% of businesses will own no IT assets

Source: Gartner, 2011



Social

By 2014, social will replace email for 20% of business users

Source: Gartner, 2011



**We invest heavily to
protect your data.**

Why Xero?

How we made it happen



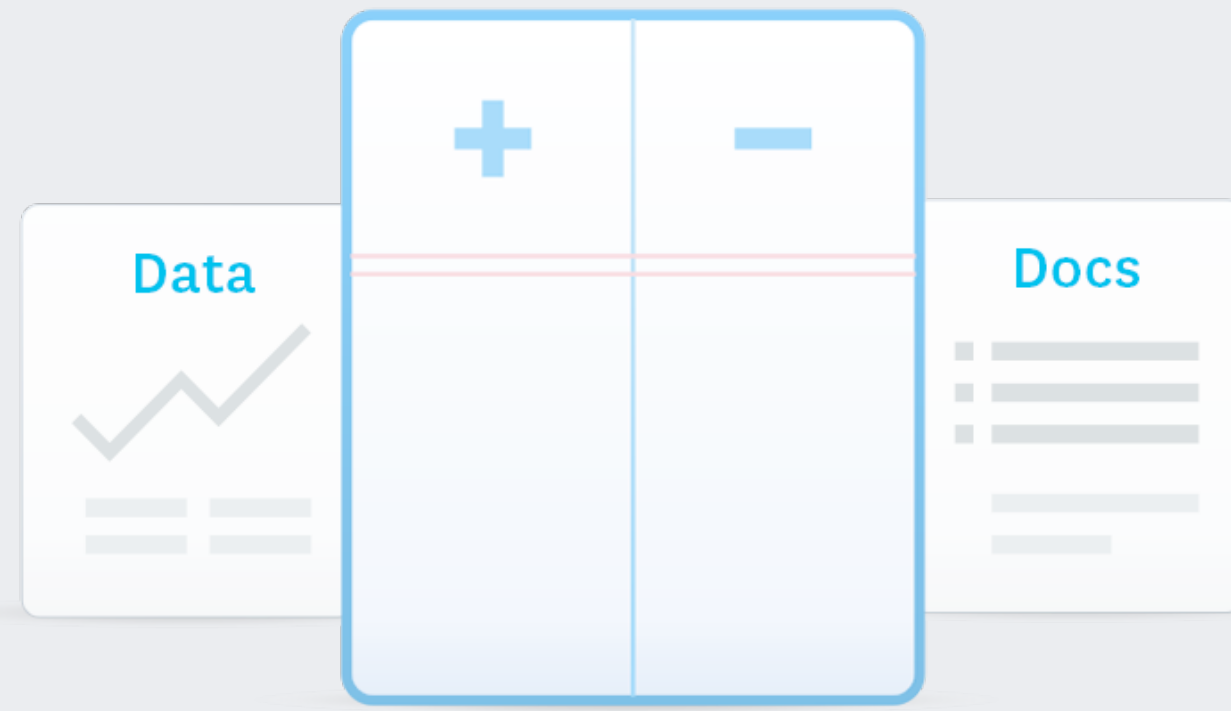
Connectivity



User interface

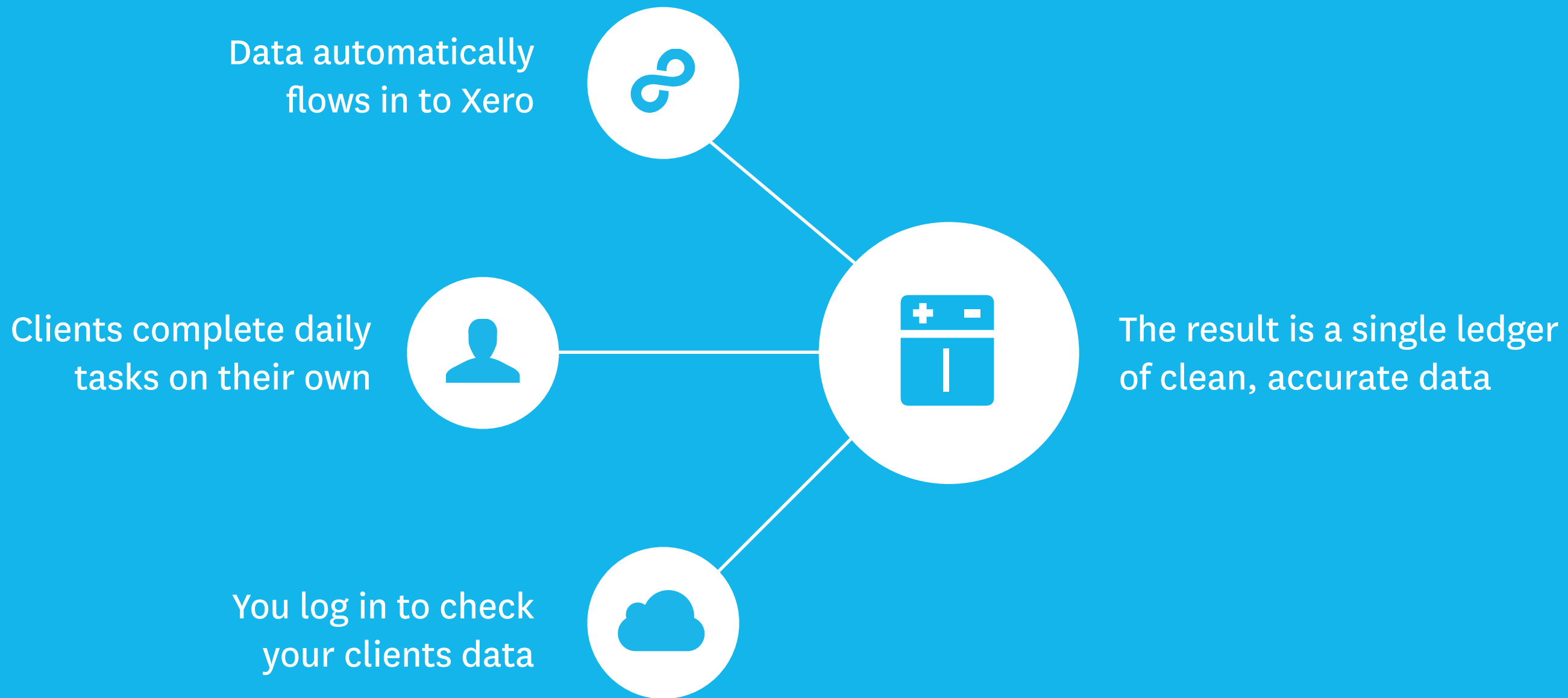


Built in the cloud



The single ledger.
One ledger that you and your clients share.

