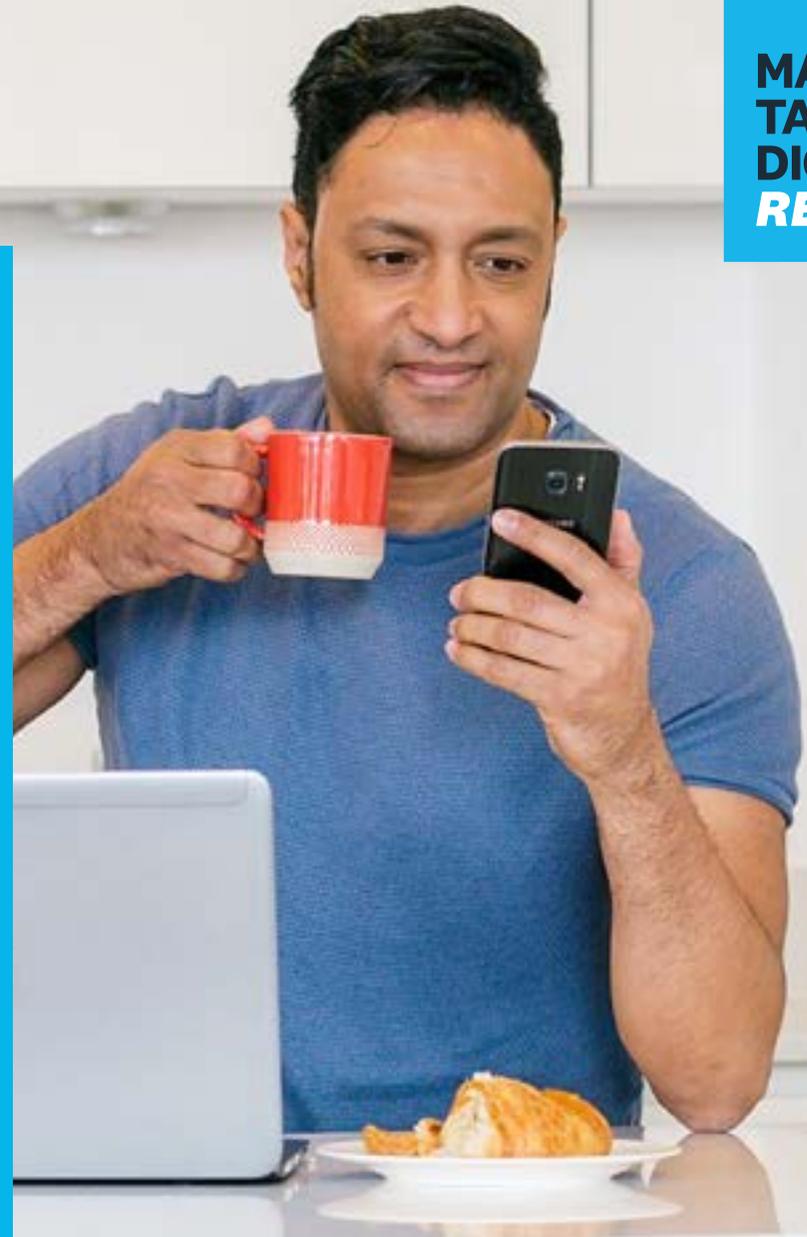


**MAKING
TAX
DIGITAL
READY**

Making Tax Digital:

**A communications toolkit
for your practice**

Getting your practice and clients ready for MTD



Beautiful business

xero

Setting the scene

There's been a lot of debate and discussion on the topic of Making Tax Digital (MTD), but HMRC has now confirmed that MTD for business will become mandatory, beginning with MTD for VAT from 1 April 2019.

Who is affected on 1 April 2019?

All UK businesses that are VAT registered and above the £85,000 VAT threshold will be required to keep their records digitally and submit VAT returns to HMRC using MTD-compatible software. Other areas of MTD, such as Income tax and Corporation tax, have been put on hold until 2020 at the earliest.

What if my clients are already using Xero?

If you're already using Xero to submit your or your clients' VAT returns, you don't need to do anything. All Xero subscriptions supporting the submission of a VAT return will be updated for MTDfb VAT returns.

If you or your clients are already using one of our Xero business edition subscriptions, or Xero VAT Cashbook, there's nothing you need to do just yet.

What do I need to do next?

