

GROW YOUR PRACTICE WITH APP ADVISORY

Get started on your App Advisory Journey

How to recommend the right apps to your clients



Joe Mulcare

Partner Consultant, Xero Asia

Beautiful business



Agenda



**What is App
Advisory?**



**How to get
started**



**Boosting
profits**



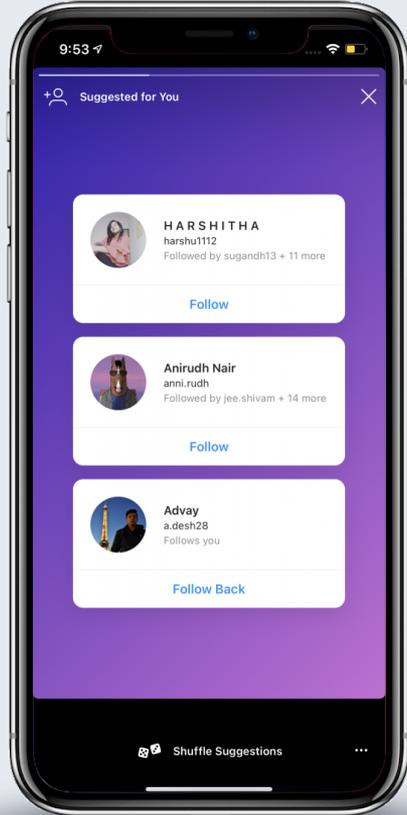
Inspiration



**Resources
& tips**

What is App Advisory?





9:53

+ Person Suggested for You X



HARSHITHA
harshu1112
Followed by sugandh13 + 11 more

Follow



Anirudh Nair
anir.rudh
Followed by jee.shivam + 14 more

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a.desh28
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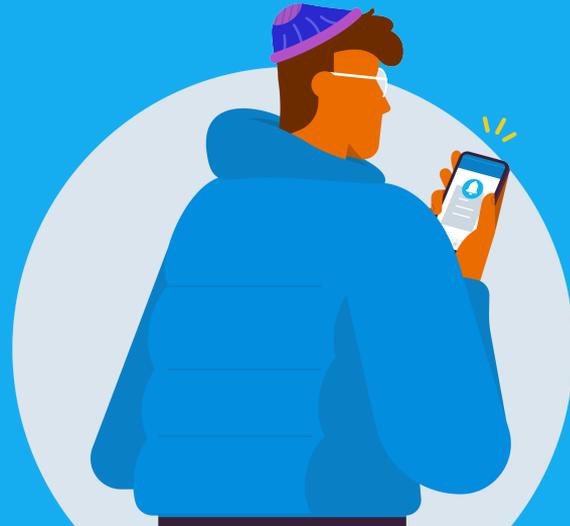
Follow Back

Shuffle Suggestions ...

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In a commercial context:

A professional service that involves understanding the challenges or opportunities a business is facing, and advising them on the right apps to employ to meet these.



How to get started



The App Advisory Process

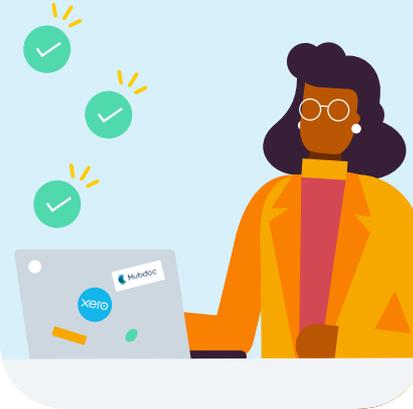
Step 1: Listen to clients and understand what they are looking for



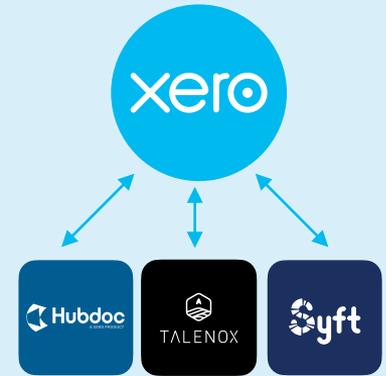
Step 2: Evaluate pain-points and opportunities and find solutions



