

Xero place for Cloud Integrators – think again!

When I first sat to write this article, my initial aim was to get all Accountants and Bookkeepers to work with an Authorised Cloud Integrator, because I know how much value we can add to their practice! Whilst this would be an amazing achievement, it's great to have the opportunity to highlight the value of a cloud integrator in the ecosystem...

The bookkeepers and accountants I have worked with to date have been very open minded and understanding of our place. They are proactive thinkers and what I like to refer to as a “New Breed” of accountants and bookkeepers who are happy to embrace change for the future of their business and that of their clients. If you're not yet convinced of our place in the “support network” for small business, then read on...

If you are one of the proactive Accountants and Bookkeepers to which I refer, but have yet to make

contact with an authorised cloud integrator, maybe now's the time to do so. You're probably already part of a cloud-based firm, you love the practice management tools and the information it gives you, and what it's done for your workflow. Well imagine if you could transform your client's business in the same way... and in turn provide your firm with even more accurate and non-financial data to increase the scope of the advisory services you offer.

Well that's exactly the “Invisible Business Solution” we offer to Business as an Authorised Cloud Integrator.

With over 1 million subscribers to Xero, it appears many don't use the full potential of data available to them, other than for historical and statutory reporting and even less are yet to adopt the amazing ecosystem of Apps and Add-ons for their business. However, many don't actually use the data available other than for historical and statutory reporting and even less have yet to adopt the amazing eco-system of Apps and Add-ons for their business.

Why? Well I believe it's because they fear changing the foundations of their business, they need a guide; an independent and trusted advisor, an expert in their field to assist them through the change, and that's where Cloud Integrators come in!

Cloud Integrators provide

identification, implementation, training and support of cloud-based solutions from across the Xero eco-system and in different areas of industry. Rarely will you find an integrator that can cover all the apps, so most will niche in particular areas and business types, for example, Professional Services, Trades, Health and Wellness, Manufacturing, Retail or Agriculture. Not only do we provide technical systems knowledge, but the ability to manage the project from start to finish while facilitating the necessary and important change management process for the business.

There are a number of motivators that drive small business to adopt these cloud solutions:

- Save time
- Save money
- Increase capacity
- Enable remote management
- Provide competitive advantage

Understanding what drives the client, what challenges they currently face and how the software can help them are all part of the skill of being a cloud integrator. But why would an Accountant or Bookkeeper choose to work with a cloud integrator? What are the benefits and value for you and your client?

For your clients:



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Helen Goodman, Authorised Cloud Integrator, **Invisible Business Solutions**

Helen Goodman FCCA is #notyourordinaryaccountant, with 20 years experience as a management accountant in the corporate world, Helen now runs a successful cloud integration business to identify, implement, train and provide ongoing support to small business looking for cloud solutions. Invisible Business Solutions was one of the first Authorised Cloud Integrators to be recognised by Xero.

Engaging with an independent Authorised Cloud Integrator will ensure your client is recommended the right software for their business. They will receive expert implementation management and have the confidence that their software is set up right the first time. Why is that important? Because their business depends on it!

For you as a Bookkeeper and Accountant:

The data syncing through to Xero has an audit trail. From original transaction to posting in Xero you can trace the business activity. There is less risk of error in the collection of data and posting of transactions and greater access to non-financial data.

As the role of Bookkeepers and Accountants continues to evolve there will be less data entry and transactional processing and the role will become more about data

validation, interpretation and advice. The ability to trace source data and have access to non financial metrics will allow you to provide your client with even more meaningful analysis.

Choosing an Authorised Cloud Integrator to work with...

The key factors to consider when choosing a Cloud Integrator are:

- Experience and knowledge in the industry your client trades in.
- Compatibility of style, with both your practice's culture and that of the client. It's important to know who you work with, their background and industry and system knowledge.
- Understanding of Accounting so that not only does the sync between Xero and the app run seamlessly, but that the Cloud Integrator explains the value of the information now available in both the new app and in Xero.
- Accountability; Cloud Integration

is not just about systems its people management and training, which contribute to a successful transition.

- Training and ongoing support are also vital for continued success of the implementation.

In a nutshell that's a Cloud Integrator, so there IS a place for us and Xero have plans to grow the channel in the future so we are here for the long term. Hopefully this article has persuaded a few more Accountants and Bookkeepers to engage with us and if we have sparked your interest then you can find us in the following ways:

1. Xero.com at www.xero.com/au/partner-programs/cloud-integrators/directory/
2. Ask your Xero Account Manager for a recommendation
3. Check out the App Directory of Partners
4. Simply Google 'Authorised Cloud Integrator'



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- Comprehensive performance and tax reporting
- Easy trade and dividend reconciliation

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Everyone's a Cloud Integrator, even with Xero experience!

Cloud Integrators are certainly becoming more popular! From experience, even five years ago when I started my business, it was only the early adopters who were keen to try the cloud...

Today more and more businesses are turning to us in order to keep their business ahead of the game. However, if Cloud Integrators are to go 'Global' then we must streamline to process within Australia and New Zealand and set the standard for the rest of the world.

With Cloud technology coming to the forefront for small business, there are a range of people jostling for position in the Cloud Integration arena, from Sales Teams to Bookkeepers to IT Professionals to Management Accountants, the list goes on. So who's the right person to be 'Cloud Integrating'? How do you ultimately ensure you get the right person for the job, and that your client gets the best outcomes with the right App.

