



How to build your own event

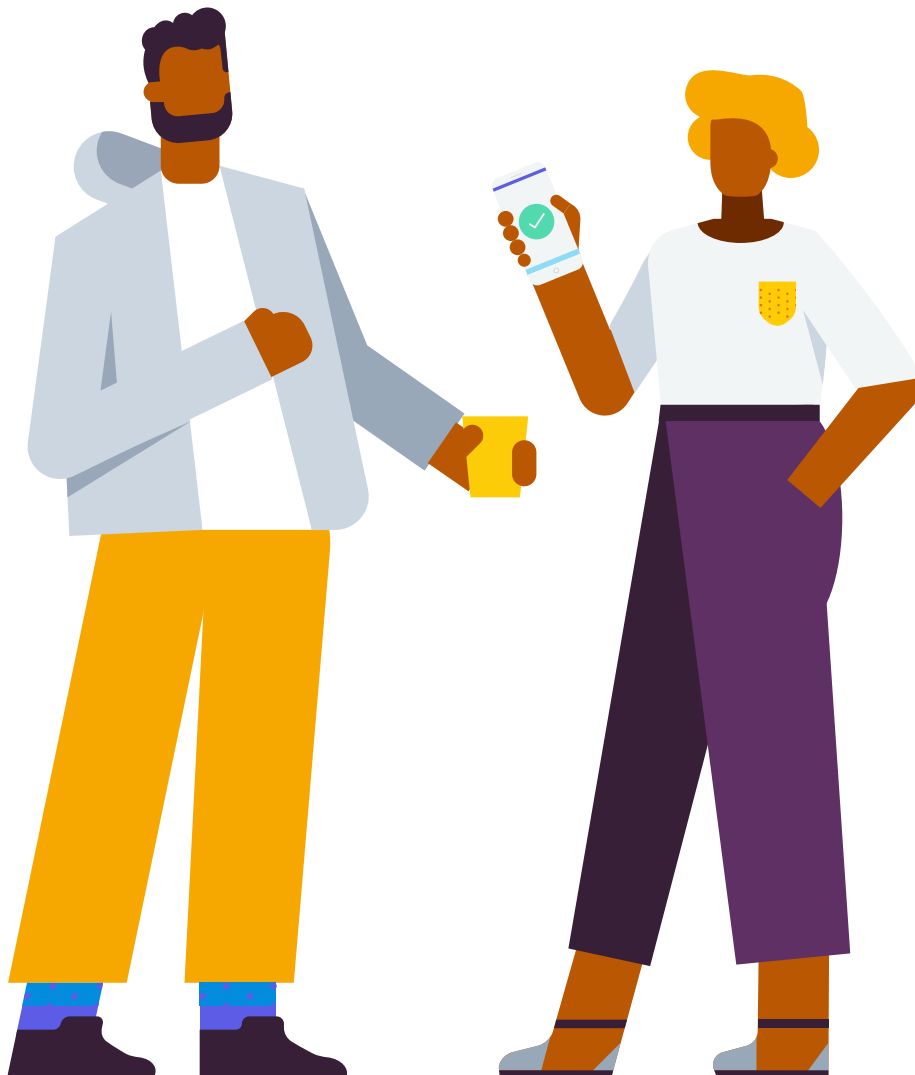
All you need to know about showing your
clients how to get the very best from Xero.

Beautiful business

xero

The benefits of running your own event

Events are a great way to build stronger relationships with clients and help to educate them en masse about topics that affect them, such as new features – or getting paid faster. Whether it's run online or in person, events are a great way to expand your reach and connect with both current and potential customers.



This guide includes some of the resources you need to host your own Xero event. We hope to help make the planning and execution of your event as easy as possible.

Planning the perfect event



Pick the right date, time and format

Events can be run online or face to face. There's a number of factors to consider when deciding which approach will work best - including event size, budget, timeline, and the geography of your attendees.

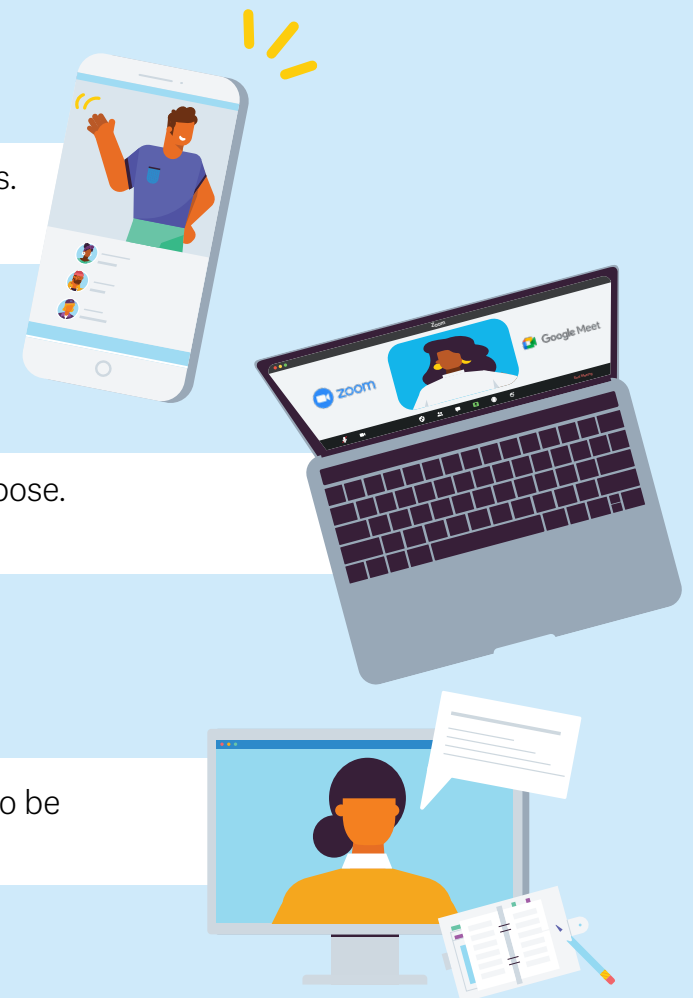
Virtual events can often be deployed quickly at a reduced cost and can certainly be advantageous if you are trying to reach clients who are spread far and wide. However, face to face events add that other dimension to your event and can be great for networking.

