

Make the most of your marketing with Xero

Your Xero Partner Marketing Guide





Welcome

Our aim is to help you grow your business by attracting new Xero clients, and providing even more value for your existing clients.

The partner marketing fund is here to support you with tools, resources and cooperative marketing funds to help promote your practice and execute great marketing.

This guide outlines the eligibility criteria, types of marketing activities that we can fund, and how to apply to use the funds.

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John Delalio, Xero-certified advisor

How to access the fund

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1 Are you a certified bronze, silver, gold or platinum Xero partner?

YES

Read through these guidelines and follow the steps to access the fund

NO

[Learn about the Xero partner program](#)

[Become a Xero partner](#)

2 Apply for funding

Before starting your marketing activity, email us with the details of your proposed activity. Share any drafts, provide an estimated budget, and lay out your goals. We'll review your proposal and be in touch within five business days.

For Canada, please email: ca.marketingfund@xero.com

For US, please email: amer.marketingfund@xero.com

To be eligible for reimbursement, your marketing activity must comply with this [Partner Marketing Fund Guide](#) and the [Xero partner brand guidelines](#).

3 Get approved and start marketing

After you receive pre-approval from Xero, you're ready to begin your marketing activity.

As you progress, please share drafts of your ads or other materials with us for review to ensure they meet our guidelines prior to running your campaign.

Be sure to include your Xero partner badge and highlight the benefits of using Xero!

How to access the fund *continued...*

continue onto the next page...

4 Get reimbursed

Once your marketing activity is complete, send us your supporting documents:

- ✓ Marketing activity details (links, photos or screenshots of your completed marketing activity)
- ✓ Your paid vendor invoices
- ✓ An invoice billing Xero for 50% of the marketing activity up to a maximum of \$2,000*

*Payment terms are Net30. Canadian partners are paid in CAD and US partners paid in USD. It is at your discretion to include or exclude tax provided the amount requested does not exceed the \$2,000 limit.

Please email the supporting documents to:

- Canada: ca.marketingfund@xero.com
- US: amer.marketingfund@xero.com

Reminder! Don't forget to include our full mailing address on your invoice to Xero:

Canada

On your invoice to Xero, please bill it to the following address:

Xero Software (Canada) Ltd
111 Richmond St. W.,
Suite No. 501, Toronto ON

United States

On your invoice to Xero, please bill it to the following address:

Xero Inc.
1615 Platte Street
Denver, CO 80202

How to access the fund *continued...*

5 Woohoo — money in the bank!

Congratulations on your successful marketing campaign!

After your reimbursement has been processed, it may take up to 30 days for payment to be received.

If you are a first-time applicant: You'll receive an email with a quick and easy vendor onboarding application from OneTrust. Please note that completing this process can take up to 10 working days, which may delay reimbursement.

Key requirements and deadlines:

- ✓ Include a Xero partner badge and highlight the benefits of using Xero in your marketing activity.*
- ✓ Complete your marketing activity within the current fiscal year, which runs from **April 1 to March 31**.
- ✓ Submit all supporting documentation, including invoices and receipts, to Xero by **March 1** of the same fiscal year. Please note that rollover funds are not allowed, so all invoices must be submitted by this deadline to be eligible for the current fiscal year.

*Note that the Xero logo may not be used by itself.

Using the partner marketing fund

continue onto the next page...

To ensure that you get the most out of our guide, we encourage you to read it in full and to review our Xero partner brand and logo guidelines carefully.

What activities can we help fund? In a word: lots!

Here are a few examples of what the co-op marketing fund will cover:

Advertising

Including digital, social, print (including industry publications) and mass media (radio and TV)

Content marketing

Such as blog posts, articles or infographics

Marketing collateral

Such as co-branded brochures

Swag

Such as co-branded shirts and water bottles

Website

Co-branded design and updates

Events

Where you can promote Xero

And so much more! [Check out the next section for approved marketing activities and get inspired.](#)

Using the partner marketing fund *continued...*

What's not covered

The following is not covered by the fund:

