

**XBert** 



**CASE  
STUDY**

We love perfect  
and XBert helps  
us **do things faster**  
and know it's right!

XBert is vital to our integrity  
portfolio to deliver a high standard  
of service and create meaningful  
value for clients.



**They say you can't improve on perfection, but when Diane McCaffrey met XBert, that's exactly what happened. Diane and her team from bookkeeping practice BYO Group love perfect. Since implementing XBert, they've freed up hours each day and have more confidence in the data. The time previously spent manually checking "walls of data" is now used for advisory.**

A business can only be as good as the data they're using. Accurate and up-to-date information is crucial, and data integrity is the bedrock for BYO Group.

With XBert's AI-powered bookkeeping process automation and audits surfacing issues, Diane and her team know they can rely on the quality of the data and insights. The value and efficiencies gained from XBert mean the solution is now included on all proposals sent to clients.

Diane, the founder of Melbourne's BYO Group, is a proud and passionate bookkeeper and a long-time member of the Institute of Certified Bookkeepers (ICB). BYO Group is a Xero Gold Champion Partner, certified Xero advisor and trainer, and is an ICB Certified Bookkeeping Practice.

Diane has over 20 years of experience as a transactional-based accountant. She studied Accounting and Business Studies and has held a range of senior positions in private companies. BYO Books started as a sole trader, and in 2009 became a team operation and BYO Group.

***XBert blew me away with how quickly it picked up issues and inconsistencies. The automated ABN and GST checks are gold!***

BYO Group is dedicated to providing bespoke, innovative and technology-driven solutions for clients and covers everything from payroll and compliance through to detailed business analysis. Their clients are a diverse bunch and include people from the creative, IT, legal, health and allied health, manufacturing and engineering fields.

The Australian and internationally-based team at BYO Group is a mix of full-time and part-time bookkeeping professionals, all with accounting qualifications. There are two part-time university students in their final year of accountancy study as Diane is a firm believer in training the future workforce, and also little Tango whose role is keeping watch and tail wagging.

Diane is uncompromising in ensuring data integrity, guaranteeing deadlines, maintaining clients' trust, and a tailored, collaborative approach. XBert has become vital to BYO Group's integrity portfolio so they can continue to have their "eye on the ball at all times".

Often what you need comes when you least expect it. Diane wasn't looking for a data integrity or productivity solution when she first heard about XBert from some fellow tech-loving, app-appreciating peers. However, XBert kept popping up in conversation as an innovative tool worthy of exploration.

Diane's interest was piqued, but she also has strict criteria before adding any new tool to her practice's technology stack. It has to be intuitive and straightforward for staff to use, hassle-free to implement, deliver on its promise and provide substantial value.

After talking to XBert co-founder Troy Brown at Xerocon, she was ready to see for herself what all the buzz was about.

Diane is thrilled she made the move to XBert.

**We love perfect, and with XBert we can enhance what we do, do it faster and know it's right. Our checking processes have improved by 15%, and it raises the bar with regards to the level of service and integrity in the data.**

### **What was needed?**

At any time, any BYO team member needs to know the status of the work and be able to step in and take over with no service interruption for clients.

Every client is assigned an account manager who personally oversees all client work, can spot problems and assess the impact, interpret the data and provide advice. As the data custodians, account managers are ultimately responsible for the accuracy of what's sent to clients and the relationships.

Account managers need to check thousands of transactions in files and review reports. Audits and data checks are an inescapable part of their role, but it's time-consuming manual work.

When the COVID-19 economic crisis hit, like other bookkeepers and accountants, BYO Group experienced a flood of enquiries and pleas from stressed and worried clients faced with forced closures, plunging revenues and changing operations. As governments announced assistance and stimulus packages for business, clients needed help navigating eligibility and implementing schemes. Workloads for the BYO team jumped, but it didn't mean any existing or standard work disappeared.

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**XBert has been a blessing during busy periods. If we were bogged down in data, we wouldn't have been able to stay updated on changing legislation and implement the JobKeeper scheme for eligible clients.”**



**Our account managers are the data custodians. They used to manually check thousands of transactions in files and run their eyes over 'bumpy reports' to ensure accuracy. Now, XBert gets there first, triggers meaningful conversations and gives us more time with clients to add value.**

### **What XBert does for BYO Group**

Diane signed up to XBert CONNECT for advisors. After syncing several Xero files, in minutes, Diane was blown away with how quickly XBert found inconsistencies - particularly for GST, ABN and business registrations - and how easily she could save clients money. Straight away, the value of XBert was clear.

XBert monitors business information databases like the Australian Business Register (ABR). You're alerted to changes or discrepancies of the Goods and Services Tax (GST) status, Australian Business Number (ABN), business name or business registration of contacts in Xero. Otherwise, these checks can take hours depending on the number of clients and suppliers.

The account managers at BYO Group open XBert every morning. Previously, they'd have to manually check thousands of transactions in files across many clients and review reports to ensure accuracy and correct account coding.

Now, XBert's hourly AI data audits and analysis perform checks in the background, spotting issues and inconsistencies for account managers to investigate.

They know the data is right, the health of their client's business and work queue status at any time.

***These checks safeguard clients by ensuring they only pay suppliers or contractors GST when they should, meet compliance obligations and trade with legally registered businesses.***

**Having accurate, up-to-date insights helps identify areas to discuss with clients. There's more time for advisory and more confidence in the advice.**

### **The results – reaching perfect faster**

According to Diane, XBert really delivers. She loves that it analyses data from many different platforms and looks at integrity across the entire system, also checking data and entries from automated bill and receipt software against past supplier behaviour.

The alerts to potential errors, anomalies and patterns, and resolving these directly in Xero, helps BYO Group maintain their standard for high-quality data. The team keeps its momentum up with AI automation eliminating labour-intensive audits and checks. For account managers, XBert highlights areas of concern, triggers meaningful conversations with clients and provides trustworthy insights for advice.

The accuracy and efficiency of manual checking processes have improved by 15 per cent and they have greater confidence in the data as XBert detects variables earlier and faster than before. Since having XBert on their side, job satisfaction has also increased when reviewing work.

XBert gives BYO Group the time to tackle any changes or disruption that may arise. There are more opportunities for professional development and to enhance client relationships. XBert's raised the bar with regards to the level of service and integrity in the data.

Bookkeeping is a stressful job with many immovable deadlines and pressure to get things right. Diane considers XBert a fantastic tool that looks at integrity across the entire system and believes it's one of the only productivity tools developed with bookkeepers and the tasks they do in mind. She says XBert is a great training tool for junior staff and for clients to understand what can go wrong, the implications, and what can be improved.

**Diane no longer has to intensively check the work of her team or review data at a granular level. She's moved away from oversight and dedicates time to growing her practice with confidence.**

### **The future of BYO Group + XBert**

BYO Group is passionate about their clients' success and their role in making it happen. XBert saves hours, allowing the team to be more proactive and better service clients. The AI auditing and process automation streamline their workflows, provide accurate insights and enhance what they do.

All new client proposals include XBert and specify the value and efficiency savings the solution delivers. Diane is expanding XBert across her client-base, which will lead to even higher productivity gains and value-adding for clients.

Diane is one of XBert's most eager consultants and regularly contributes feedback. She's been working with the data science and development teams on some upcoming alerts so that XBert continues to be an amazing add-on helping bookkeepers, accountants and business owners work together and succeed.

**Discover what XBert can do for your business by starting a free trial now.**