Broad categories of virtual events

Live streams: Best for a shorter event when you want to engage quickly with your customers. Take advantage of social media platforms. This is a low interaction option.

Virtual workshops, discussion groups and meetings: Choose software made for this purpose. At Xero we use Zoom, however there are free options available, e.g. Google Meet.

Webinars: Best for presentations or demos. This requires software that enables customers to be able to ask questions. Choose a platform that lets you record the session.



Top tips for planning a virtual event

Your environment is important. Clients are more likely to be engaged and focused if you get the simple things right and ensure a pleasant viewing experience.

Key things to consider:

1

Find a place that's quiet. Think about the background noise we normally tune out.



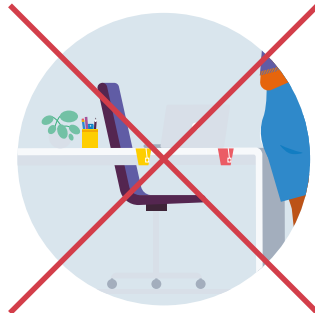
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Don't sit with your back to a window. No one will be able to see you, and the sound will bounce back at your microphone.



3

Clean up the space behind you. It doesn't have to be perfect but make sure it's professional.



4

Natural sunlight is great. Or, make sure you direct lighting towards your face.



5

Sit about 1m away from your webcam so participants can see your hand gestures.



Make technology your friend. Your clients will appreciate an event that runs smoothly with limited hiccups and having confidence in your tech will allow you to focus on delivering quality content.

Key things to consider:

1

Consider having a separate “tech” host who can run the logistics in the background.



2

Have a dedicated co-host who can answer any questions in the chat or notify you if a good question has come through that you can answer for everyone.



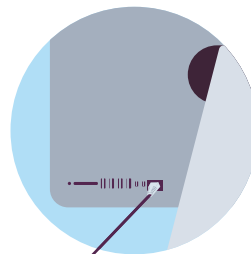
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Good headphones allow participants to hear you clearly.



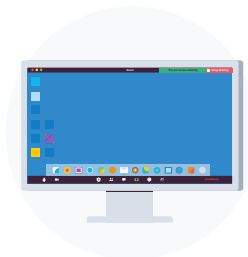
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Plug into your internet network via a cable if possible, as WIFI is not always reliable.



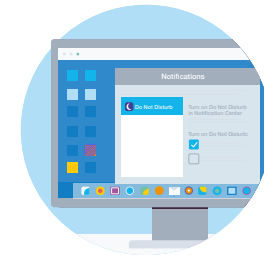
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When sharing your screen, clean up your desktop and hide the bookmark bar in your internet browser.



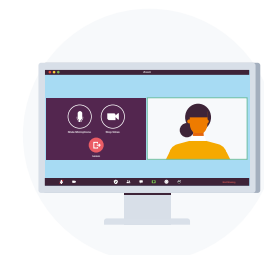
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Put your computer in do not disturb mode and close any applications you don't need.



7

Test your audio and video before the event. Get a colleague to log in ahead of time to listen in and let you know if there are any issues.