- Google Ads, search engine optimization (SEO) and search engine marketing (SEM)
- Generic branding or advertising that doesn't specifically reference Xero
- Ads that offer services not directly connected to Xero
- Anything that mentions or promotes other accounting software providers
- Accommodation and travel to and from events
- Business-as-usual items like stationery or work uniforms
- Sports branding, such as race cars, yachts and uniforms
- Sponsorship of local sports teams, athletes and events
- Sponsorship of charity initiatives or events
- Telemarketing or the purchase of prospect lists
- Online business directory listings
- Purchase of alcoholic beverages

Related documents

When you're doing any co-branded marketing activities, check out these resources:

- [Make the most of your marketing with Xero](#)
- [Xero partner toolkit](#)

We're here to help

If you can't find the answers you need here, please contact your Xero account manager or email:

- For Canada: ca.marketingfund@xero.com
- For US: amer.marketingfund@xero.com

Approved marketing activities

Advertising

Activity	We can help fund...	Your activity must...	We won't help fund...
Digital & social	<ul style="list-style-type: none"> targeted LinkedIn or Facebook advertising digital billboard advertising video production 	<ul style="list-style-type: none"> include a Xero partner badge promote Xero benefits 	<ul style="list-style-type: none"> Google Ads, search engine optimization (SEO) and search engine marketing (SEM) ads that mention other accounting software providers
Newspaper & magazine	<ul style="list-style-type: none"> local newspapers community newsletters or industry publications 	<ul style="list-style-type: none"> include a Xero partner badge include a call to action promote Xero benefits 	<ul style="list-style-type: none"> yellow or white pages business listings
Radio	<ul style="list-style-type: none"> all advertising 	<ul style="list-style-type: none"> include a call to action promote Xero benefits 	<ul style="list-style-type: none"> ads that mention other accounting software providers
TV	<ul style="list-style-type: none"> all advertising 	<ul style="list-style-type: none"> include a Xero partner badge include a call to action promote Xero benefits 	<ul style="list-style-type: none"> ads that mention other accounting software providers
Content marketing	<ul style="list-style-type: none"> content writing, production and placement costs 	<ul style="list-style-type: none"> include a Xero partner badge promote Xero benefits 	<ul style="list-style-type: none"> ads that mention other accounting software providers subscription costs
Website	<ul style="list-style-type: none"> design and build of a new website significant updates to current website 	<ul style="list-style-type: none"> include a Xero partner badge include a dedicated Xero landing page or dedicated content block promoting Xero include a call to action promote Xero benefits 	<ul style="list-style-type: none"> a website that doesn't include a dedicated Xero landing page or a dedicated content block promoting Xero

Marketing collateral

Activity	We can help fund...	Your activity must...	We won't help fund...
Flyers	<ul style="list-style-type: none"> co-branded flyers, brochures, postcards and handouts promoting your services and Xero 	<ul style="list-style-type: none"> include a Xero partner badge promote Xero benefits 	<ul style="list-style-type: none"> any collateral that mentions other accounting software providers
Business cards	<ul style="list-style-type: none"> local newspapers community newsletters or industry publications 	<ul style="list-style-type: none"> include a Xero partner badge include a call to action promote Xero benefits 	<ul style="list-style-type: none"> yellow or white pages business listings

Events

Activity	We can help fund...	Your activity must...	We won't help fund...
New client events	<ul style="list-style-type: none"> event promotion and event costs 	<ul style="list-style-type: none"> run for at least two hours host at least 10 prospective Xero clients include a presentation on or feature Xero include Xero branding (such as Xero brochures or cards) <p>Note: please provide event photos to Xero at the conclusion of the activity</p>	<ul style="list-style-type: none"> events for colleagues and internal office parties events where Xero isn't proactively discussed events with fewer than 10 prospective Xero clients events that include other accounting software providers purchase of alcoholic beverages
Sponsored events	<ul style="list-style-type: none"> event promotion and event costs, including vendor attendance, booth space and speaking opportunities 	<ul style="list-style-type: none"> host at least 25 prospective Xero clients include Xero branding throughout activity <p>Note: please provide event photos to Xero at the conclusion of the activity</p>	<ul style="list-style-type: none"> accommodation and travel events where Xero isn't proactively discussed events with fewer than 25 prospective Xero clients

