



# Talking practice efficiency with Kreston Reeves

“Xero empowers Kreston Reeves  
to offer clients more”

Xero for your practice



# Introduction: Kreston Reeves



**Dayle Rodriguez**  
Manager  
Kreston Reeves

**Kreston Reeves guide their clients, colleagues and communities to a brighter future – it's their purpose and passion.**

In a continually evolving world they help businesses, not for profit organisations, individuals and families embrace change through trusted advice, support and guidance. Their dedication to providing a personal service is what sets them apart – they get to know their clients, understanding their goals, supporting and advising them on their journey to help them realise their ambitions.

They are B Corp certified, demonstrating their commitment to their environmental, social and governance programme which is central to their purpose and vision as a firm. They have offices across London, Kent and Sussex and global reach through Kreston Global, an international advisory and accountancy network.

Dayle Rodriguez joined Kreston Reeves as Systems Advisory Manager in 2021, coming from a background in web development and IT consulting. *"I noticed there was an opportunity within the accounting space to deliver more advisory work, specifically around apps and going beyond the finance function,"* he says.

# Improving efficiency with Xero

Kreston Reeves first started using [Xero's cloud accounting software](#) in their practice in 2012.

A main driver for the change was to cut down on manual processes, freeing up more time to spend advising their clients and helping them to grow their businesses. *"More clients want more bang for their buck now,"* says Dayle.

Improving efficiency was also vital so that they could continue serving their smaller clients, who only require compliance services. *"We had to draw a line in the sand and say, it's fine if you don't want advisory services, but the only way we can continue to deliver for you is if we have fewer manual processes in place. It was a conversation we had with many clients, from one business owner to another, because we also have to look at our profitability and margins."*

Previously the firm experimented with other software but weren't happy with what it offered. *"Unfortunately it didn't innovate as much as Xero,"* says Dayle. Another reason Xero appealed was the support on offer.

**"Our Xero partner consultants, Dan Marshall and Kelly O'Leary, have really helped humanise the experience for our team internally,"**

*"I think that's one of the biggest things a software vendor can do, to come into a business and actually get to know people. To make sure they understand the day-to-day, not just the financial metrics."*



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**We find having everything in one place in Xero, from the books to the working papers, makes it much easier.**”

**Kreston Reeves uses many Xero tools in their practice, including [Hubdoc](#) (data capture software) and [bank feeds](#). “Everyone knows the bank feeds are amazing,” says Dayle.**

For compliance, the firm uses [Xero Tax](#), the end-to-end tax and accounts production software. “We find having everything in one place in Xero, from the books to the working papers, makes it much easier,” says Dayle. “We’ve got seven different offices, and having that uniformity makes things simpler. We can have someone in the London office and someone in the Brighton office working on one set of accounts. It means that we can share the workload and work better and faster. That’s been a massive help.”

The time savings made by automating routine tasks have also freed up more space in the calendar for face-to-face meetings with clients.

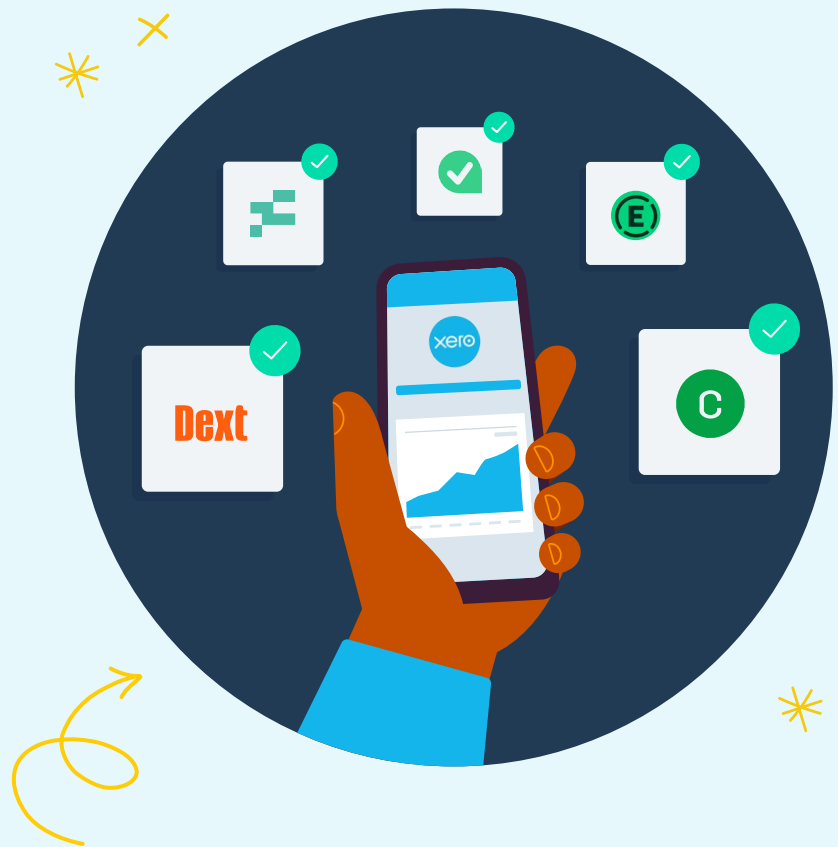
“We’ve actually increased the number of meetings we’ve had in the last two years,” says Dayle. “You can’t do the advisory work unless you have efficiencies in the compliance and data capture work, it’s not physically possible.” As a result, customer satisfaction is up. “We’ve seen a reduction in clients leaving, which is great.”