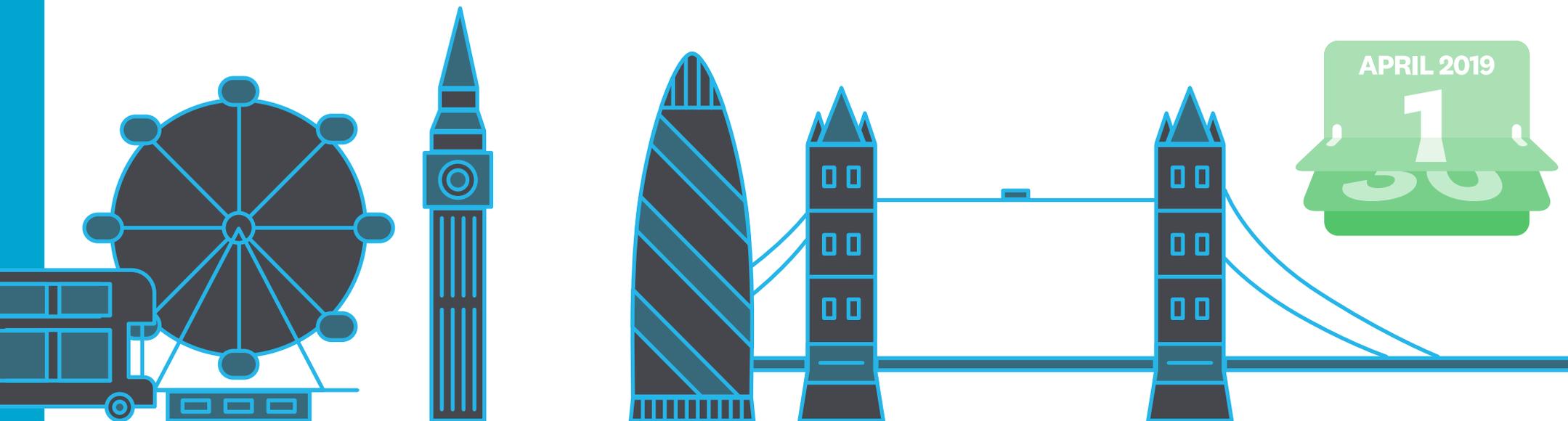
For the rest of your VAT registered clients above the VAT threshold, you'll need to review their current systems. So it's a great time to move to modern, cloud-based, MTD compatible software.

About this toolkit

We've built this toolkit to help you communicate the change with your clients, so you can make sure they're MTD-ready with minimal fuss, well ahead of the deadline.

In this toolkit, you'll find guidance and resources to help you with your marketing and communications strategy, including:

- Why Xero for Making Tax Digital?
- Getting your team up to speed
- Communicating MTD and Xero to your clients
- Hosting an MTD event



Why Xero for Making Tax Digital?

Xero is the UK's leading online accounting platform – named **Britain's Best Small Business Accounting Software by Accountancy Age** – as well as being awarded more accolades than any other online accounting software provider.



Founded in 2006, Xero was born in the cloud for the cloud, with more than **300,000 UK small business subscribers** and **over one million worldwide**.

Xero has everything your clients need to run their business:



Send professional-looking purchase orders, quotes and invoices



Match incomings and outgoings automatically to accounts and bank statements



Send and receive payments, capture expenses and manage stock



Integrated payroll, project management and expense claim functionality



With **unlimited users**, clients can add you – their advisor – or other business users without incurring additional fees, allowing you and your clients to manage the accounts faster, more efficiently and with fewer errors.

What's more, we'll roll out Xero's MTD for VAT functionality automatically – **with no additional fees and no extra work for you or your clients**.



Invoicing



Payroll



Two Factor Authentication



Expenses



Mobile app



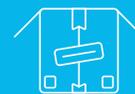
Direct bank connections



Bill payments



Project management



Inventory



Bank reconciliations



Online VAT submissions

Getting your team up to speed

Making sure your team is fully up to speed on Making Tax Digital is key to your firm's success. Are staff members able to answer those tricky client questions? Have you thought of all the scenarios and your response to them to give your clients peace of mind?

Creating FAQs for your practice staff

If you've received questions about MTD from your clients, consider recording them in a single document along with your firm's agreed responses. FAQs help your team to remain on message and will streamline the client experience.