Signage

Activity	We can help fund...	Your activity must...	We won't help fund...
Exterior office signage	<ul style="list-style-type: none">• exterior signage that includes a Xero partner badge	<ul style="list-style-type: none">• include a Xero partner badge• Xero partner badge must be 20–25% of the total size	<ul style="list-style-type: none">• signage with just the Xero corporate logo
Vehicle signage	<ul style="list-style-type: none">• signage that includes a Xero partner badge	<ul style="list-style-type: none">• include a Xero partner badge	<ul style="list-style-type: none">• signage with just the Xero corporate logo

Swag

Activity	We can help fund...	Your activity must...	We won't help fund...
T-shirts, socks, water bottles	<ul style="list-style-type: none">• creation of swag that promotes your firm and includes the Xero partner badge	<ul style="list-style-type: none">• include a Xero partner badge	<ul style="list-style-type: none">• swag that doesn't include the Xero partner badge

Marketing consultants

Activity	We can help fund...	Your activity must...	We won't help fund...
Working with marketing agencies on campaign development and execution	<ul style="list-style-type: none">• your work with the consultant on developing a marketing plan, or executing the tactics listed in this guide	<ul style="list-style-type: none">• be within the scope of the approved marketing activities listed in the partner marketing fund guide	<ul style="list-style-type: none">• work that doesn't include promoting Xero

The legal stuff

Using the Xero brand

A Xero partner badge or certified advisor badge must be included in all co-branded marketing materials and comply with our guidelines outlined in this guide. Note that the Xero logo may not be used by itself.

Staying within the law

All advertisements must comply with applicable laws and it is the partner's responsibility to ensure that all activities comply with these laws. Advertisements must not breach another person's copyright or other intellectual property rights.

Promoting Xero

Any marketing activity that promotes Xero, or is funded in part or whole by Xero, needs to be Xero-specific and cannot mention other accounting software products. Xero branding must appear in all activities.

Your legal liability

Approval of an activity by Xero does not imply acknowledgment of legal compliance. If Xero is liable because of any unlawful partner marketing activities, the partner must indemnify Xero for all costs.

Your responsibilities

You must ensure that activities:

- do not bring Xero into disrepute
- are not misleading or deceptive in any way

Funding subject to review

The partner marketing fund is subject to review by Xero and may be withdrawn or amended at any time without notice.



Guidelines for using the Xero brand and Xero materials

When you use the Xero brand on promotional materials it reflects on our business as well as yours. That's why we must approve any use of the Xero brand and partner logo. We want to make the approval process quick and easy for you. We'll do our best to give you a speedy and helpful response. Contact your account manager if you have any questions.

"Xero" is a registered trademark and can't be used by partners or any third parties other than as expressly authorized by Xero. Certified partners are permitted to use the Xero partner logo in accordance with our guidelines.

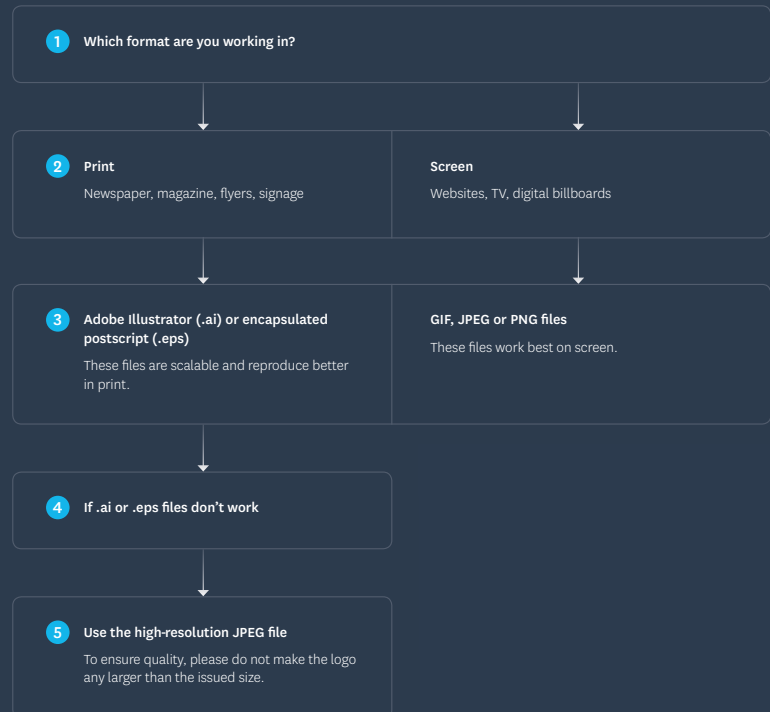
You can...	but please...
use the Xero partner logo and Xero URL (www.xero.com) in promotional material	<ul style="list-style-type: none">• don't use or alter them in a way that's against our logo guidelines (see page 13)• don't use "Xero" in your company name, product name, service offering or URL
use text, images, screenshots, photos and other content produced by Xero in promotional material	<ul style="list-style-type: none">• don't use them without our approval• don't copy or obviously adapt the design style of www.xero.com or the Xero application• don't use the Xero corporate blue
promote the Xero brand	<ul style="list-style-type: none">• don't make it more prominent than your own brand. Your brand needs to be dominant
imply endorsement by, or affiliation with, Xero	<ul style="list-style-type: none">• don't do so without our approval
use promotional material provided by Xero for Xero products or services	<ul style="list-style-type: none">• don't alter materials and/or apply your own brand to them without our approval