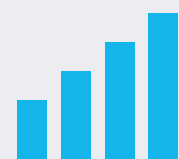
A better workflow



What you get



Efficiency



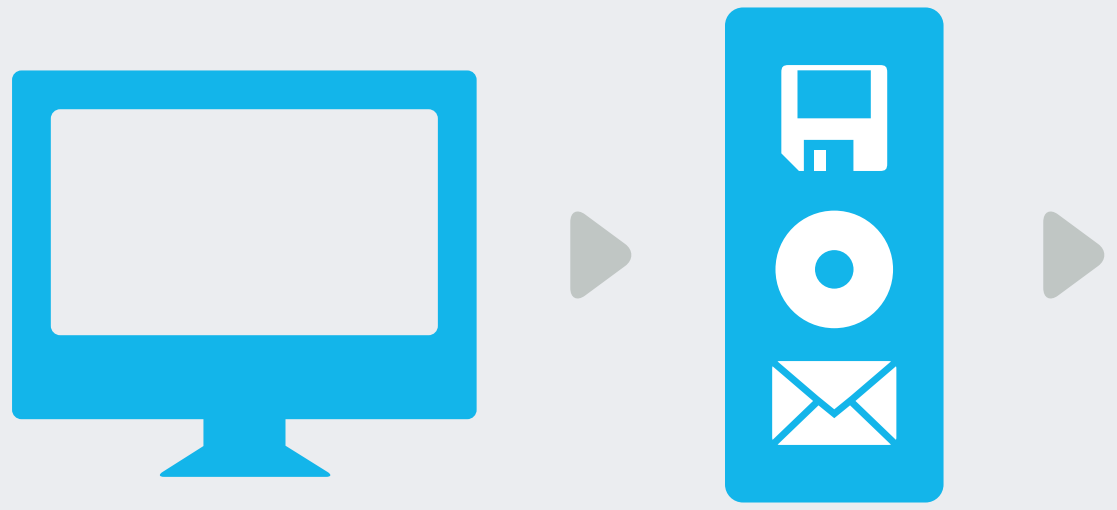
Revenue



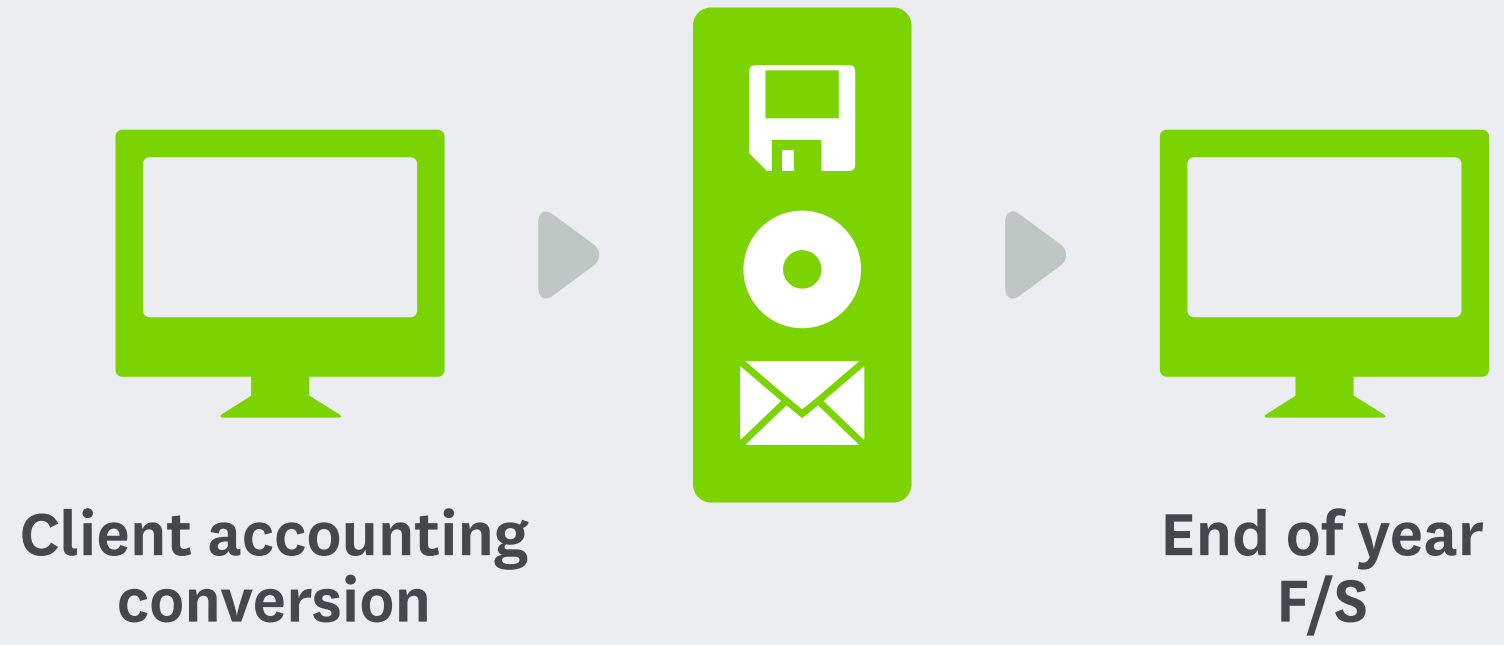
Growth

The old way of working

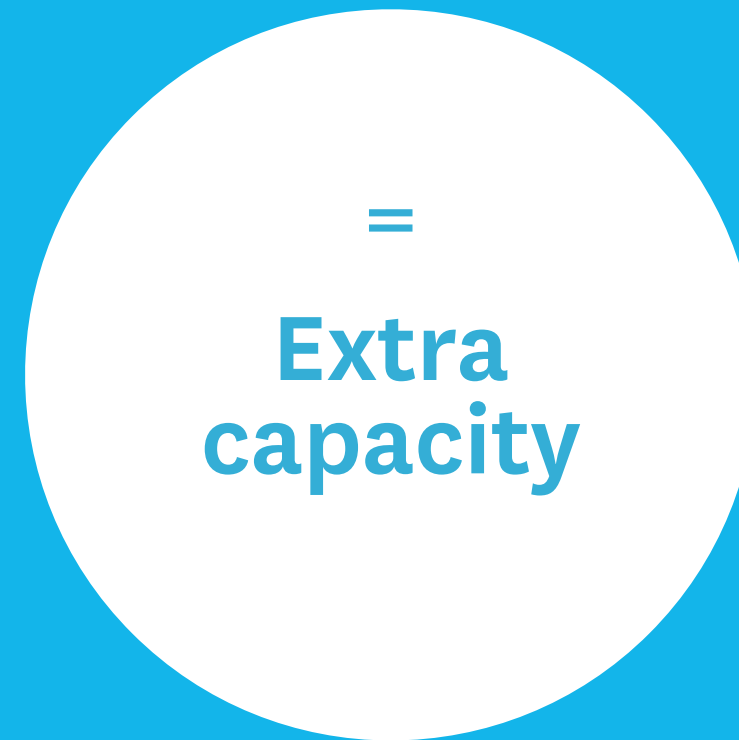
Small business



Accountant



The efficiency paradox



The efficiency paradox

FIXED OVERHEADS



Efficiency

=

**Extra
capacity**

How do we fill the void?

More clients

More compliance work

—— OR ——

More value for existing clients



The answer

✓ **Efficiency**

→ **Bundles**

→ **Management
reports =
Opportunity**

**Build in
efficiency**

**More
services**

**Capacity
increase**

**Proactive
advice**

**1/4ly mgmt
report**




We've actually reached out to other firms that we work with and we're taking on some of their clients by using technology in the cloud, like Xero

BOBBY MEDLIN – BOBBY MEDLIN CPA, US




Features your clients will love

 Bank reconciliation

 Files

 Smart Lists

 Online invoicing



Xero and Square helps the
business owner make better
business decisions.

EAN MURPHY – BOOKKEEPER,
MOXIE BOOKKEEPING, US



Retail



UNLEASHED



Legal



Xero vs Quickbooks

- Free automatic updates
- Built for small businesses & their advisors
- Unlimited users for free
- Connect to over 300 online business applications
- Unlimited 24/7 free support



**It's about more
than software**

It's all about partnership

- Dedicated Account Manager
- Partner Enablement Specialists
- 24/7 Customer Experience experts
- Live and on-demand education





Marketing support



Thanks to the advisory directory, we're
getting new leads from all over the
country and the world.