We've created our own FAQ sheet internally at Xero to help us respond to our subscribers, and many of those questions have been published on our blog to help you get answers quickly.

[Read our MTD FAQ blog](#)

Utilise the resources already available

Xero Making Tax Digital resource centre

We've developed a Making Tax Digital resource centre which we'll update with resources and information to support and inform your practice and clients on the journey towards MTD.

[See Xero's MTD resource centre](#)

HMRC guidance and resources

HMRC has published guidance on Making Tax Digital for Business, providing context, clarification on who will be affected and when, what it means for businesses and the impacts it will have. It's important that your team is well-versed in these updates, and you can use it to form your FAQ responses.

[See HMRC's MTDfb guidance](#)

Sign up to Xero & HMRC webinars

There'll be progress updates from HMRC and Xero in the lead up to the MTD deadline. Keep an eye on social media and your emails to find out when webinars are running. This is a great way for your team to keep up with updates as they become available, giving your team the right information at the right time to share with your clients.

Plus we'll keep our Making Tax Digital resource centre updated so you can register for upcoming webinars, or watch any you may have missed.

[See Xero's MTD training resources](#)

Additional training

Aside from MTD-specific material, ensure that your team is fully skilled-up on your firm's software of choice, as well as best practice for converting spreadsheet and desktop clients to online accounting.

Xero's MTD learning journey

Our brand new learning journey will help your team get up to speed on the latest in Making Tax Digital.

It includes Xero migration certification, which is the perfect course for helping you and your team get up to speed with client segmentation and migration.

Plus, you'll get access to Xero's MTD-ready badge on the advisor directory.

[Find out more](#)

Communicating to your clients

You only have until 1 April 2019 to make sure your VAT-registered clients are set up and ready with MTD-compatible software. If you haven't already, we recommend getting started with your migration as soon as possible to lessen the stress come March.

Make sure you're communicating the change to your clients well ahead of time.

Segmenting your audience

Start by segmenting your audience. Splitting your clients into groups helps you to tailor your message one group at a time to make sure you're sharing the right information at the right time.

[Xero migration certification](#) includes best practice for segmenting your clients so you have a clear idea of your migration process – and it helps with your communication plans too.

To get you started, think about segmenting your VAT clients since they'll be affected by MTD first – then split them out:

Mapping your message

Once you've segmented your audience, consider the different messages you need to communicate to each audience and when.

For example, your MTD clients that are already using Xero to submit VAT returns won't need to change software, so you can let them know they have nothing to worry about. They will also benefit from no upgrade fees with as little impact as possible.

Begin by drawing a flowchart of each audience, how many clients are affected in each, and note down the specific message you need to share with each audience. You can then decide how you'll communicate to that audience.

What software are you using to manage client accounts right now?

- a. Xero online accounting software
 - i. VAT-compatible plan (VAT Cashbook or Business Edition)
 - ii. Not VAT-compatible plan (Ledger or Cashbook)
- b. Spreadsheets
- c. Sage desktop
- d. Quickbooks desktop
- e. Quickbooks Online
- f. Other online accounting software

Are they above the VAT threshold?

When is their VAT period-end?



Communicating to your clients...continued

Here are some points to consider:

The number of clients in each group

If the number is small, a personal phone call from a client manager might suffice, followed by an email or letter to clarify your message. If the message is larger, you might like to first send an email or letter to let clients know next steps – and perhaps invite them to contact your team directly to find out more, register for a webinar or attend an event you're hosting.