There are many benefits to the Xero Eco System of Cloud Integrators being at the heart of the system. See our infographic which clearly illustrates the value of a Cloud Integrator.

But beyond the benefits, what skills are required to be a great Cloud Integrator? Well in my view you need to be able to do the following...

- Quickly and concisely understand where a business is currently at and what they hope to achieve by adopting cloud technology.
- Be able to communicate the benefits of the App options, but also advise of the limitations (if or where they are appropriate)
- Be able to communicate the value of the new information that the business will have. As well as be able to quantify the value of the efficiency savings. I had a client just the other day where we have



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identified over 4 hours A DAY that they will save in Admin!

- To be able to assist the business in change management – there is often resistance to change from someone within the organisation, and being able to bring them along with the benefits of the project is essential.
- To be able to provide tailored training for each user, so that everyone understands how the new App works, and importantly WHY they need to use the App.

At the end of the day I believe experience matters and not everyone can be an effective Cloud Integrator. The challenge I believe we face is how to regulate the Cloud Integration Channel (without monopolising it) otherwise the Apps and ultimately the Xero Ecosystem will suffer.

So here's my advice for how to choose a Cloud Integrator to get the best for your clients:

1. Do they have experience and knowledge in the industry your client business is in?
2. Is their style compatible with both your practice's culture and that of the client. It's important to know who you work with, their background, industry and system knowledge.
3. Do they understand Accounting and the Value of the Information that will be available. This

BENEFITS OF A CLOUD INTEGRATOR FOR...



ensures that not only does the sync between Xero and the app run seamlessly. But that the business can understand and use the information they now have available, and that you as their bookkeeper or accountant can use the additional information to provide value added services.

4. Is ongoing training or support available for both you and your client?
5. Are they listed on Xeros Approved Cloud Integrator directory.

How to find a Xero Authorised Cloud Integrator?

1. Xero.com at www.xero.com/au/partner-programs/cloud-integrators/directory/
2. Ask your Xero Account Manager for a recommendation
3. If you know which app your client needs check the Apps Directory of Partners (although this list isn't approved by Xero)
4. Listen to Ep: 49 of Cloud Stories podcast by Heather Smith for our discussion on the benefits of working with a cloud integrator.
5. Simply Google 'Authorised Cloud Integrator'.



Are Xero and Cloud Integrators on the right track? 'App'solutely!

In my last couple of articles we talked about the role Cloud Integrators play in the Australian/NZ market and the value we add to the Xero eco-system. We were also waiting for 'Xero' season to start and what they had in store for us at Xerocon Melbourne and in the weeks since, it's been pretty exciting to see the changes...

The sessions around Cloud Integration at Xerocon Melbourne on Uni Day and Day 1, both focused on how easy Accountants and Bookkeepers have found it to work with Cloud Integrators and how they couldn't have met their clients needs without this additional support. This was fabulous to hear from the wider community (and not just the feedback we get from our clients!). It was also fabulous to discover that the Xero Eco-system team had grown from 1 to a team of 4 across Australia and NZ, this in itself means Xero still believe in us, it also brings with it new ideas and more importantly industry experience to meet the needs of the Apps and the Cloud Integration partners, which in my view is very exciting!

One of the key themes of Xerocon was how small the world is becoming and how we can provide global support from anywhere, we are now connecting advisors, cloud integrators and Apps that are all focused on helping small business be more efficient, free from paperwork and have the ability to grow business quicker! Times are

certainly changing, but is it for the better, App-solutely it is!

Over the last 5 years the conversations around cloud computing have really changed. From the early days where fear of the unknown, loss of control and security were the most frequent barriers, today these barriers are significantly less and those that remain are more about the challenges of choice, connectivity and data flow between solutions.

Accounting firms and Bookkeepers have been at the forefront in adopting cloud solutions. Firstly Xero, and then with the accessibility to solutions such as Receipt Bank and Expensify and with practice management (XPM and others) it has enabled even sole traders to scale and grow their business. The suite of Apps for Accountants and Bookkeepers has been well defined.

The adoption of time saving, flexible solutions is now taking hold in the wider 'small' business community. Most small business owners we talk with would like nothing more (apart from winning the lottery), than to find ways to

minimise the paperwork, reduce the amount of information they need to remember and never have to process invoices late at night again! (I think there's an App for that too).

But how can they be sure that they are adopting the right solution for their business. Small business these days have to be flexible and adaptable to survive and they need software that suits that need too. They also need to know that the options they choose will be able to scale and grow with them, or at the very least be the foundation of their business from which to grow!

This challenge is never ending. With over 500 apps in Xero's eco-system how can any small business (or Accountant or Bookkeeper be across them all?) The answer is that they simply can't – and that's why the Cloud Integration channel is such an awesome resource for Accountants and Bookkeepers in which to choose from.

As Cloud Integrators, we specialise in verticals, with particular apps for each business type... Trades, Professional Services or Inventory Management for example. As such



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we are awesome examples of niche and grow...

So are Cloud Integrators here to stay, App-solutely in fact I believe that over the next 5 years Cloud Integration services will become key elements of Accounting and Bookkeeping firms offering, the next generation of our profession will adapt and change to the changing needs of their small business clients, so until then, Xero and the cloud Integrators are here to help.

If you need to find a Cloud Integrator...

1. Xero.com at www.xero.com/au/partner-programs/cloud-integrators/directory/
2. Ask your Xero Account Manager for a recommendation or
3. Check out your preferred App Directory of Partners
4. Simply Google Authorised Cloud Integrator



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