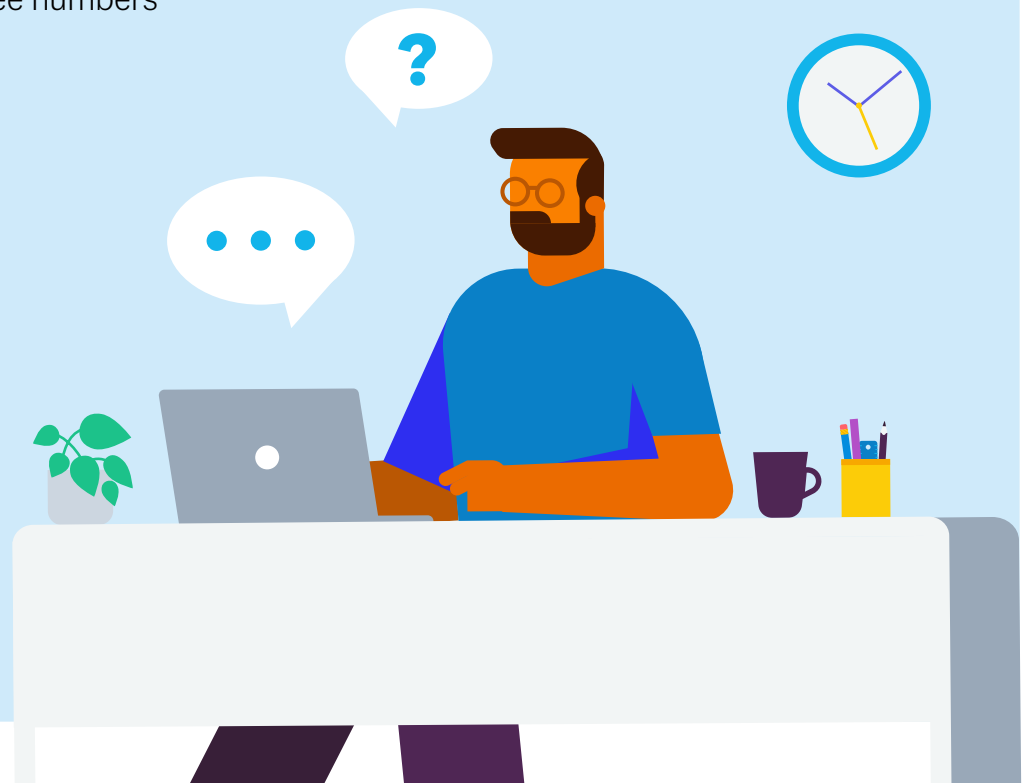


Face to face events

Your clients are busy and more likely to attend an event that's easy to get to and fits with their schedule. Set yourself up for success by picking a venue and time that works for them.

Key things to consider:

1. The middle of the week, and before or after work, are the best times for most people.
2. Pick somewhere central and easy to access. Look for good parking and public transport options.
3. Your office might work if it's in a central location, otherwise a cafe, bar or hotel conference room will create a friendly, casual atmosphere – just make sure you can be heard.
4. Make sure your venue has:
 - Minimum and maximum capacities that suit your target attendee numbers
 - Catering facilities
 - Tables and chairs for your guests to sit at during the event
 - AV connectivity capabilities
5. Make a list of anything you need to hire, the cost, and how you will get it there on the day:
 - AV equipment e.g. projector, screen, mics and plenty of charging spots
 - Staff to help with event registration and welcoming your guests



Visualise your event, venue and catering

Consider the flow of your event and set up the venue and catering to reflect the timing, audience and your overall vision.



- 1.** Visit the venue to get a first-hand look at what your guests will experience.
- 2.** Consider your layout. We suggest theatre style with a small stage area at the front where you can present.
- 3.** Ask if there are any venue quirks, things you need to hire, and who from the venue will be on hand to help on the day.
- 4.** Make sure you're clear on what's provided in the cost, and how long you have the venue for.
- 5.** We suggest allowing some time for drinks and mingling after the event. Make sure the room you use has space for this.
- 6.** If it's a morning event, a light breakfast and coffee works a treat on arrival.
- 7.** Check the temperature and sound in the room. Music is a welcome addition if guests are mingling.

Involving your clients

We recommend hosting between 10 and 30 guests.

This can be more intimate, allowing guests to feel confident in asking questions to learn more.



Choosing your clients

The [presentation material](#) we have provided is perfect if you're looking to onboard new clients to Xero but it can also be adapted to cater for a wider audience if need be.

Look for clients who need help streamlining their accounting. If you're running an event focused on changes in legislation, look for clients most likely to be affected. If you're talking about getting set up and time-saving tips, find clients that are newest to Xero.

Once you have a list together, create your invitation. Use our invitation templates and email banners [here](#) or you could create your own. Your invite should tell your clients everything they need to know and of course, look beautiful too.

Tracking registrations

Online event tools like [Eventbrite](#) are useful for tracking registrations. And most are free as long as you're not charging for tickets.

Create a winning invite

Once you have your list of prospects to invite – create your invitation. Use our invitation templates and email banners [here](#), or you could create your own.

New Message

If you're creating your own invitation, remember to keep it simple.

Send them by email and make sure you capture all the relevant details at registration:

- ☒ The purpose of the event and why they'd benefit from coming
- ☒ The day, date, time and location
- ☒ Details of speakers, catering, entertainment etc
- ☒ When RSVPs are due
- ☒ Tips on how to get there, such as the nearest public transport stop and where to park
- ☒ Whether they can bring a guest and to provide the guest's name in the RSVP