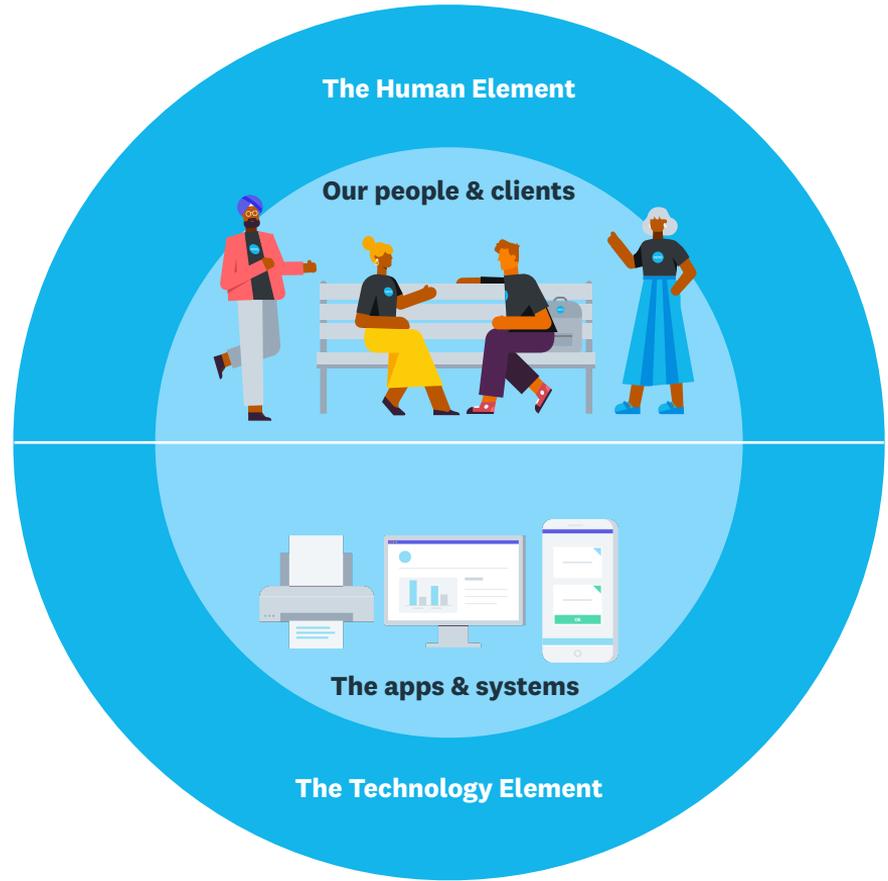
Step 3: Recommend solutions and guide clients through change



Step 4: Apply findings to grow expertise and standardise offering



There are two sides to App Advisory



Tackling the Human element

The Human Element

Our people & clients



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Do we have the right mindset?



**Staff in
appropriate roles**



**Curious and
innovative**



**Encouraging client
touch points**



**Clear strategy and
staff alignment**

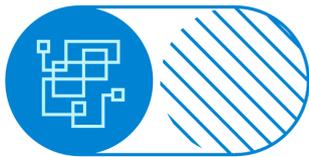
Do our clients have the right mindset?

Singapore small businesses struggle most with these behavioural barriers to new technology adoption:



Relative Judgement

They don't really know how to compare their options and make an accurate assessment of what will be good for their business.



Hassle Factor

At the end of the day, taking up new technology is just too much hassle. When they think about the effort needed, it is easier for them to stick with what they have.



Ambiguity, uncertainty

It all feels like a huge leap of faith. They just don't feel confident about deciding, and even if they do there's so much uncertainty about the outcomes.



