

XERO

Overview:

We aim to educate and support you on how to get more out of your Xero accounting package. CMK will take the time to get to know you and understand what it is you want and need moving forward. You will have an initial meet and greet (free of charge), to see if there is a mutual connection formed and if we can work together to help you move forward to understand your business and Xero training needs.

Content:

Initial meet and greet:

Forming a working relationship
Understanding your wants and needs

The workshop sessions will be focused on:

Workshop 1:

Getting started in Xero / Reviewing your current Xero set up
Coaching to develop a better understanding of the different user roles available
Coaching to develop a better understanding of transaction types
Coaching to develop a better understanding of how to complete a bank reconciliation

Workshop 2:

Coaching to develop a better understanding of how to generate invoices, monthly statements and managing your debtors
Coaching to develop a better understanding of how to create your GST return and how to manage your fixed assets

Workshop 3:

Coaching to develop a better understanding of what reports are available and how to use these, along with creating customised reports
Coaching to develop a better understanding of how to set up a budget and use tracking features

Client Benefits / Value:

Provision of resources such as helping to create invoice templates and training materials.
Email and phone support available between coaching sessions.

Duration (sessions / hours):

Free 1 hour initial set up meeting to determine areas to be discussed and addressed.
Followed by 3 workshops (totaling between 4-6 hours)

Cost:

Initial 1 hour \$Free
3 workshops between 4-6 hours, \$1,200 - \$1,800 (\$400 - \$600 per session, to be invoiced per session)
All costs excluding GST (\$NZD)

Follow up sessions may be required. To be determined by the individual and CMK.

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