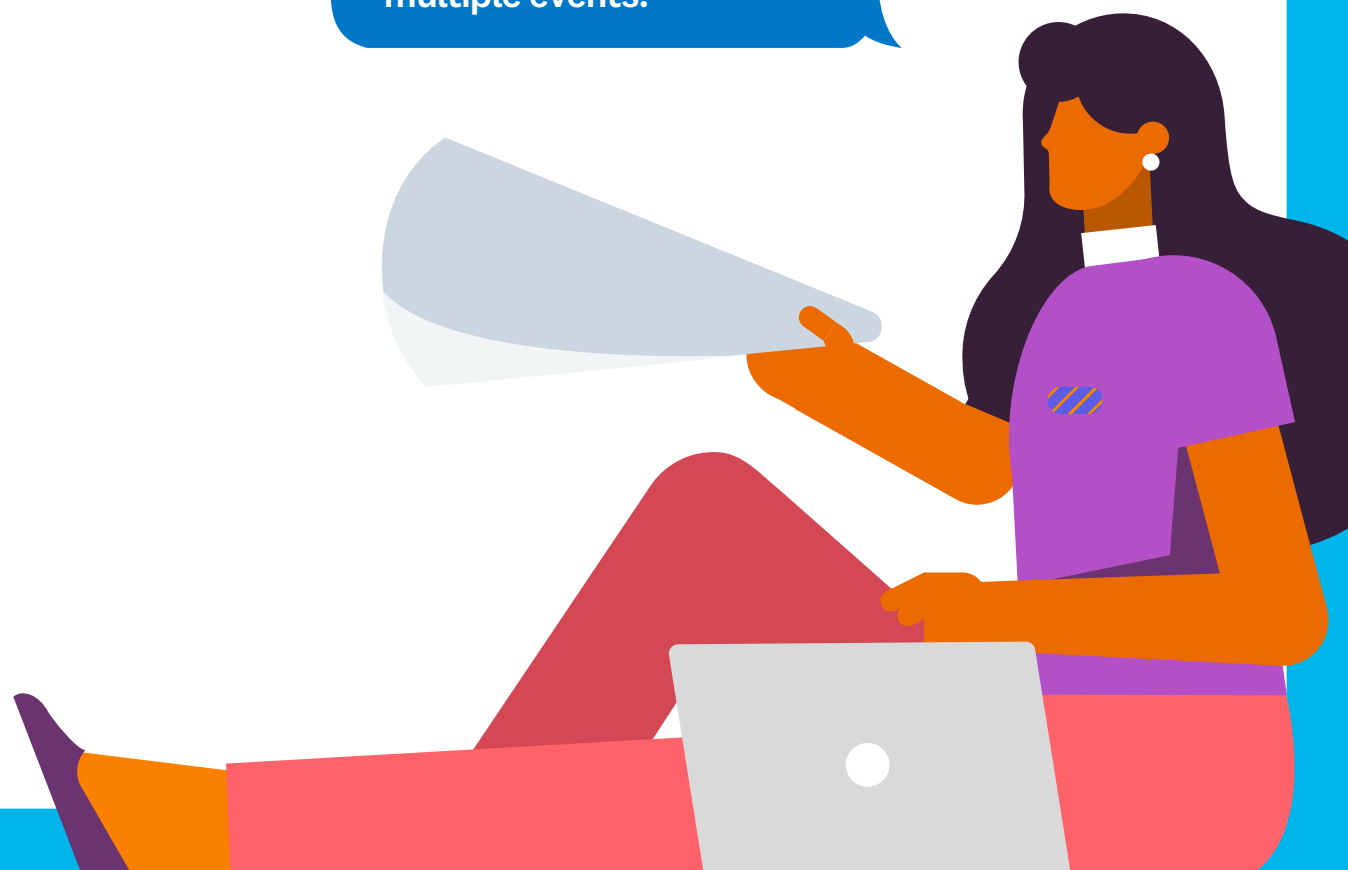
Promote your event

We've included some social tiles for you to use that can be downloaded from the Xero webpage. Using these is a great way to reach lots of people quickly and easily across a range of different channels.

You could also try:

- asking colleagues to share social tiles on their personal LinkedIn
- calling or emailing your current client and prospect lists
- an ad in the local newspaper or business magazine
- targeted Facebook ads (by location, industry etc.)
- inviting current clients to bring a friend
- providing an incentive to refer another business
- flyer drops in local areas and to local businesses
- targeted digital display advertising

The more people who are engaged with the event the better. Depending on demand, you could host multiple events.