Your clients' preferred channels

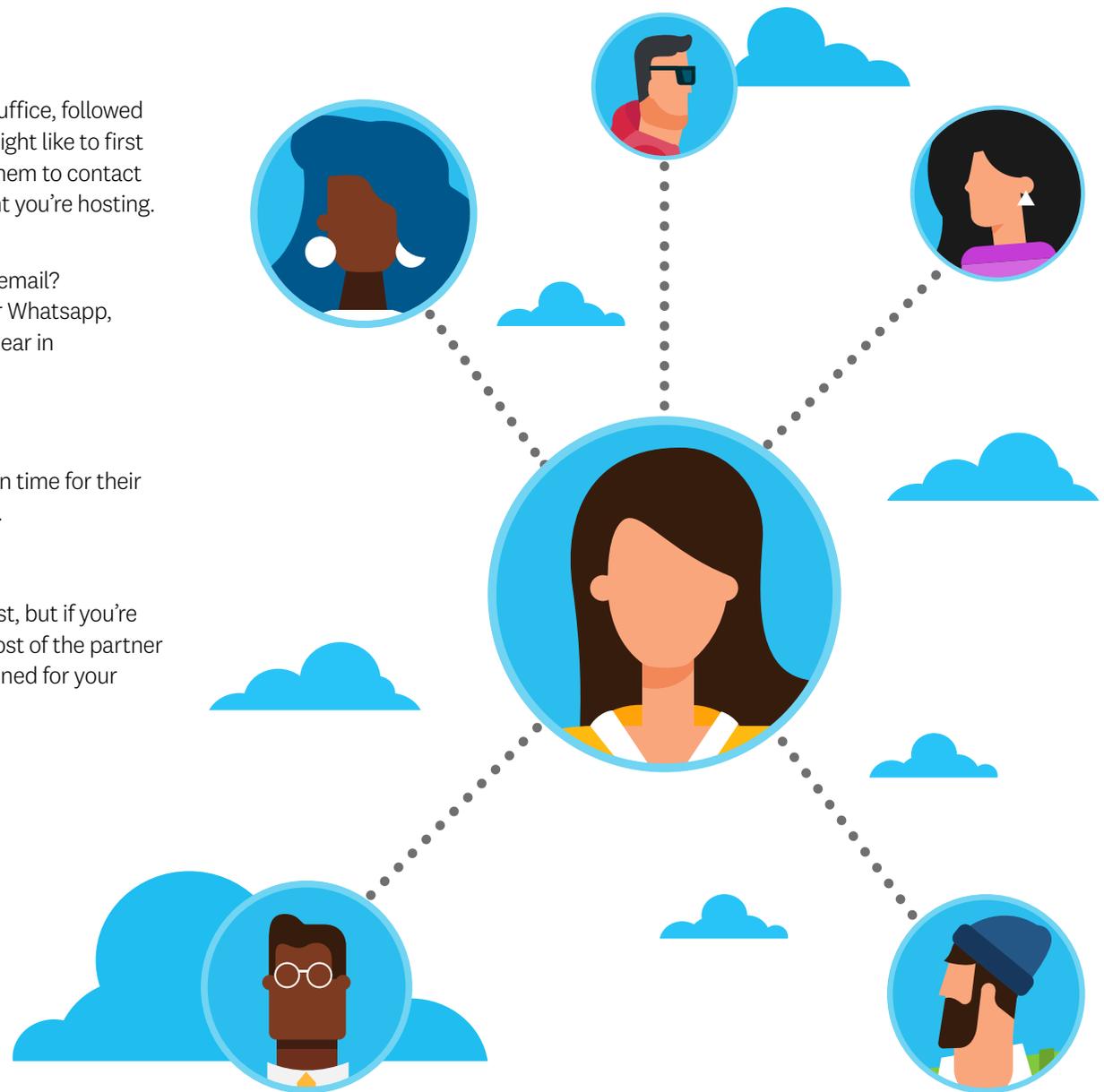
How do you communicate with clients? Do they prefer to receive letters or email? Or do you use private channels to communicate with them such as Slack or Whatsapp, or a Facebook or LinkedIn group? Maybe it's a mixture. Whatever you use, bear in mind the mediums your clients like to receive information when planning your communications.

Prioritise – when do your clients need to know?

Some clients will be simpler to migrate than others or may need migrating in time for their current VAT period-end for each audience based on your clients' year ends.

Managing an increase in subscription costs

It's up to you whether you pass on or absorb the additional subscription cost, but if you're upgrading clients' subscriptions, we generally recommend absorbing the cost of the partner edition subscription into your client fee. The time saved and efficiencies gained for your practice will far outweigh the cost of the subscription.



Example communication flowchart

Clients VAT-registered and above the VAT threshold (high priority)

Xero

VAT Cashbook or Business Edition

“You’ll have to submit VAT returns for MTD, but you’re already using MTD-compatible software. There’s nothing more you need to do right now.”

Ledger or Cashbook

“We’ll need to upgrade you to VAT Cashbook or a Xero Business Edition plan so you can submit VAT returns. It’s easy – just the click of a button and a small increase in your monthly subscription fee. Let us get that sorted for you.”

