

# Foundations: Simplify

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STEP  
01



## Onboarding

This might not be the most exciting part, but we'll make it as easy and simple as possible. Once it's set up, we can focus on the really interesting part: your business!

STEP  
02



## Xero Checks

Just like a car needs a MOT, your financial data needs a regular check-up too. We will make sure your Xero accurately represents your business's financial health.

STEP  
03



## Month end procedures

When we say "simplify," we mean making something less complicated so it's easier to do or understand. And that's why we have these month-end procedures - to make things easier for you in the long run!

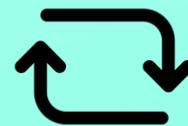
STEP  
04



## Income and Expenses

This is a deep dive into your Xero's income and expense categories. It will be a blueprint for your 'Get Clarity' and 'Grow' stages.

STEP  
05



## Repeat

As your business grows, your processes, procedures, and business ecosystem will also expand. We'll keep reviewing and suggesting ways to simplify your processes, so you can focus on what you do best - running your business.

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Let Us Help you to Simplify, Get Clarity & Grow!

# The Whole Picture: Get Clarity

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STEP  
**01**



## Weekly Dashboard

Think of it like your car's dashboard. While driving, it's vital to have a clear view of your speed, fuel level, and engine warnings. Together we will create a dashboard with up to 10 key indicators so you always know your business is moving forward.

STEP  
**02**



## Deep Dive Xero Reports

With all the hard work done and the data gathered, it's time to evaluate, plan, and uncover valuable insights. We'll guide you on where to look and what to look for in Xero, helping you see the whole picture with ease!

STEP  
**03**



## Cash Flow explained

Cash flow is the fuel of your engine. Together, we'll analyze your income, expenses, and profits to ensure you have a healthy cash flow.

STEP  
**04**



## Importance of Credit Control

Your bank balance depends on the money collected - you did the work so you deserve to be paid, on time every time!

STEP  
**05**



## Monthly/Quarterly calls

In our clarity calls, we'll review past performance and plan for the coming weeks. We'll explore what works, and how to build upon it for greater success. And of course, we're here to listen and support you in staying motivated and on track with your goals.

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Let Us Help you to Simplify, Get Clarity & Grow!

# Road Ahead: Grow

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STEP  
**01**



## Goal Setting

Without a clear direction, how can you recognize when you've arrived at your goal? Allow us to be the sounding board for your aspirations.

STEP  
**02**



## Budgets & Forecasts

Your goals become a plan when we sit together and create budgets and forecasts. This will be your plan for the road ahead.

STEP  
**03**



## Accountability

It's kind of like driving a car - you'd use a map to make sure you're still on track to your destination, right? Our accountability meeting will serve the same purpose - keeping the business on the right path!

STEP  
**04**



## Year End meeting

Before your financial year ends, we'll have a friendly catch-up for a tax planning meeting.

STEP  
**05**



## Next year Planning

We not stopping here! Now is the perfect time to start planning for the year ahead. You'll gain even more insight into your business, be better prepared for upcoming challenges, and we'll work together to review your goals and create new budgets and forecasts.

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