

Digital advisory

Data offering

Our dedicated digital advisory team has access to specialist diagnostic software which can help spot potential issues. Our team can help you understand the diagnostic reports and help fix any problems. We offer this support in 3 different ways:

Data Review £100

A review of transactions to highlight possible errors or inconsistencies in data input*

- Identify potential issues in several common areas (duplicated contacts/multi-coded contacts/contact defaults/duplicated transactions/overpayments/transactions without attachments)
- Highlight any 'red flag' areas for you to review

Request more information.

**Note: You must be on Xero to benefit from a data review*

Digital Health Check from £275

An overview of systems use and advice on areas of weakness, with general solutions provided

- Identify potential issues in several common areas (duplicated contacts/multi-coded contacts/contact defaults/duplicated transactions/overpayments/transactions without attachments)
- Up to 25 data issues corrected (+ all relevant contact defaults)
- Review of Xero bank feeds for completeness
- Review of any bolt-on apps being used and assessment of their basic effectiveness
- Review any 'red flag' areas of weakness, and highlight possible solutions
- Offer general advice on areas where processes can be improved
- Identify potential training needs

Request more information.

Finance Function Review from £850

A critical analysis of your finance function and advice on areas of improvement

- Identify potential issues in several common areas (duplicated contacts/multi-coded contacts/contact defaults/duplicated transactions/overpayments/transactions without attachments)
- Up to 50 data issues corrected (+ all relevant contact defaults)
- Review of Xero bank feeds for completeness
- Review of any bolt-on apps being used and assessment of their basic effectiveness
- Review any 'red flag' areas of weakness, and highlight possible solutions
- Meeting (in-person or Zoom) to conduct finance function review to highlight areas that might benefit from automation, including specific app recommendations
- Build a bespoke report in Xero based on business requirement
- Provide an overview of business performance
- Report of key financial KPI's to give better business oversight
- One hour of training based on needs identified

Request more information.

Why Harold Sharp?

As a platinum Xero partner, we are well placed to advise on all aspects of cloud-based software. We match our clients' needs with cutting-edge technology and a dedicated chartered accountant to deliver pro-active management of finances. Our aim is to take the hassle out of your finances, helping you save time, make money and grow your business.

If you are looking for further advice as to how to get more out of your Xero subscription, contact **our app advisory team** to discuss your requirements.

Contact our team:

Cathy Samuel, Paul Edwards & Ryan Alderson
fintech@haroldsharp.co.uk
0161 905 1616

“The Harold Sharp team has a unique ability to integrate technology with providing commercial insight, which has helped us to make informed decisions at speed.”

Richard Clark, Managing Director
Drynks Unlimited