Spreadsheets

“You’ll have to submit VAT returns starting April 2019, so we’ll need to get your accounts into Xero ASAP. Don’t worry, it’ll make managing your finances so much easier. Join our Xero demo to learn more and book a time with us to get your accounts converted.”

Desktop software

“You’ll have to submit returns, so we’d like to switch your accounts to Xero online accounting software – this will avoid you having to fork out for expensive desktop software upgrades. Plus there are so many other great benefits to moving your accounts online! Join our Xero demo to learn more and book a time with us to get your accounts converted.”

Other cloud-based software

“You’ll need to submit VAT returns, but you can stay on your current software as long as the provider has confirmed it’ll be MTD-compatible. Or you could switch to Xero, our preferred online accounting platform. Get in touch if you want to find out more.”

non-Xero

Clients VAT-registered and below the VAT threshold (lower priority)

Xero

“Submitting MTD VAT is optional for you right now, but as long as you’re using Xero VAT Cashbook or a Xero Business Edition plan, you’re MTD-ready!”

non-Xero

“Submitting MTD VAT is optional for your business – but we should talk about switching you to Xero soon in preparation for April 2020.”

Clients already using Xero to submit VAT

Businesses already using Xero to submit their VAT returns have nothing to worry about. We'll automatically upgrade Xero's VAT functionality so your clients will be using MTD-compatible software come 1 April 2019 – and there are no upgrade fees.

There's nothing more that you or they have to do, but we recommend you let clients know they're MTD-ready. Not only will it be great news for any business wondering, it also gives them the opportunity to come back to you with questions if they have any.

Email/letter template: VAT clients already on Xero

New Message

Hi [\[CLIENT NAME\]](#),

The Making Tax Digital (MTD) for VAT deadline is getting closer. From 1 April 2019, all VAT-registered UK businesses above the £85,000 VAT threshold will need to keep records digitally and submit VAT returns to HMRC using MTD-compatible software. Over the coming months, we'll be working to make sure all of our clients are on the right software and ready for MTD.

You're MTD-ready

The great news is there's nothing you need to do, because [\[CLIENT BUSINESS NAME\]](#)'s accounts are already on Xero, the UK's leading online accounting platform.

The team at Xero have been busy building their MTD functionality and are working closely with HMRC to have it ready in time for April 2019. Once the functionality is ready, the team at [\[PRACTICE NAME\]](#) will work with Xero to ensure we're well-equipped to support you with your MTD compliance.

Want to know more?

If you have any questions about Xero or Making Tax Digital, please don't hesitate to get in touch. We'd love to hear from you.

Clients using Xero Ledger or Cashbook

If your VAT-registered clients above the VAT threshold are using Xero Ledger or Cashbook partner edition plans, you'll need to upgrade their subscription to VAT Cashbook or a Xero business edition plan before 1 April 2019 to ensure they comply with MTD.

You can upgrade clients with just the click of a button inside Xero HQ.

Option 1: Manage client VAT returns with VAT Cashbook

VAT Cashbook is a simple upgrade which allows you to continue managing your clients' accounts, with the added functionality of generating VAT returns from inside Xero.

Option 2: Empower your clients with Xero business edition

If your clients would like to be more engaged with their finances, why not encourage them to use one of our Xero business edition plans where they can experience the full benefits of using Xero? Our business edition plans provide a tonne of great features for businesses, including sales invoicing, getting paid faster by accepting payments online and a real-time view of their cash flow with Xero's dashboard.

Either way, you'll need to let your clients know about the change.

Email/letter template: VAT clients using Xero Ledger or Cashbook

New Message

Hi [CLIENT NAME],

The Making Tax Digital (MTD) deadline is getting closer. From 1 April 2019, all VAT-registered UK businesses above the £85,000 VAT threshold will need to keep records digitally and submit VAT returns to HMRC using MTD-compatible software. Over the coming months, we'll be working to make sure all of our clients are on the right software and ready for MTD.

Getting your business ready with Xero

The team at Xero have been busy building their MTD functionality and are working closely with HMRC to have it ready for the April 2019 deadline.

As a Xero [STATUS] partner, [PRACTICE NAME] has chosen Xero as our online accounting platform of choice – so we're already managing [CLIENT BUSINESS NAME]'s accounts through Xero. Your accounts are currently on a plan that doesn't allow quarterly VAT submissions. There are a couple of options we can take to help get you MTD-ready:

We can do it for you: As a Xero partner, we can continue managing your accounts for you. It's simple for us to upgrade you to Xero's VAT Cashbook plan and we'll be able to submit VAT returns for you ready for MTD in April.

