What makes a high performing practice?

Top takeaways from these sessions

1. **Xero Tax** is our solution for accounts production and corporate tax, as well as personal tax. Over the last year, we've made lots of enhancements to help you serve even more clients.

✓ We've added new functionality to company accounts and tax adding such as split accounts, simple rounding, non trade capital allowances, manually marked as filed, CT600L (RDEC), and an improved company info page.

✓ For personal tax, we now support all the boxes for SA106 (Foreign Income) and SA107 (Trusts). You can also import HMRC data reports for clients, download a report to show all schedule entries, use the state pension age calculation, and benefit from a tighter integration with core Xero.

✓ Plus we are rolling out the brand new tax manager feature, which is a single place to view your tax obligations for company accounts and tax, personal tax and VAT, rather than jumping across 3 different dashboards - so you can easily see the work to prioritise first.

2. **Xero Practice Manager** (XPM) is our solution for managing client jobs, practice workflows, time tracking and invoicing.

✓ XPM has improved its features such as job manager, staff management and reusable contacts. But the biggest thing we've been working on over the last 8 months or so is the single client record across Xero HQ and XPM. A single client record helps practices like yours save time with no double handling of data. It also means that you and your team will have more confidence in the accuracy of data across Xero practice tools.

✓ There's much more to come with lots of investment in XPM. In the meantime we can support you with different implementation options based on your needs, ranging from self-paced to completely managed for you.

3. The revamped **Xero App Store** makes it easy to discover the right apps that will help enhance the value of your practice, and level up your advisory skills.

✓ New features like the Advisor Led Recommendations make it even easier to use apps with your clients. Simply select a range of recommended apps to appear in your clients' Xero account and you're on your way to better collaboration and more shared insights.

4. **Generative AI** now available in Xero Help Centre to give you bespoke answers to your queries.

✓ Generative AI means you no longer need to sift through lists of search results, select the right answer, and work through a series of steps to find the solution. Instead, you will receive direct and customised responses to your inquiries.

Key things to do back at the office

1 Xero Tax is available to all Xero partners, at no extra cost. If you've tested Xero Tax and you're ready to take the next step, our Partner Consulting team is available to help you plan the next phase of your Xero Tax journey and support you with data migration. **Book a session now!**

2 XPM is free to all partners on Silver status and above. **Check out our implementation options page** to get started or touch base with your Account Manager if you need help deciding which option is best suited for you.

3 There's much more to come with lots of investment in XPM and to be first to sign up to test new experiences you can **join the early access programme**.

4 **Visit the Xero App Store** to find the right apps for you and your clients or speak to your Account Manager for any questions relating to Xero and apps.