

Transforming data into strategic advisory services

From your first strategic conversation to becoming a trusted business partner, Xero and Syft work together to help you to scale advisory services across your entire client base.

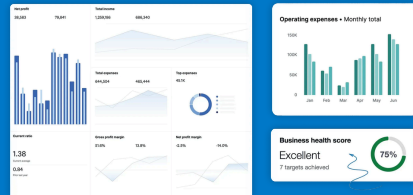
Built for accountants and bookkeepers



Syft Analytics

Build profitable advisory services and deliver high-impact advice with automated reporting, forecasting and consolidations.

Built for small businesses



Xero Analytics

Initiate meaningful conversations with clients using compelling visuals, readying them for more strategic discussions.

Key benefits of Syft

Financial Oversight

Entity	Financial Overview	Next Review	Next Meeting	Total Cash
Branch A	98%			
Branch B	95%			
Client C	92%			
Client D	88%			
Client E	85%			
Client F	82%			

Deliver proactive advice for every client

Build deeper client trust and lasting relationships. Monitor all client performance in one place and prioritise your time to provide proactive advice to clients when it matters most.

Key benefits of Xero



Discover advisory opportunities

Instantly transform client data into conversation-ready visuals. When your clients understand performance trends, they can act on what's working and address what isn't.

Streamline business analysis

Move beyond compliance and deliver high impact reporting at scale with templated reports. Automations and AI insights eliminate manual analysis, reducing client meeting prep time so you can focus on strategic advice.

Profit and Loss

Account	Oct 2023	Nov 2023	Variance
Sales			
Retelling Lessons	\$10,000	\$10,000	\$45,927 ▲
Tax	\$4,346	\$4,346	\$0 ▲
Partners' Fees	\$4,346	\$4,346	\$4,346 ▲
Customer Sales	\$12,289	\$12,289	\$5,100 ▲
Churned Sales	\$0	\$0	\$0 ▲
Other Sales	\$0	\$0	\$0 ▲
Total Sales	\$26,681	\$26,681	\$65,373 ▲
Cost of Sales			
Partnership material	\$207	\$270	\$163 ▲
Ingredients	\$16,689	\$16,689	\$0 ▲

Profit and Loss accounts - Monthly total



Help clients achieve their goals faster

Keep clients on track and informed. Set goals together, monitor them in real-time, while maintaining complete clarity on performance and priorities.

Scale impact, not effort

Deliver accurate, compelling advice with consolidated data from different platforms, entities, and currencies. As your clients grow, your tools keep pace to ensure practice efficiency stays effortless.

US Branch	UK Branch	AUS Branch
\$1,000	\$1,000	\$1,000
\$2,000	\$2,000	\$2,000
\$3,000	\$3,000	\$3,000
\$4,000	\$4,000	\$4,000
\$5,000	\$5,000	\$5,000
\$6,000	\$6,000	\$6,000
\$7,000	\$7,000	\$7,000
\$8,000	\$8,000	\$8,000
\$9,000	\$9,000	\$9,000
\$10,000	\$10,000	\$10,000

Net cash movement - 30 days



Guide next steps with clarity

Swap spreadsheets with clear projections. When you give your clients data-driven visibility into what's around the corner, they'll make decisions with complete confidence.

How Syft Analytics has helped **Krishan Sharma, Partner at KNS Accountants & Business Advisors** provide more value to their clients, and driven growth:



How Xero Analytics has helped **Macushla Collins, Founder of The BD Edge** make more confident business decisions:

“Syft Analytics has empowered us to deliver more strategic advice at scale, giving us the confidence to offer proactive guidance to our clients. We’ve seen a significant 20% increase in revenue from advisory services, thanks to features like Syft’s scheduled reports and AI-generated insights.”

“These new analytics features from Xero are exactly what I’ve been looking for. Instead of searching for another tool, I can now get the clear financial understanding I need, right within Xero. I’m looking forward to using these insights to feel more confidence in my business decisions.”

Analytics across Xero and Syft plans

As a Xero partner, you’ll get access to corresponding Syft plans at no extra cost *Terms and conditions apply.

If your clients are on	Your practice has access to	Best for	Key capabilities
			
Early	-	Regular business health checks	Xero: Basic visuals, performance dashboards, and 30-day cash flow.
Growing	Plus	Automated management reporting	Xero: Customisable performance dashboard, KPI graphs, and tracking category filters. Syft: Multi-entity consolidations, AI insights, automated management reports, practice oversight of performance, benchmarking, 4-way forecasts and data reviews.
Established	Advanced	Complex group analysis and strategic forecasting	Xero: 180-day cash flow, advanced KPI analysis, up to 5 dashboards, colour and styling options. Syft: Multi-level consolidations for group reporting and cohort benchmarking.

Getting started is simple

- 1. Log in to Xero:** Access Analytics in the Reporting menu via the navigation or in the Reporting center.
- 2. Activate Syft:** Create a Syft account and connect your qualifying Xero business plans.
- 3. Automatic Sync:** If you upgrade or downgrade your Xero plan, your Syft plan automatically adjusts to match.

Terms of the Syft offer

This offer is available to your qualifying business plan subscriptions (Growing, Established). We will provide Syft Analytics software, at no additional cost, to these business plan subscriptions. In each case, the Syft plan will correspond to your Xero business plan subscription. If you upgrade or downgrade your Xero subscription, the corresponding Syft plan will also be upgraded or downgraded. If you downgrade your Xero subscription to one that does not qualify for this offer then you won’t continue to receive Syft Analytics software at no cost, but you can continue to use it by purchasing from Syft directly. This offer may be changed or withdrawn in accordance with Xero’s Terms of Use.