Get more involved with your finances: Many of our clients love using Xero to manage their own bookkeeping, and you can too. We can upgrade you to one of Xero's business edition plans so you can send sales invoices from Xero, accept payments online to get paid faster, and get a real-time view of your cash flow with Xero's dashboard.

Why Xero?

More than 300,000 subscribers across the UK and more than one million subscribers around the world do beautiful business with Xero. Xero helps businesses save time on admin and get paid faster. You can login anytime on your PC, Mac, tablet or smartphone and see up to date financials. And we can do the same, which means we're able to advise you based on real-time, up-to-date financial information.

Contact us

We'd love to chat through your options, so please get in touch soon to arrange a time to speak. We'd love to hear from you.

Internal VAT clients: A quick-win

Beginning with your internal clients can be a great place to start to get your team well and truly skilled up on the migration process and using Xero – and it's an easy win for your communication plan too.

If your internal VAT clients won't be using the software themselves, all you need to do is reassure them that you've got things covered – you'll migrate them to Xero and they'll be MTD-compliant come 1 April 2019.

Xero migration certification will also guide you through the conversion process, helping you to understand the tools and resources, like Movemybooks, AdvanceTrack and Data Dear, to transition your clients on to Xero.

Email/letter template: Internal VAT clients

New Message

Hi [\[CLIENT NAME\]](#),

The Making Tax Digital (MTD) for VAT deadline is getting closer. From 1 April 2019, all UK businesses above the £85,000 VAT threshold will need to keep records digitally and submit VAT returns to HMRC using MTD-compatible software. Over the coming months, we'll be working to make sure all of our clients are on the right software and ready for MTD.

Getting your business ready with Xero

To get your business ready for Making Tax Digital, we'll be converting [\[CLIENT BUSINESS NAME\]](#)'s accounts to Xero, the UK's leading online accounting platform.

The team at Xero have been busy building their MTD functionality and are working closely with HMRC to have it ready well in time for April 2019. Once the functionality is ready, the team at [\[PRACTICE NAME\]](#) will work with Xero to ensure we're well-equipped to support you with your MTD compliance.

Why Xero?

[\[PRACTICE NAME\]](#) has chosen to partner with Xero as our online accounting platform of choice. More than 300,000 subscribers across the UK and more than one million subscribers around the world use and love Xero.

Xero helps businesses save time on admin and get paid faster. You can login anytime on your PC, Mac, tablet or smartphone and see up to date financials. And we can do the same, which means we're able to advise you based on real-time, up-to-date financial information.

Want to know more?

If you have any questions about Xero or Making Tax Digital, please don't hesitate to get in touch. We'd love to hear from you.

Moving clients to Xero from spreadsheets

Switching your clients to Xero from spreadsheets isn't just a good idea because of Making Tax Digital. It'll also save you and your clients time from manual data entry, or worrying about clunky formulas and mistakes that are too easy to make.

Moving your clients from spreadsheets to Xero will mean tasks that took hours now happen with a few clicks. Here's more on why Xero trumps spreadsheets:

Provide a dashboard of key financials:

Check bank balances, invoices, bills and expense claims in real-time all in a single glance.

Send invoices, payments and VAT returns:

Update invoices, payments and pay runs directly from Xero.

Sync bank statements automatically:

Connect bank accounts to Xero to automatically download statements and match them to business accounts.

Send the right data to the taxman:

Let Xero calculate your VAT return and payroll submissions automatically and save you hours of number crunching.

Save you from the shoebox:

Say goodbye to the dreaded box of receipts. Simply scan and import documents, and link them directly to a given project in Xero.

Hit the road:

Help clients manage business on the go. File expense reports and complete other tasks with the Xero mobile app.

Email/letter template: Internal VAT clients

New Message

Hi [CLIENT NAME],

The Making Tax Digital (MTD) for VAT deadline is getting closer. From 1 April 2019, all UK businesses above the £85,000 VAT threshold will need to keep records digitally and submit VAT returns to HMRC using MTD-compatible software.

Getting your business ready with Xero

To comply with HMRC's new regulation, we'll need to move your accounts off spreadsheets and onto Xero online accounting software. With Xero, your accounts will be secured safely and securely in the cloud and you'll be able to easily submit quarterly VAT returns directly to HMRC.

