



# Become the advisory powerhouse you want to be with Xero's automations

Gone are the days of handing a client a balance sheet and an income statement and leaving it at that. Clients, especially small business owners, want your financial and business advice. Your clients want to understand how they can improve their cash flow, scale their business, and ensure they're set up for long-term, sustainable growth. They want more than a bookkeeper; they want a guide who can help support them along their journey. Xero makes it easier to provide that guidance.

**The future of accounting is in client advisory services.**

## How Xero gives you the time to be a superstar customer advisor

Xero's cloud solution can connect all your apps, so you spend less time navigating disconnected systems and more time focusing on what matters.

As much as customers want advisory – and accounting professionals want to be able to provide it to them – there are barriers to offering it. Many accounting firms are simply too weighed down by tedious, manual tasks. The way to escape the gravitational pull of all these manual tasks? Automation.

Xero's automation makes time-consuming tasks quick and easy – so you can spend less time cleaning up your clients' books and more time strategizing on how to grow their business.

### 29% of teams

do not have standardized processes, reporting, or technology defined for any specific industry.

### Just half (51%) of teams

are committed to investing in the latest tools to support their advisory practice.

### Only a tiny fraction (13%) of teams

have managed to reduce their repetitive tasks through independently creating their own robotic process automation (RPA) workflows.

– [CPA.com CAS Benchmark Survey](#)

## 1 Make chasing payments a thing of the past

Xero provides secure online payment options right from your invoices – meaning customers can pay directly online, reducing friction for them and reducing time spent chasing down payments for your clients. So, instead of “Just following up...” you can focus your energy on higher-impact tasks.



**I get all my clients on Xero invoicing, autopay, and Stripe. It saves us hours.**

**Misty Newsome**  
Owner, Newsome CPA



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**We use the cash coding screen to reconcile literally thousands of transactions at a time.**

**Michelle Frank**  
Founder, High Echelon CPA



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## **Eliminate tedious reconciliation work**

Xero's bank feeds help match transactions automatically, so you can spend less time manually reconciling. Over 21,000 financial institutions connect to Xero via direct bank feeds, but you can also easily add PDFs or snap a photo from your phone and it'll import directly into Xero via Hubdocs.

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## **Empower your clients to understand their finances**

Whether your clients want to track individual project performance or look at historical trends, Xero's automated dashboards help you track time, expenses, and profitability with auto-generated summaries. It makes it easy for clients to understand their financial picture. That means you can move past basic conversations unpacking what their balance sheet and income statement means, to co-strategizing on how they can improve the metrics that matter to their business.

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**The clients who have engaged and have taken the time to learn how to navigate Xero have loved it. They love the real-time data and the ability to look at historical financial data without having to dig up old PDFs.**

**Vladimir Tkach**  
Founder, V. Tkatch CPA PLLC



## **Advisory is the future**

After AI, accountants rate advisory as the most important opportunity this year. Almost all (91%) practices that began offering this service said it makes them look more knowledgeable to clients and helps them better meet their clients' needs.

Advisory is also key to growth – many firms expect an increase in revenue this year because they're offering more services, such as advisory.

[Research from CPA.com](#) shows that firms that “strongly agree” their organization is committed to continuous investment in technology to support their advisory practices see higher client revenue, higher median net fees per professional, and a greater number of total clients. More than half (64%) of top performers count themselves among this group.

**91%**

of practices that began offering advisory said it makes them look more knowledgeable to clients and helps them meet their clients' needs.

**Xero, 2025 State of the Industry Report**



# Automation is the key



Automation has the potential to unlock a handful of benefits, including the ability to serve larger client bases, make more money, and invest in the deep, relationship-building work that advisory requires. When you're not manually reconciling transactions, paying bills, or chasing down payments, you have more time and energy to be a thoughtful and engaged partner to your clients.

[13% of teams](#) are trying to reduce their repetitive tasks through independently creating their own robotic process automation (RPA) workflows. Another 67% have found a better way by partnering with software vendors, like Xero, that help them achieve these tasks within their existing workflow.

[20% are looking](#) to third-party providers to implement these capabilities.

The right software vendor can provide the tools and efficiency resources you need to be able to automate your routine tasks in a way that's intuitive to your workflows, allowing you to spend more time supporting your clients as they navigate core questions about their business.

That's why 73% of top performers are more likely to partner with a software provider in order to achieve their automation goals, according to [CPA.com's CAS Benchmark Survey](#).

## It's time to break free and be the advisor you've always wanted to be

To achieve your customer advisory dreams, you need an effective technology strategy.

The most accessible solution is to use software that's already doing this effectively, like Xero. Getting your clients on Xero can help eliminate the tedious, manual headaches of processing invoices, reconciling transactions, and chasing down payments. And as our partners can confirm, it makes it easier for their clients to understand their own financial picture.

Using a tool like Xero will put you in a great position to start having more meaningful conversations with your clients. It'll help you move beyond day-to-day transactional concerns and think about the important metrics that will help their business grow.

Freeing yourself from the burden of all those manual tasks is possible – as long as you have the right support. And when you do, you can repurpose all that free time into becoming a great advisor to your clients.