Seeing losses, not gains

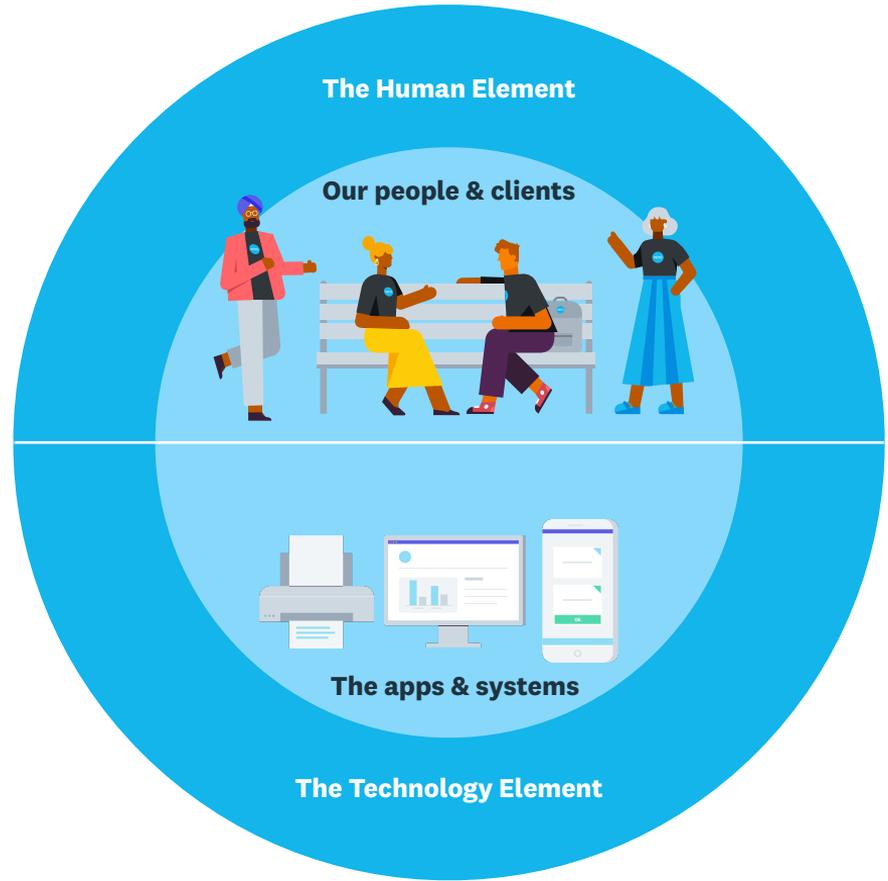
All they can think about is what researching and implementing new technology will cost them – all that time, money and effort!



Choice paralysis

Where do they even start? There are just too many options out there. It's overwhelming – and much easier to leave for another day

There are two sides to App Advisory





The apps & systems

The Technology Element

Tackling the technology element

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Build your core app stack



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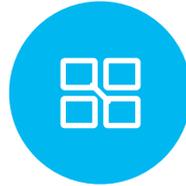
App Stack Building Blocks:



**Business
Development**



**Invoicing & Fee
Collection**



Data Automation



HR & Payroll



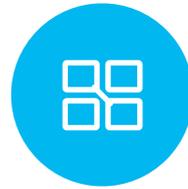
**Business
Intelligence**



Business Development



Invoicing & Fee Collection



Data Automation



HR & Payroll



Business Intelligence



Boosting our profits

**Selling the value of
our advice**



**Standardising our offering
and workflows**



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Clients buy from us because



**We get them from
their current state
to desired state**



**We're experts
in a niche**



**Our value has been
clearly articulated
to them**



**There is a true
win-win exchange**



If we genuinely believe we can positively impact our clients, then why are we scared to start the conversation?



Standardising your offering

Develop Partnerships



Automate Proposals and Payments



Grow your experts



Inspiration



Cloud technology can enhance business resilience

Decreases	% of practices	Clients using cloud accounting software	
		0-24% of clients	>25% of clients
Decrease in clients	13%	18%	8%
Decrease in staff	12%	14%	7%



Practices with a greater proportion of clients on cloud software have 21 more clients on average than those who don't





Singapore Corporate Services

Xero Partner



Specialist

Xero Migration



Partner status

Platinum champion partner



Experience

Partner since 2012



Certification

Xero advisor certified





Singapore Corporate Services

Xero Partner

Key apps



Size: Company, employs 18 staff

“

We are a future-ready accounting practice that help our clients to integrate their Accounting systems with other Apps.