Over the coming weeks and months, [PRACTICE NAME] will be working to transition all our clients to Xero, the UK's leading online accounting software. We're really excited to get you set up, because Xero comes with so many more benefits than just being MTD compliant – and, we'll be able to provide you with a much greater experience.

Why Xero?

More than 300,000 subscribers across the UK and more than one million around the world use and love Xero because you can:

- **Automate calculations:** Stop worrying about complicated formulas. Let Xero do the sums automatically so we can focus our time providing you with the right advice at the right time.
- **View your key financials:** Check your bank balances, invoices, bills and expense claims in real-time
- **Bring your team together:** Add as many users as you like and we can work on the same data at the same time
- **Sync bank statements:** Use direct banks to connect your bank account to Xero for quick and easy reconciliation
- **Submit the right data:** Be MTD-ready and easily submit your quarterly returns through MTD-compatible software
- **Feel safe and secure:** Rest easy, knowing that Xero provides multiple layers of data protection

Want to know more?

If you have any questions about Xero or Making Tax Digital, please don't hesitate to get in touch. We'd love to hear from you.

Moving clients to Xero from desktop software

It's time to leave frustrating, expensive, pre-internet software behind. Hundreds of businesses move from desktop to online accounting software every month, and its becoming even more important as Making Tax Digital for business looms.

Xero is the best accounting software for every modern business. Here's what you can tell your desktop clients when you're moving them to Xero:

Manage your cashflow: Invoice customers on the go, pay bills and staff, and see cashflow in real time.

Take payment directly from your invoice: Provide easy payment options right from your invoice, and get paid.

Manage your accounts from any device: Check balances and transactions, upload receipts, invoice customers and manage timesheets – from any device, anywhere.

Unlimited user access for free: Work more efficiently with more of your team logged in.

Direct feeds with leading UK banks: Reliable & fast feeds directly with leading UK banks, rather than via a third party.

Create the perfect solution for you: Connect with over 700 apps so you can manage, so you can manage your accounts your way.

No hidden fees: Xero has no hidden charges, not even for VAT returns updates.

Data stored securely in the cloud: Your data is stored behind multiple layers of security, so you don't have to worry about losing data.

Email/letter template: Internal VAT clients

New Message

Hi [CLIENT NAME],

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- **Bring your team together:** Add as many users as you like and we can work on the same data at the same time
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- **Submit the right data:** Be MTD-ready and easily submit your quarterly returns through MTD-compatible software
- **Feel safe and secure:** Rest easy, knowing that Xero provides multiple layers of data protection

Want to know more?

If you have any questions about Xero or Making Tax Digital, please don't hesitate to get in touch. We'd love to hear from you.



**Don't forget,
you can move
2 years worth
of client data**
from Sage or Quickbooks
desktop for **free with
Movemybooks.**

Hosting an MTD event

Events are a great way to build stronger relationships with clients and help to educate them en masse about Making Tax Digital. They allow you to connect with people on a level you can't achieve online or over the phone, and the face-to-face interaction helps to hold people's attention.

So how do you get people to come along and ensure you get a return on your investment?

Before you start

- What are you trying to achieve?
- What message do you want to deliver?
- Is there an action you'd like attendees to take?
- How will you make sure they take action?

Think about the results you want to achieve – whether it's making sure clients understand why they need to move online so they can get ready for MTD, or if they're ready to go and just need some education on how to use Xero.

Choosing the right time and place

Timing matters. Your clients are busy and more likely to attend an event that doesn't disrupt their schedules. The day of week and time of day are important:

Target the:

- Middle of the week
(Tuesday, Wednesday, Thursday)
- Beginning or end of the day
(breakfast or happy hour)

Try to choose a venue that doesn't require guests to commute too far or through difficult traffic. Your office might work if it's a central location, but make sure it's fit for purpose and set up in a way that creates a bit of excitement. Otherwise a local hotel will likely have conference rooms for hire that come with audio-visual (AV) equipment, seating and catering.

Inviting your clients

Your Xero segmentation should help you to gather a list of prospective attendees. Once you have a list together, create your invitation. It could be as simple as text in an email that links to an Eventbrite page, or if you have access to design resources, you could have one designed specifically.

Event websites like Eventbrite are useful tools for tracking registrations. And most are free as long as you're not charging for tickets.