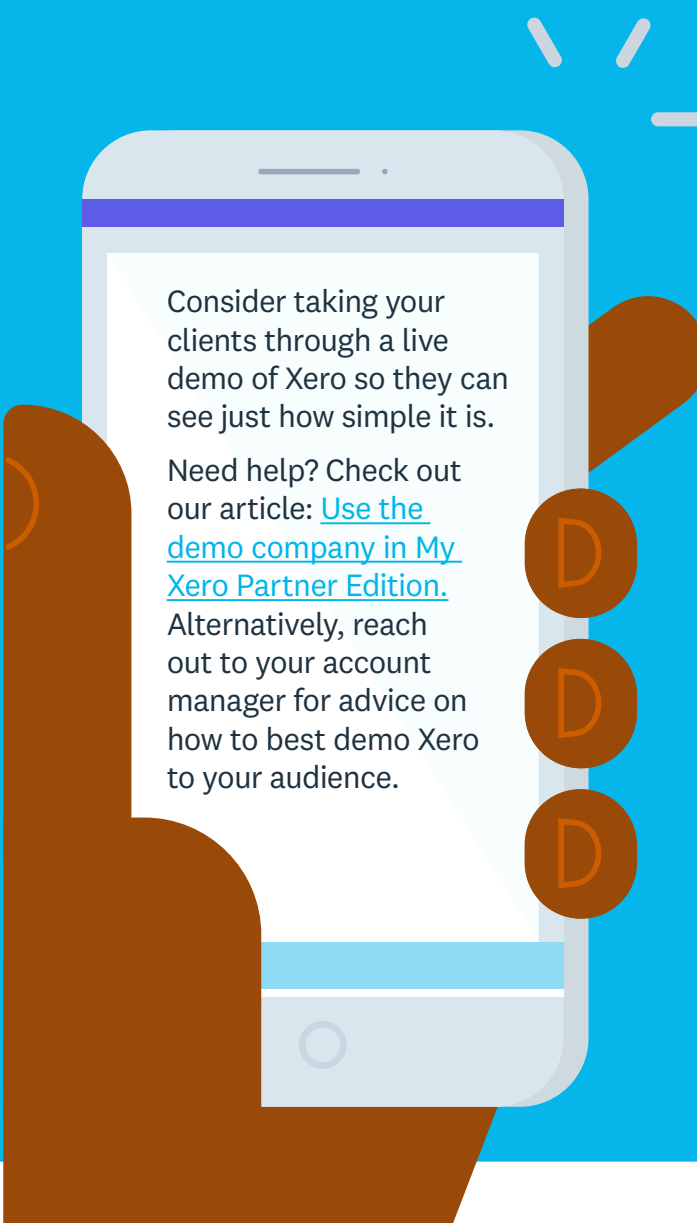


Presentation and content

Running a Xero presentation and demo is a great way to help your clients understand how online accounting software can really help them.

Highlight the key features and benefits that they'll love, such as:

- Unlimited users and everyday task management
- Save time with automatic bank feeds for easy bank reconciliation
- Get paid faster with online invoicing and payments
- Choose from more than 800 connected apps to meet their business needs
- See a real-time view of your finances to enable up-to-date advice
- View the same data as your advisor from anywhere at anytime



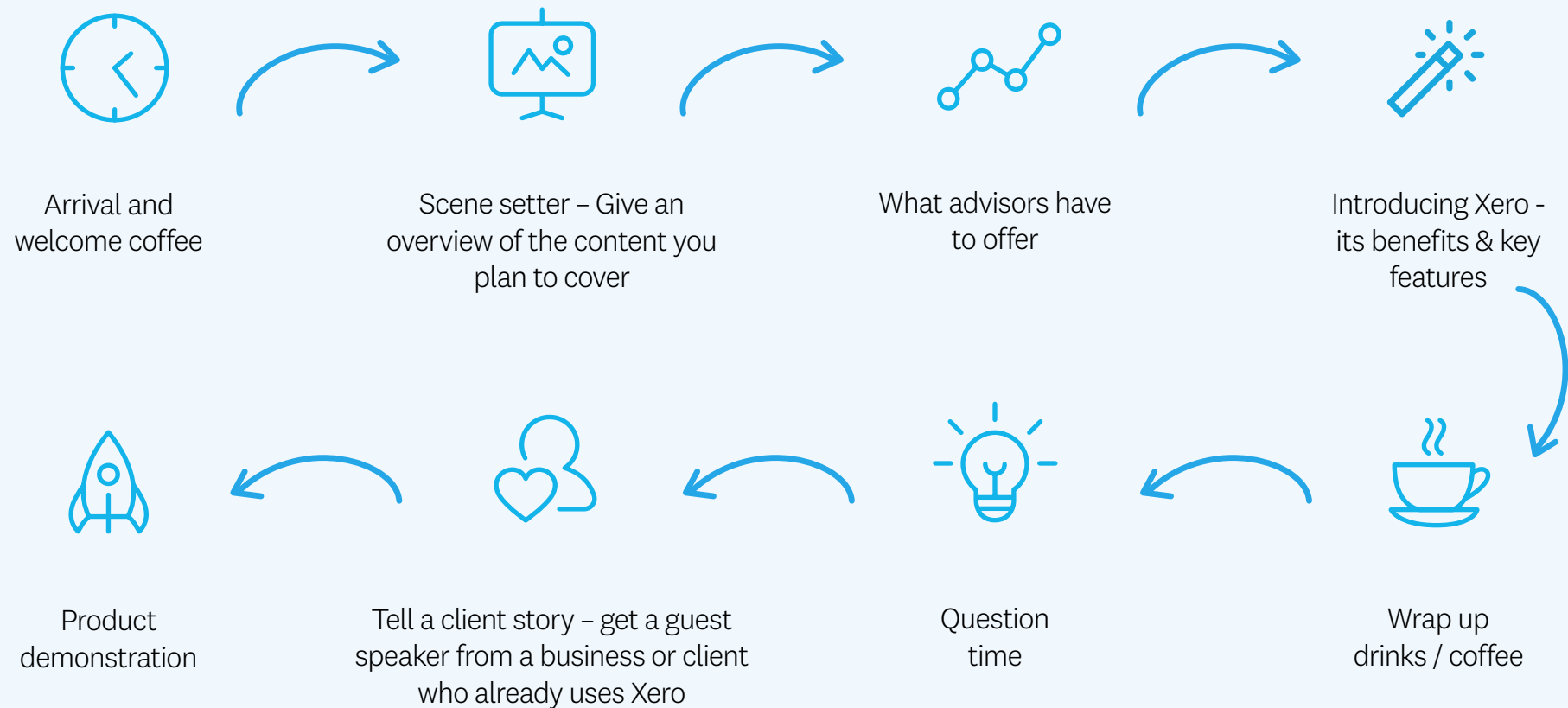
Consider taking your clients through a live demo of Xero so they can see just how simple it is.