Xero partner logo guidelines

Use one of your Xero partner logos to show your status and to promote your partnership with Xero. Get in touch with your account manager if you are unsure of your partner status. Please don't use the Xero logo without the corresponding partner badge.

You can get your Xero partner logo from your Xero account manager.

Which logo file do I use?



Xero partner logo guidelines

Minimum sizes for the partner logo

To ensure legibility, please make sure the partner logo isn't smaller than:

Print: 10mm in height (excluding clear space)
Screen: 40px in height (excluding clear space)



Space around the partner logo

The logo must have a minimum amount of clear space around it. The clear space needs to be equal to the width of the "x" in the Xero partner logo.



Partner logo colors

The Xero certified advisor logo can be used by individual advisors who are Xero certified.

Once you're a certified bronze partner or higher, an individual advisor can use both the certified advisor and partner status logo (for example, on their business cards). Websites and material promoting the practice can feature the certified advisor logo or the partner status logo. If you are unsure of your partner status, please check the partner program tab in the Xero partner toolkit or contact your Xero account manager.



Dark Blue
Print: c:100 m:35 y:35 k:0
Screen: R:0 G:130 B:155
Pantone: PMS:315



Gold
Print: c:0 m:19 y:100 k:0
Screen: R:255 G:204 B:0
Pantone: PMS:7408



Bronze
Print: c:30 m:62 y:72 k:13
Screen: R:163 G:103 B:75
Pantone: PMS:4705



Platinum
Print: c:62 m:54 y:54 k:27
Screen: R:92 G:91 B:90
Pantone: PMS:Black7



Silver
Print: c:0 m:0 y:0 k:40
Screen: R:167 G:169 B:172
Pantone: PMS:423

Xero partner badge size

Your logo is the most important. So when using the Xero partner badge in physical branding, print advertising or online, it's important to scale its size in proportion to your own logo. Here are some examples how the Xero partner badge should be scaled in relation to firm logos. Please note: The Xero partner badge should never be shown directly beside your firm's logo as a pair. The examples below are just showing proportion of size.

Wide logo example

The Xero partner badge should be scaled so that it could fit 1.5x into the width of your logo



Tall logo example

The Xero partner badge should be scaled so that it could fit 1.5x into the height of your logo