Email/letter template: Event invitation

New Message

Hi [\[CLIENT NAME\]](#),

The Making Tax Digital (MTD) for VAT deadline is getting closer. From 1 April 2019, all UK businesses above the £85,000 VAT threshold will need to keep records digitally and submit VAT returns to HMRC using MTD-compatible software. Over the coming months, we'll be working to make sure all of our clients are on the right software and ready for MTD.

You're invited to our free event

Join us at our free MTD event where we'll share everything you need to know to get your business ready with Xero, the UK's leading online accounting platform and [\[PRACTICE NAME\]'s](#) platform of choice. You'll also hear from a business owner who has switched to Xero and is now ready for Making Tax Digital when it comes into effect in April.

Why Xero?

[\[PRACTICE NAME\]](#) has chosen to partner with Xero as our online accounting platform of choice. More than 300,000 subscribers across the UK and more than one million subscribers around the world use and love Xero.

Xero helps businesses save time on admin and get paid faster. You can login anytime on your PC, Mac, tablet or smartphone and see up to date financials. And we can do the same, which means we're able to advise you based on real-time, up-to-date financial information.

Got questions? Please don't hesitate to get in touch.

Reserve your space

Presentation and content

We recommend setting the scene by providing an overview of Making Tax Digital, who it will effect and why it's something your clients need to be aware of.

You'll then want to talk about how your practice will be approaching MTD for your clients so they are well aware of next steps and what's expected of them.

Running a Xero presentation and demo is a great way to help your clients understand how online accounting software can really help them. Highlight the key features and benefits that they'll love, such as:

- Unlimited users and no upgrade fees for MTD functionality
- Save time with automatic bank feeds for easy bank reconciliation
- Get paid faster with online invoicing and payments
- Choose from more than 650 connected apps that meet their business needs
- See a real-time view of your finances to enable up-to-date advice
- View the same data as your accountant from anywhere at anytime

Take your clients through a live demo of Xero so they can see just how simple it is. Need help? Check out our course: [How to position MTD for your clients](#) which includes advice on how to demo Xero.

Making the best use of technology

AV is a big help in presenting information, but it can also be your enemy. While it's a common occurrence, it's never a good look when you have to fix a malfunction during your talk. If using slides, keep them to a minimum. Only have a few words or simple images on them. Keep the type big so everyone can read them.

Tech tips

- Do a test run before the real deal. It'll help iron out glitches.
- If giving a demo on a computer, hardwire the internet rather than relying on WiFi. If you have to be on WiFi, try a connection that is only being used by you.
- Keep a copy of your presentation on the desktop of your computer to protect against potential WiFi issues.

Hospitality and entertainment

Hungry or thirsty guests won't focus on your message, so provide some food and drinks. The setup doesn't have to be elaborate, but the courtesy is important.

Telling client stories

Helping clients to see how your other businesses are using Xero and are MTD-ready is a great way to demonstrate to others why they shouldn't be worried about the change. Here are a few ways you could do it:

- **A client guest speaker:** If the client is confident, a good-speaker and understands how to present their story effectively, this could be powerful for other clients
- **A client panel:** Interview one to three clients on stage who are already running their accounts online and ask them about their experiences – what they love about the software, what it allows them to do instead, etc.
- **A case study video:** Playing a video means you don't have to rely on a client to attend your event, you can produce it in advance and it can be used in a variety of ways – including on your website and social media. Plus it means you can make sure your message is just as you want it to be.

Networking and one-to-one demos

After your presentation, provide some networking time for clients to ask questions. We recommend having your Xero-certified staff available afterwards to show the product in greater detail and start the conversation about getting set up. Having a space with seats, tables and laptops for one to one demos can be a nice touch.

Keep the momentum going

You'll then want to make sure you leave your clients with a call to action. What do they need to do next? How are you going to follow up? Let them know you'll be in touch to get them transitioned to Xero, or ask them to touch base with you at a time that suits them. Have a schedule available so they can choose a time to book in with you then and there.

And most importantly, make sure they're clear if MTD will effect them in April 2019, and that you'll help them to be compliant.

MTD events shouldn't be hard

You can hold something that's intimate, informative and fun with relatively little cost and stress. Most marketers agree it's worth the effort.

Just make sure you know what you want out of it – and create a strategy for getting there. It's all about keeping it simple and following up.

Beautiful business