Need help? Check out our article: [Use the demo company in My Xero Partner Edition.](#)

Alternatively, reach out to your account manager for advice on how to best demo Xero to your audience.

Suggested event agenda

Online events should ideally be kept to under 1 hour. If face to face, we recommend including a welcome coffee and wrap up drinks etc.

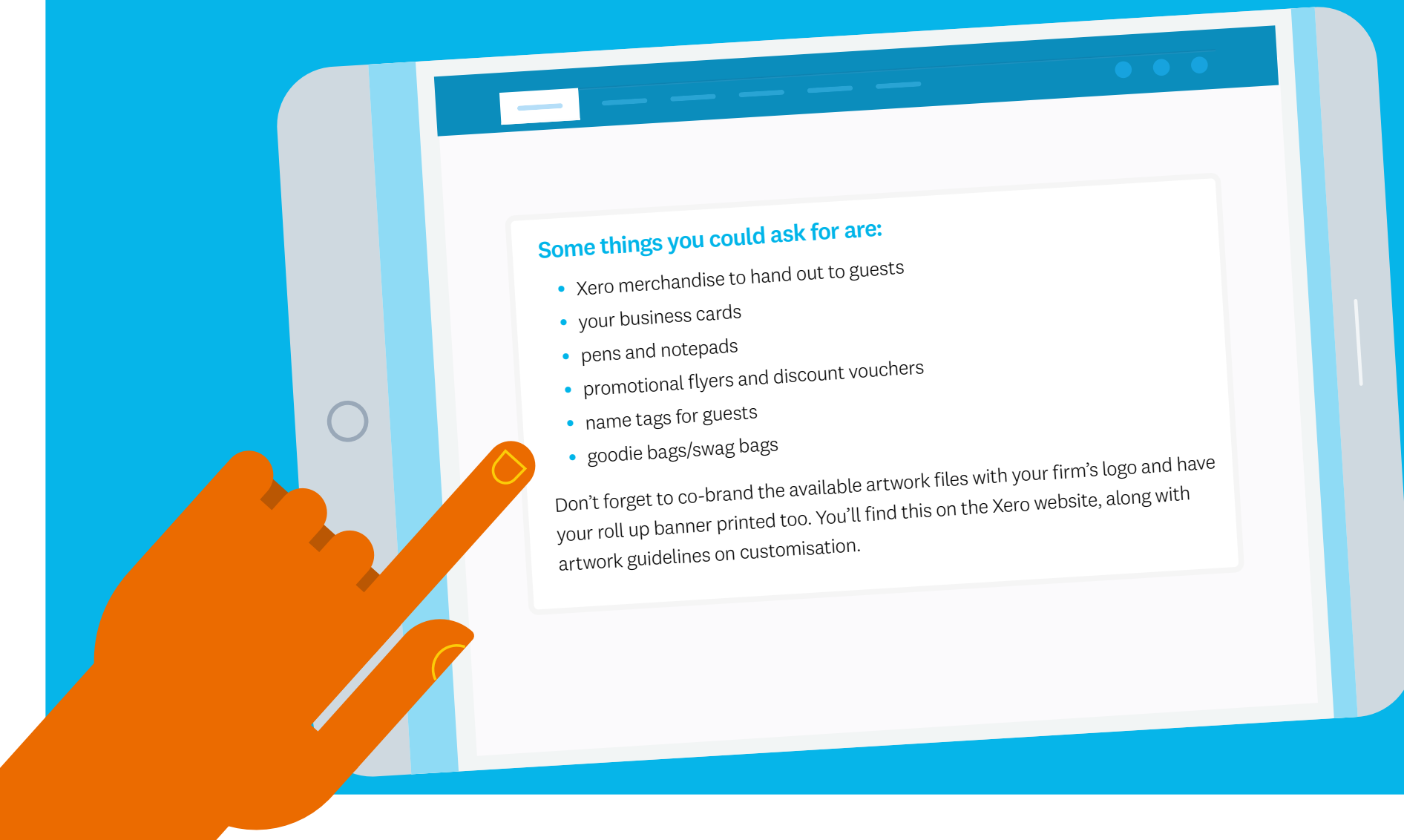


Include collateral

Showcase Xero and your business with professionally designed marketing collateral and merchandise.

We've included some great pieces in the toolkit. Why not print these out to give to your guests as a reminder of your event? If your event is online, make sure you email any materials to attendees immediately after the event.

Make sure you talk to your account manager for access to partner-only items.



Do a test run

We've added bullet points in the speaker notes of the presentation to help guide and structure your presentation effectively. Ensure everything goes to plan by practicing before the big day. This will help you feel confident, identify any issues, and give a good sense of how long things will run.

Make sure you:

- ✓ practice your presentation and ask for honest feedback
- ✓ know what materials and equipment you need and check that everything works
- ✓ make a note of how long everything should take
- ✓ make sure you have pens and a system in place to collect registrations and book follow-up appointments
- ✓ make a plan for early and late arrivers
- ✓ confirm speakers, helpers etc.

Tech tips

- ✓ Do a test run before the real deal – it'll help iron out glitches
- ✓ If giving a demo on a computer, hardwire the internet rather than relying on WiFi – if you have to be on WiFi, try a connection that is only being used by you
- ✓ Save the WiFi password and pop a copy of your presentation on your desktop
- ✓ Keep a copy of your presentation on the desktop of your computer to protect against potential WiFi issues





**At your
event**

Virtual events

The magic word: Engagement

Most often people won't remember all the information you shared with them, however they'll remember how you made them feel and how they felt when they finished the experience.