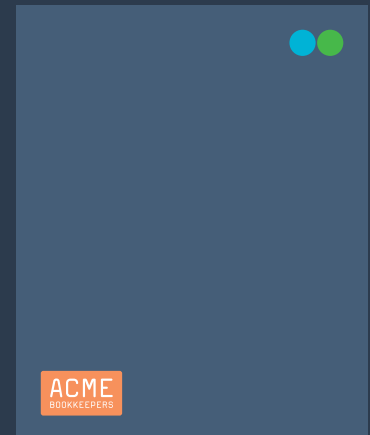
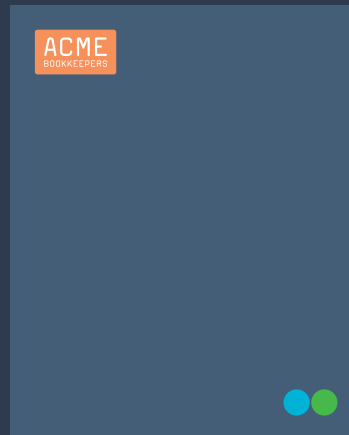
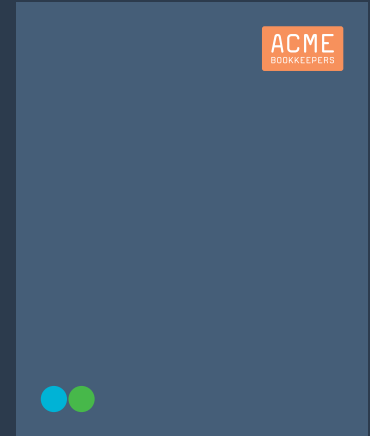
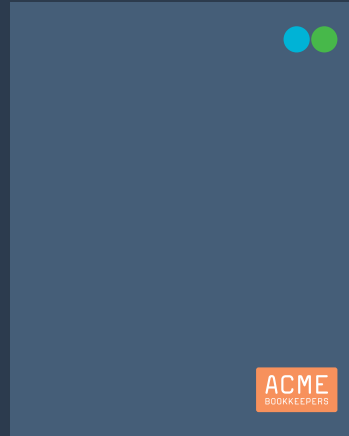
Circular or square logo example

The Xero partner badge should be scaled so that it could fit 1.5x into the width of your logo



Logo placement

The Xero partner badge should never be laid out next to your firm's logo as a pair. Your firm's logo should be at a prominent spot on your layout supported by the partner badge. Below are some example layouts that show this.



Quick list of Xero benefits for your marketing activities

We know writing copy can be hard so we've put together a quick list of Xero benefits that you can use in your marketing activity!

Work from anywhere

Xero's cloud-based software offers you the flexibility to access your data from anywhere with an internet connection. Stay connected with your team and enjoy the flexibility to work whenever and wherever you want.

Collaboration made simple

Xero's collaboration features make teamwork a breeze! Work on the same file at the same time, stay on top of updates and get more done together.

Connect with your customers

Xero simplifies the invoicing process with its user-friendly platform, allowing you to create and send professional invoices with ease. Plus, with online payment options, you can receive payments faster and improve your cash flow.

Easy to use

Xero's user-friendly interface and helpful features make accounting tasks more manageable and less time-consuming. Say goodbye to manual data entry and complicated spreadsheets, and hello to easy-to-use software that simplifies your accounting processes. With Xero, small business owners can spend more time focusing on their business and less time worrying about their finances.

Safe and secure

Protecting your financial information is crucial to the success of your small business. With Xero, you can trust that your data is secure. Xero is committed to providing top-notch security measures to give you peace of mind knowing that your financial information is safe and secure. Focus on growing your business and let Xero handle the security of your financial data.

Time-saving

Xero's automation features save small business owners time on manual tasks like data entry and account reconciliation, so you can focus on other important aspects of your business. Let Xero help you streamline your workflow and take your business to the next level.

Xero's robust app ecosystem

Xero integrates with over 1,000 third-party apps! Connect with other software tools and streamline workflows to manage all aspects of your business in one place. Automate processes and save time on administrative tasks so you can focus on what really matters — your business.

Connect your bank accounts

Xero's integration with bank accounts automates data entry and account reconciliation, making it easier than ever for small business owners to stay on top of their finances.

Quick list of Xero benefits for your marketing activities continued...

Everything you need to grow

Xero's comprehensive suite of financial management tools, including payroll, expense claims, budgets and financial reporting, empowers small business owners like you to take control of your finances and grow your business with confidence.

Simple and convenient way to manage your business finances

With Xero's user-friendly interface and mobile app, you can easily manage your finances from anywhere, whether you're on a Mac, Windows, iPhone or Android device. Plus, Xero's automation features can save you time and make your accounting tasks a breeze. Say goodbye to manual data entry and hello to a more streamlined, efficient financial management process.