BRUCE PHILLIPS – CEO,
HARSHMAN PHILLIPS & COMPANY, US

Xero U

Let's take a look

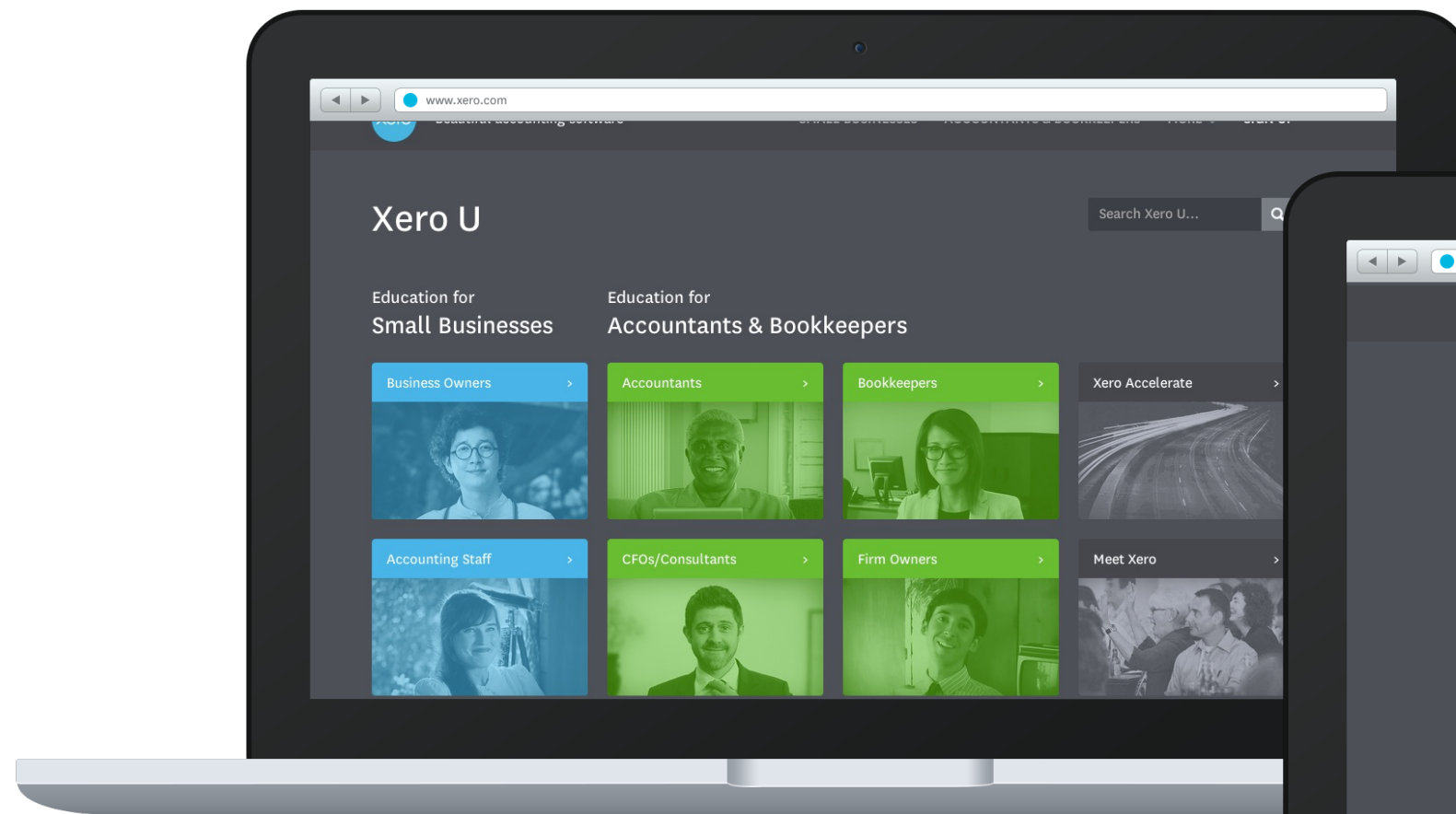
The education journey

Tell me about Xero

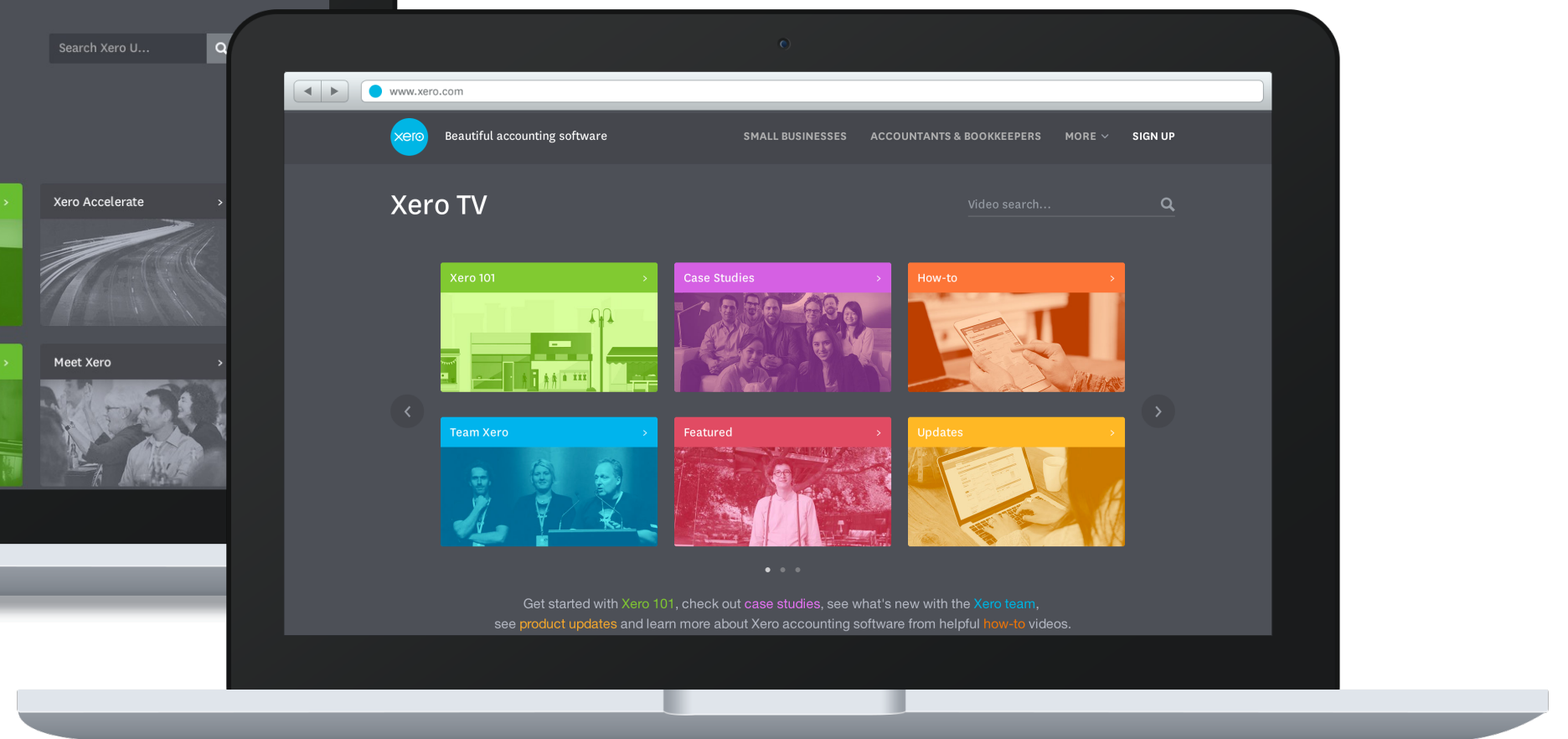
Train me on Xero

Grow my practice





[xero.com/training](https://www.xero.com/training)



[xero.com/tv](https://www.xero.com/tv)



Xero's Partner Enablement Tam

- Comprehensive resource to onboard first clients
- Short video tutorials for partners and small businesses
- Services include
 - Planning
 - Implementation
 - Shadowing
 - Optimization

QuickBooks conversion

Which:

- QuickBooks Windows (*versions 2007+*)
- QuickBooks Mac (*versions 2007+*)
- QuickBooks Online (*convert to Windows first*)
- **QuickBooks Enterprise** (*coming soon*)

What:

- Chart of accounts
- Company details
- Contact and items
- Fixed assets
- Invoices and bills
- Invoices & bill payments
- Bank spend & receive items
- Journals

How:



Email us to take
the first step

2



We'll ask for
some details

3



Upload your
QuickBooks file

Learn more at: www.xero.com/convert

Next steps

- Sign up for free Partner Program
- Get Certified

We make beautiful online accounting software for small businesses and their advisors