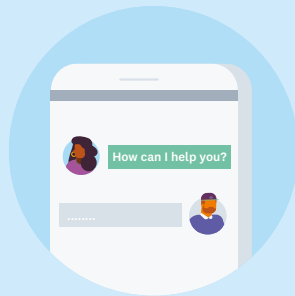
1

Greet participants by name (for a smallish group).



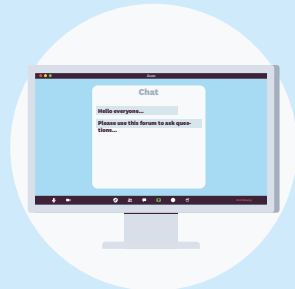
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Kick start your session with interaction, like a poll or question, to get them participating from the beginning.



3

Give clear instructions on how you want participants to ask questions. E.g. using a chat feature, or on microphone.



4

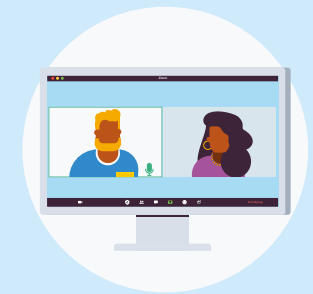
Use state changes. This is anything that helps participants maintain concentration by using visual or audio cues:

- a** A scheduled break
- b** Playing a video
- c** A poll or trivia question
- d** Moving from slides to a demo or vice versa
- e** Change in the tone of your voice
- f** Change of body language
- g** Mentioning a participants name



5

Watch for clues that someone wants to join the conversation, e.g. taking their microphone off mute.



6

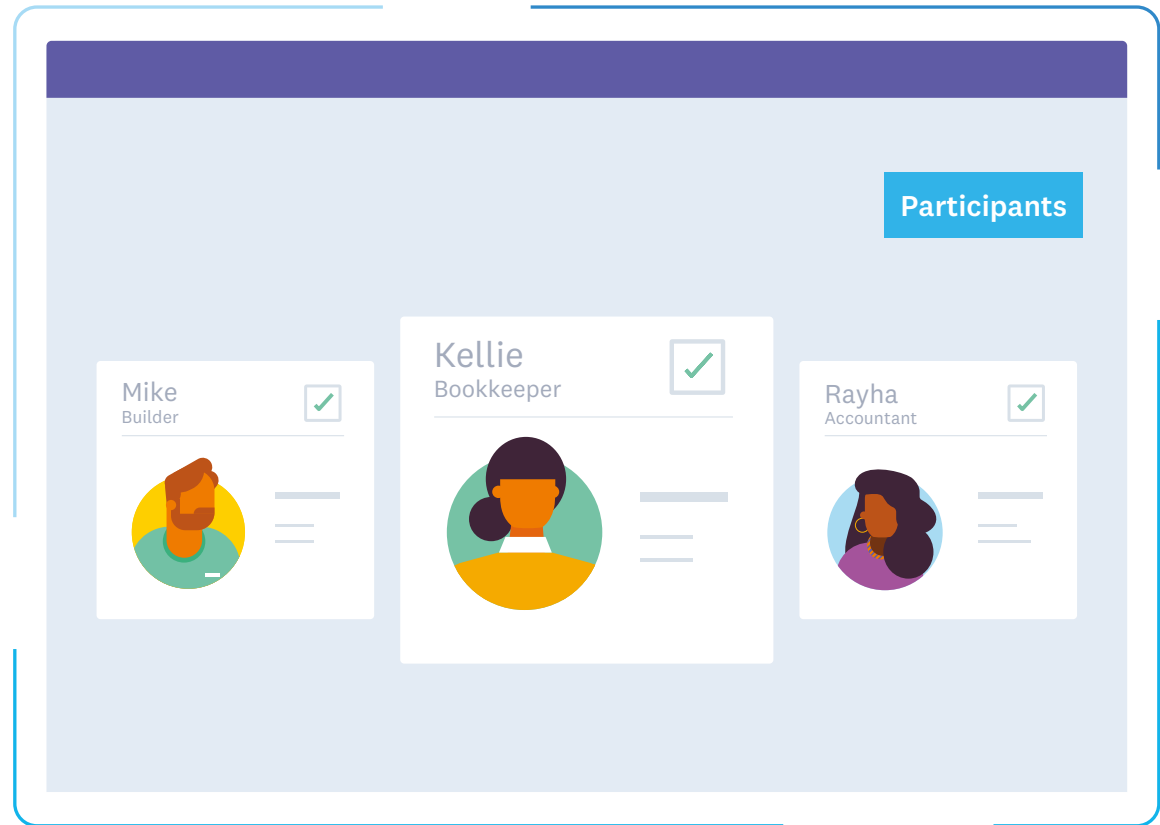
Watch out for people whose mouths are moving but you can't hear anything. They want to speak but have forgotten to take themselves off mute!



Handling lack of interaction:

Questions to the group may not get a response right away. That's okay. Here are a few tips to help you get the conversation going.