Fresh Accounting

Xero Partner



Specialist

Xero Migration



Experience

Partner since 2014



Partner status

Platinum champion partner



Certification

Xero advisor certified





Fresh Accounting

Xero Partner

Key apps



Size: Company, employs 18 staff



Our client found us in the Xero WorkflowMax directory for both Hong Kong and Singapore locations!



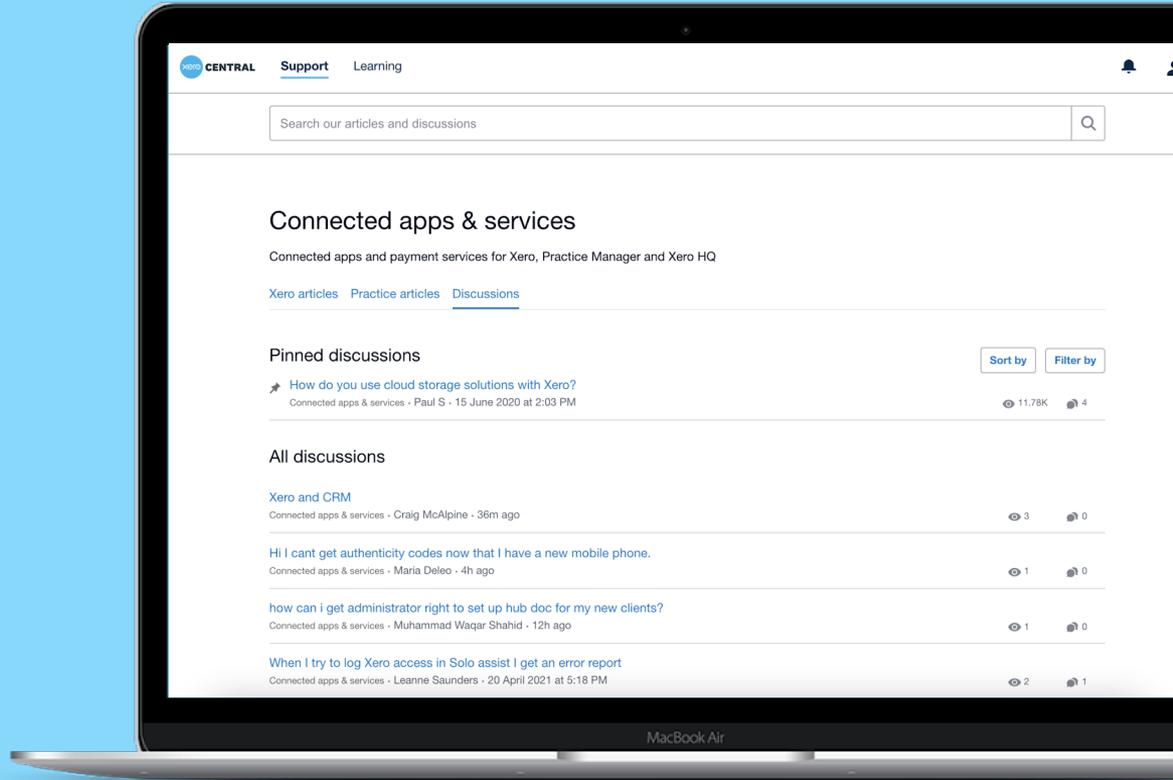
Xero resources



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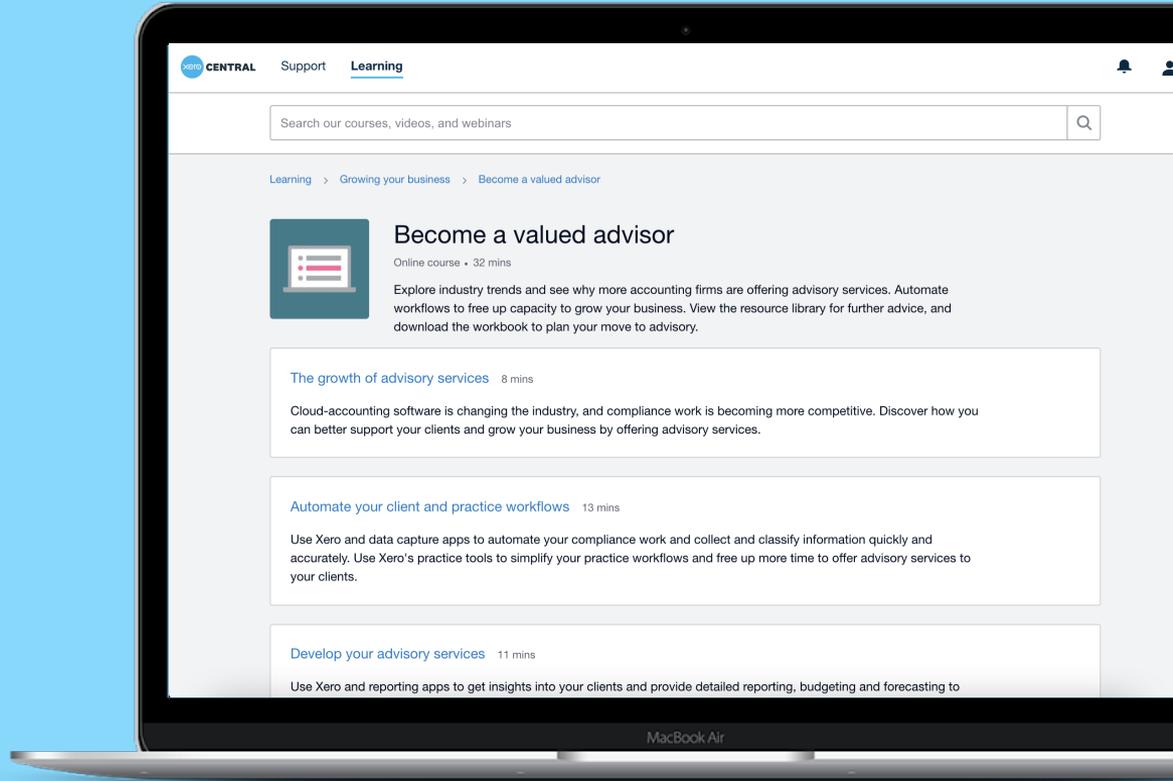
Xero Central discussions

Let's take a look



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Become a valued advisor course



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App playbook series

Download app
playbook



Get started on your app advisory journey

Xero's [app marketplace](#) features 800+ apps that integrate with Xero to help your clients reach their goals. With so many options, it can be hard to know where to begin. Find out how to get started and identify apps that meet the common needs and pain points of businesses in specific industries.

App advisory playbook

Learn what app advisory is and how to get going, knowing that you're recommending the right apps.

[Get the playbook \(PDF 3.4MB\)](#)

Cash flow playbook

Set your clients on the path to success by improving their cash flow with the right mix of apps.

[Get the playbook \(PDF 3.4MB\)](#)



Industry playbooks

Trade and construction app playbook

Identify the best trade and construction apps, from job and project management to payroll, for your clients.

[Get the playbook \(PDF 4.3MB\)](#)