Cost-effective solution

With flexible pricing plans that can be scaled up or down as your business grows or changes, Xero is the perfect solution for small business owners who want to save time and money on manual accounting tasks. Plus, with powerful automation features, Xero can help you streamline your accounting processes and focus on what really matters — growing your business!

Make smart business decisions

No more guesswork, no more waiting for reports — with Xero, you'll have the information you need right at your fingertips. Xero provides real-time financial insights that enable small business owners to make informed decisions quickly and easily, helping them take control of their business's future.

Marketing tips: How to get more bang for your buck



Research

Understand who your target market is and the size of that potential market.

Start by answering these questions:

- Why are you targeting this particular market?
- Is the market big enough?
- Can you easily identify and reach the right audience?
- What are their key pain points that you can help solve?
- Why would they benefit from what you are offering?



Map it out

Before you start doing anything, you need a rock-solid plan. Set an overall objective, make it achievable and be sure success can be measured.

Start by answering these questions:

- What are you trying to achieve by doing this?
- What is your offer or hook? Why would people respond to this?
- What resources will you need to deliver your activity?
- How many leads can it generate?
- How much will the activity cost?
- What is the cost per lead?
- When you have the leads, how are you going to close them?
- What's the timeframe?
- How will you measure the success of this activity?



Save costs where you can

Shop around and get a few quotes for your activity. You can compare pricing, quality and the service offered to make sure you get the best deal.

- If you organize your activity well in advance, you might get a cheaper price with your supplier.
- Think about printing flyers in bulk and then using them over a longer period.
- The more you print, the cheaper the per unit cost.
- Consider your branding and whether it will change. Avoid printing things that will become out-of-date quickly.

Marketing tips: Creating a great ad

You don't get a second chance to make a good first impression. Make sure your ad comes across as professional and credible.

Here are some hot tips for successful ads:

Use high-quality images

You can download high-quality images of people using Xero on different devices from the Xero partner toolkit.

Have a clean, uncluttered layout

Less really is more, as most ads will just be glanced at.

Use fonts consistently

Too many fonts or font sizes can be distracting.

Use the Xero partner logo

Follow the logo guidelines (see page 14).

Have an attention-grabbing headline

Posing a question or stating an idea works well. Support your headline with brief and succinct body text.

Include a call to action

Usually it'd be a prompt to get in touch.

Include your contact details

Have your company name, logo and contact details easily readable.

Use our templates

We've provided templates to help you design beautiful marketing materials, using our favorite demo company, Acme Bookkeepers.

There are templates for creating a great press ad, printed collateral, building signage and company vehicle branding.

For example...

Your website URL should be positioned here.

www.acme.com

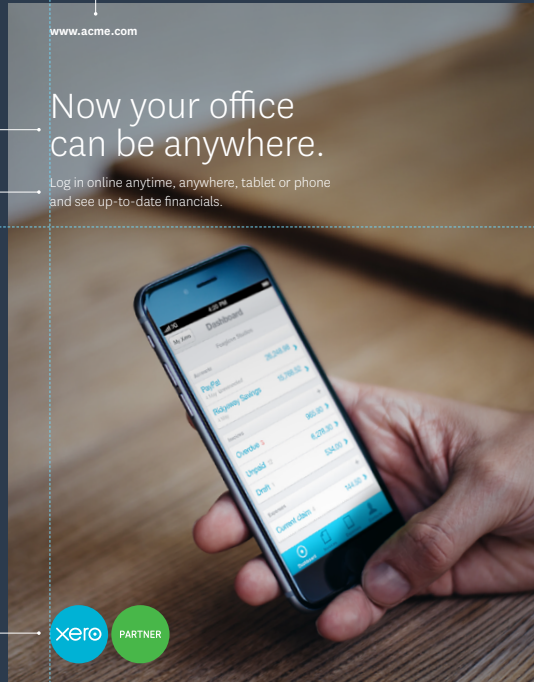
A short and sharp headline.

Now your office can be anywhere.

Succinct and mindful body copy.

