



# Why Xero is right for your client



**To:** Your small business client  
**From:** Your practice  
**Subject line:** Let's make managing the books easier together with Xero!

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Hi [\[CLIENT'S NAME\]](#),

I hope this email finds you well! At [\[PRACTICE NAME\]](#), we're always looking for ways to help you simplify and improve your business operations. That's why we're excited to let you know we've noticed increased business activity and believe now is a fantastic opportunity for your business to switch to [Xero](#), a leading cloud-based accounting software that I believe could simplify your workflows and help take your business to the next level.

**Why Xero?**

Xero offers features designed to help make managing your finances easier and more efficiently, so you can focus on growing your business. Here are just a few of the key benefits of making the move:

- **Real-time insights:** Xero provides up-to-date financial information with easy-to-read dashboards, giving you complete visibility over your business' financial health.
- **Automated processes:** Streamline tasks like invoicing, payroll, and bank reconciliation, freeing up your time for more important things.
- **Collaboration made easy:** Xero's cloud-based platform allows the both of us to access your financial data from anywhere, at any time.
- **Security you can trust:** Your data is stored securely in the cloud with advanced encryption, keeping your business protected.
- **Customisable features:** Xero integrates seamlessly with over 1,000 apps through the Xero App Store, including inventory management, CRM, and more. Allowing us to tailor the platform to your needs.

## Email continued



To help you learn more about Xero, we've included some helpful resources:

- [Check out this guide](#) outlining the top benefits of using Xero for small businesses.
- [Watch this video](#) to see Xero in action and learn how it simplifies accounting for small businesses.

I believe Xero could be a game-changer for your business, and I'd love to chat about how we can get you set up. If you have any questions or want to take the next step, just let me know - I'm here to help!

Best regards,

[\[Your name\]](#)

[\[Your Practice name\]](#)

[\[Contact information\]](#)



# Help your clients get started on Xero



**To:** Your small business client

**From:** Your practice

**Subject line:** Let's make managing the books easier together with Xero!

Hi [\[CLIENTS NAME\]](#),

As we begin using Xero to manage [\[CLIENT BUSINESS NAME\]](#), I hope you're as excited as I am to work towards streamlining processes together and enhancing our collaboration!

To help you get acquainted with Xero and maximise its benefits, I have a set of resource links below.

These are designed to guide you through the setup process and familiarise you with Xero's features.

**Each resource is designed to equip you with the knowledge and skills to navigate through Xero effortlessly and help you make informed business decisions.**

To access these learning playlists, simply select the playlist you want to explore and log into Xero on the top right hand corner of your screen when redirected. Details of the playlists can be found below:

- **[Get started with Xero basics:](#)**
  - Here you'll find a series of quick videos that will help you learn how to efficiently set up your Xero organisation, input and manage customer sales, track supplier costs, reconcile bank accounts seamlessly and utilise Xero's tools to monitor and analyse your business performance.
- **[Set up bank reconciliation:](#)**
  - This Xero guide walks you through setting up bank reconciliation, which allows you to easily match transactions in Xero with your bank statements. It explains how to connect your bank account, import bank transactions, and ensure your financial records are accurate and up-to-date. It's essential for managing cash flow and keeping your books in order.

## Email continued



By investing some time in learning how to use Xero, you'll gain the ability to perform tasks independently. Which will not only save time but also enable us to collaborate more effectively, leaving space for us to work on helping you grow!

Thank you in advance for putting time aside to go through these resources and don't hesitate to reach out if you have any questions or require assistance.

Best regards,

[\[Your name\]](#)

[\[Your Practice name\]](#)

[\[Contact information\]](#)



# Help your clients get started on Xero



**To:** Your small business client  
**From:** Your practice  
**Subject line:** Levelling up on your day-to-day with Xero

Hi [\[CLIENTS NAME\]](#),

To keep the momentum going with your Xero set up, below are a few more features that I believe will help you automate and streamline your day-to-day operations. Check them out and I'd love to chat more about how we can implement them today!

- **Bank Feeds**
  - Bank feeds let you automatically import transactions from your bank into Xero. This means you can reconcile your accounts daily, giving you real-time insight into your cash flow. Check out [this Xero Central learning article](#) about bank feeds.
- **Online invoicing**
  - Xero's invoicing allows you to create and send professional invoices online, track payments, and set up automatic reminders for overdue invoices—helping you get paid faster. Learn more [here](#).
- **Online payments**
  - With Xero, you can accept payments from your customers directly through your Xero invoices using payment services like Stripe, GoCardless, or PayPal. This helps speed up payment collection and improves your cash flow. To learn more about the power of online payments you can learn more [here](#).

We understand that learning new software can feel overwhelming, but we're here to help with any questions or if you need guidance setting things up.

We look forward to helping you get the most out of Xero.

Best regards,

[\[Your name\]](#)

[\[Your Practice name\]](#)

[\[Contact information\]](#)