**Improved efficiencies mean the firm can also deliver accounts closer to the year end.**

“One of my colleagues delivered a set of accounts within ten days of the year end, for a limited company with at least a million-pound turnover,” says Dayle. “That’s because with the efficiency of Xero, we already had everything in place to do the accounts.”

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**From my perspective, a high-performing practice is one that has clients that trust the team implicitly to advise on all aspects of their finance, especially fintech. ”**



# Helping clients to embrace technology

To make the most of Xero, the practice integrates it with other software and apps, including [Dext](#), for data extraction and insights; [Fathom](#), for reporting and analytics; [ApprovalMax](#), for approval automation; [Expensify](#), for expense management; and [Capitalise](#), for credit funding.

These extra tools from Xero's app ecosystem have allowed Kreston Reeves to expand their advisory offering to clients and offer more value. "With Fathom, we now make it a standard report package, so we'll get the figures out of Xero and put them into Fathom," says Dayle. "It's actually helped us win more business advisory work. Some of our clients that want compliance only, we've given them a taster of a Fathom report, and they've gone: that's really cool, can I get that again next quarter?"



The firm thoroughly vets any new app before adding it into its tech stack to make sure it's the best available option for the practice. "We ask everyone in the firm, from juniors to partners, what do you need in a system?" says Dayle. "We then score the product according to that."

This due diligence isn't just for the benefit of Kreston Reeves. It also means staff can confidently recommend the tech to their clients.

**"We want to make systems advisory a core service for all of our clients," says Dayle. "Our vetting system means anyone in the firm can say: we use the product for this and it works, trust us, and here's the evidence to back it up."**

Reviewing their technology is an ongoing process. "We have a digital heroes team who have time allocated within their month to look at these systems and provide that review process, and every two to five years we do a hard review of the apps," says Dayle. "That doesn't necessarily mean we will change providers, but it allows us to confidently say to people that we've looked at it, we've measured it, and this is what is best."

Building this trust is important, as some clients can be initially resistant to an accountant advising them to use a particular product. "From my perspective, a high-performing practice is one that has clients that trust the team implicitly to advise on all aspects of their finance, especially fintech," says Dayle.



# Building a happier workforce

The benefits that technology bring to the firm aren't just about profitability and metrics but extend to staff wellbeing too. *"Every year we do staff feedback forums and we've seen that people are happier,"* says Dayle. *"They're under less time pressure to do things and to deliver work, which means they feel better in and of themselves."*

Staff satisfaction is important not just for current employees but in attracting and retaining the next generation of talent. *"If you look at the timesheets of some of our younger juniors who are still training, more and more of their time is spent on systems and advisory work, rather than the more traditional accounting work."*

**"Another thing that the technology has allowed us to do is to hire more people like me, from a non-accounting background, who maybe have a different perspective on how to work and consult with clients to deliver a service that is more robust and sticky."**

The accountancy industry is evolving fast but, as they have for 200 years, Kreston Reeves is embracing change and proving that the right technology can make life easier and more rewarding, for practices and clients alike.







**Find out how Xero's integrated software,  
innovative practice tools, thriving community,  
and on hand accounting experts help increase  
efficiency so you can do more**