Log in online anytime, anywhere, tablet or phone and see up-to-date financials.

An image with clear space on the top third is suggested so that your information is prominent.



Xero Partner logo to be positioned here.



Your 'Call to Action' should go here.

Call us on 9455 5555

hello@acme.com or email@acme.com
1/6 Elizabeth Street, Hawthorn 3122, VIC



Xero Partner logo, Call-to-Action and Company logo should be neatly aligned.

Position your company logo here.

Print advertising

Single page example

Your website URL should be positioned here.

Xero Partner logo to be positioned here.

A short and sharp headline.

Succinct and mindful body copy.

An image with clear space on the top third is suggested so that your information is prominent.

Your 'Call to Action' should go here.

Call-to-Action and Company logo should be neatly aligned.

Position your company logo here.

www.acme.com

XERO PARTNER

Now your office can be anywhere.

Log in online anytime, anywhere, tablet or phone and see up-to-date financials.

Call us on 9455 5555

hello@acme.com
3 Pleasant Street, Happyville

ACME
BOOKKEEPERS

Position your company logo here.

Print advertising

Multi-page spread example

An image with clear space on the left half is suggested so that your information is prominent.

Xero Partner logo to be positioned here.

Your website URL should be positioned here.

A short and sharp headline.

Succinct and mindful body copy.

Call us on 9455 5555
hello@acme.com
3 Pleasant Street, Happyville.

Call-to-Action and Company logo should be neatly aligned.

Your 'Call to Action' should go here.

Position your company logo here.

www.acme.com

Now your office can be anywhere.

Log in online anytime, anywhere, tablet or phone and see up-to-date financials.

XERO PARTNER

ACME
BIDDABLE PAPERS

Print advertising

Wide banner example

The banner is divided into three vertical sections. The left section features a headline and body copy. The middle section shows a hand holding a smartphone displaying a mobile app interface. The right section contains the company logo and contact information. Annotations with arrows point to specific elements, and a vertical dashed line separates the image from the text and logo.

Your website URL should be positioned here.

An image with clear space on the left half is suggested so that your information is prominent.

Position your company logo here.

A short and sharp headline.

Succinct and mindful body copy.

Now your office can be anywhere.

Log in online anytime, anywhere, tablet or phone and see up-to-date financials.

Xero Partner logo to be positioned here.

Call us on 9455 5555

hello@acme.com
3 Pleasant Street, Happyville

Your 'Call to Action' should go here.

Call-to-Action and Company logo should be neatly aligned.

Print collateral

Multi-page flyer example

Use a Xero supplied product photo here.

Talk about your firm and your service offering here.

Talk about Xero and how your firm works in the cloud here.

Xero Partner logo to be positioned here.

Position your logo here.

A short and sharp headline.

ACME BOOKKEEPERS

Now your office can be anywhere.

Xero

You love your business, we'll love your books

Use an up-to-date Xero supplied product image.

We love Xero beautiful accounting software

Call us on 9455 5555

ACME BOOKKEEPERS

Xero Partner logo to be positioned here.

Your "Call to Action" should go here.

You can use your own firm's colors here.

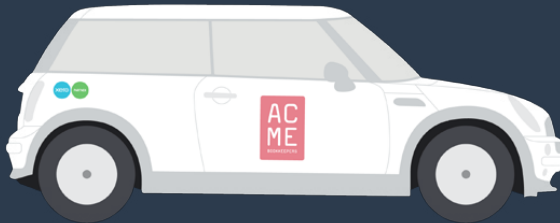
Building signage

Recognizing your Xero partner status on the outside of your building can be a great tool for finding new clients and associating your company with Xero. We recommend placing the Xero partner badge near the entrance to your firm, but with appropriate prominence in comparison with your own logo. Below are some ideas of how to introduce the Xero partner badge to your building exterior.



Branded vehicles

If you are including the Xero partner badge on your branded vehicles, make sure to use the correct proportions for the badge in relation to the size of your company logo. The badge should be placed on the same side that your logo is, so both can be seen together. But they shouldn't be aligned closely as a pair.



Thanks, & happy marketing!

If you've got questions or feedback, please contact your Xero account manager.