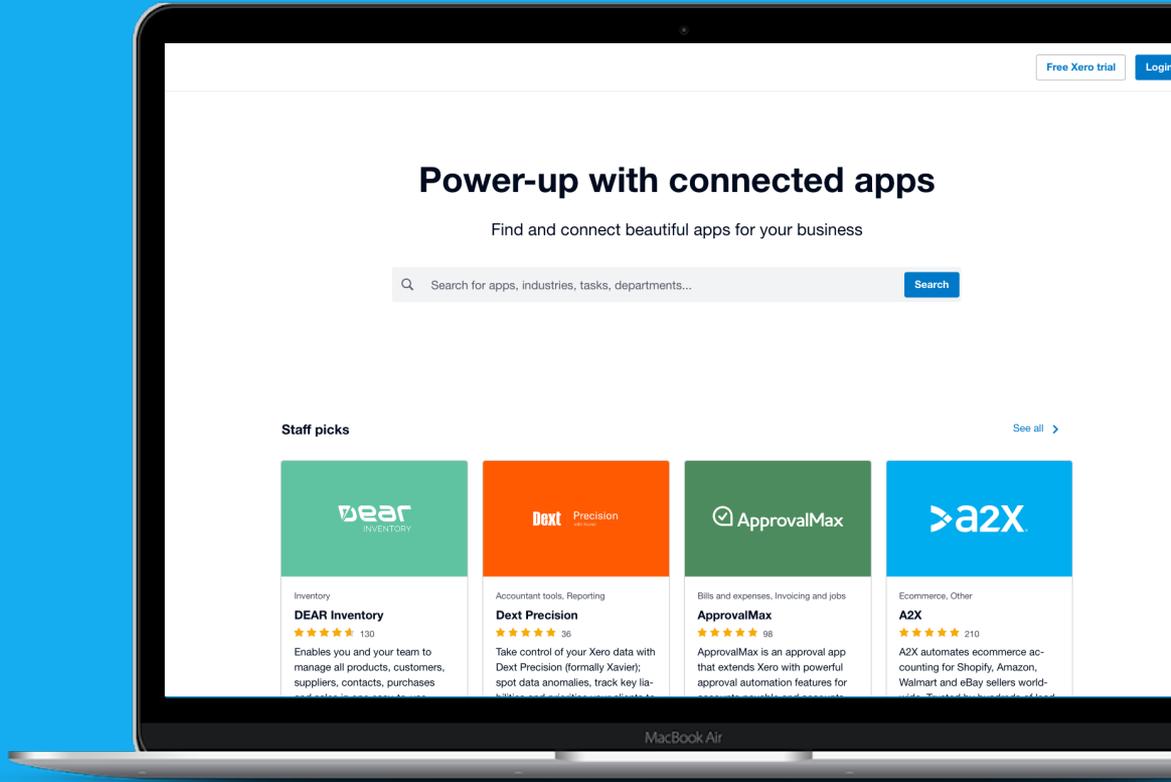


MacBook Air

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Xero app marketplace

Check out app
marketplace



Free Xero trial

Login

Power-up with connected apps

Find and connect beautiful apps for your business

Q Search for apps, industries, tasks, departments...

Search

Staff picks

See all >

DEAR
INVENTORY

Inventory

DEAR Inventory

★★★★★ 130

Enables you and your team to manage all products, customers, suppliers, contacts, purchases

Dext Precision

Accountant tools, Reporting

Dext Precision

★★★★★ 36

Take control of your Xero data with Dext Precision (formerly Xavier); spot data anomalies, track key lia-

ApprovalMax

Bills and expenses, Invoicing and jobs

ApprovalMax

★★★★★ 98

ApprovalMax is an approval app that extends Xero with powerful approval automation features for

a2X

Ecommerce, Other

A2X

★★★★★ 210

A2X automates ecommerce accounting for Shopify, Amazon, Walmart and eBay sellers world-

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Some parting tips

Cultivate champions and encourage expertise

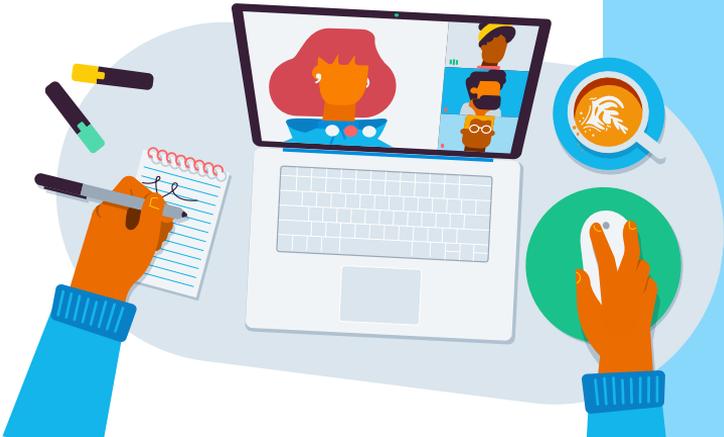
Profile your client landscape

Gauge appetite for change

Scope robustly

Build an app stack

Learn through success AND failure



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small business**



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**If you're from an
accounting practice**



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