1. Wait 4 seconds. You'll find that someone usually jumps in.
2. Use breakout rooms liberally, if the software allows. Breaking a larger group into smaller ones will encourage conversations, especially with participants who aren't as comfortable sharing. Have the group introduce themselves when they head into the breakout room.
3. Change your language from "does anyone have any questions about that" to "what questions do you have for me?". You'll be amazed at the difference it makes.
4. Call attendees out by name and ask for their thoughts on an area you know they're a subject matter expert in.
5. Use interactive tools, like polls, to kick start the conversation.



Post event



Keep the momentum going

You'll want to make sure you leave your clients with a call to action. What do they need to do next? How are you going to follow up? Let them know you'll be in touch to get them transitioned to Xero, or ask them to contact you at a time that suits them. Have a schedule available so they can choose a time to book in with you then and there.

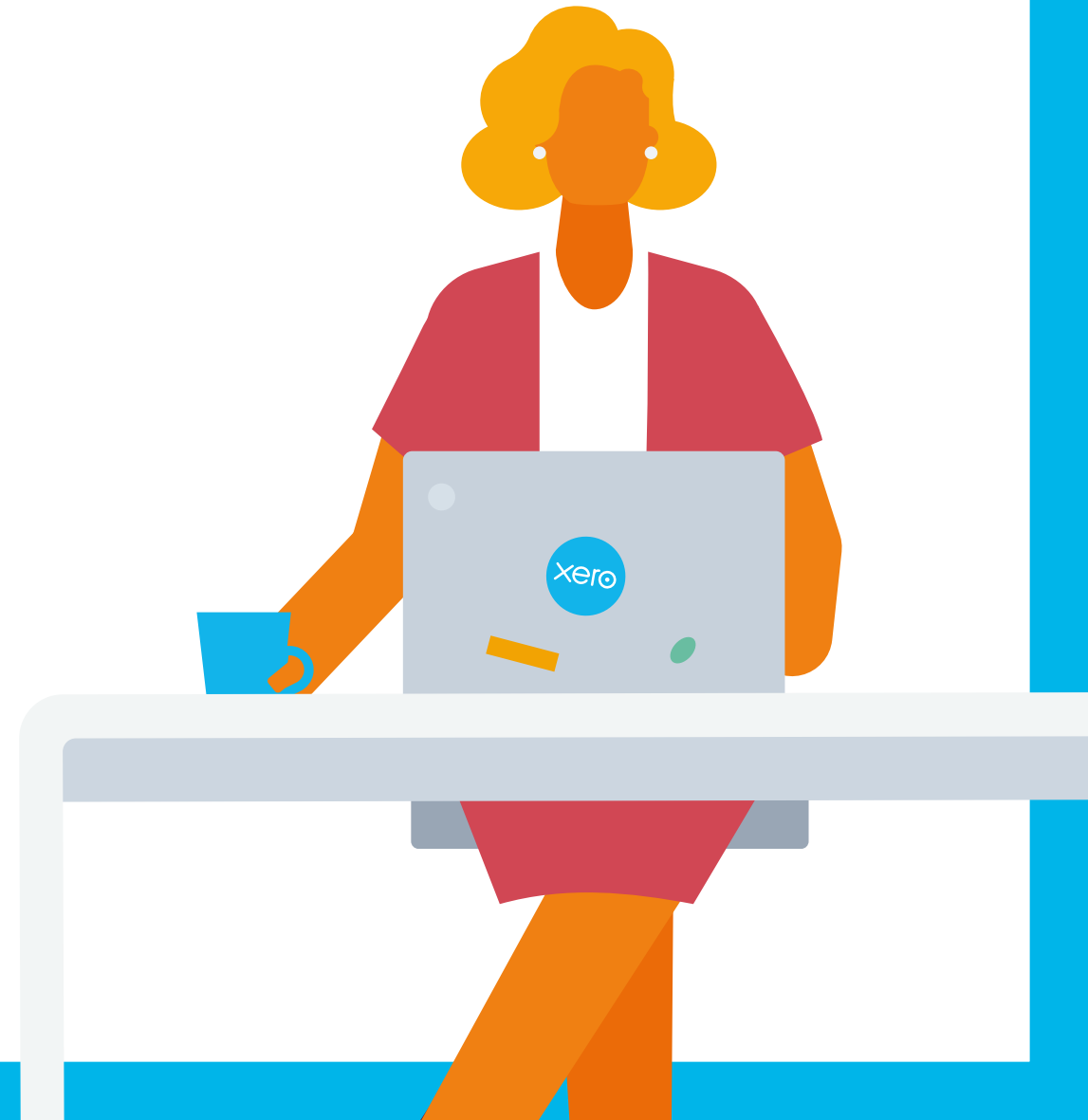
Follow up and convert

Whether they turned up or not, people who've shown interest in your event are great prospects.

Be sure to:

- ☒ send your 'thank you' email to all attendees
- ☒ follow up individual conversations, aiming to lock in meetings to discuss next steps
- ☒ share a summary of your key talking points
- ☒ provide useful information and resources in response to any questions from the day
- ☒ send 'no-shows' a note to let them know they were missed and share any helpful information
- ☒ summarise any feedback you received and let guests know how you'll action it
- ☒ remind clients and prospects of the benefits of Xero and how to set up their free trial
- ☒ summarise all the different ways you can help them grow your business
- ☒ make everyone feel welcome to contact you anytime

Enjoy your event.



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