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accounting-related tasks and provide deep insights to enable them to run their business better.

Feb. 29, 2024

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At its inaugural Investor Day on February 28, 2024, global small business platform [Xero](#) unveiled its AI vision which the business says has the potential to reimagine accounting and improve the lives of small businesses. This included previewing ‘*Just Ask Xero*’ (JAX), the company’s new GenAI-powered smart business companion for small businesses and their advisors — that will help them complete accounting-related tasks and provide deep insights to enable them to run their business better.

Xero outlined its approach to improve how small businesses and advisors can manage their accounting by integrating AI into business-facing tasks to automate them, help improve efficiency, and empower them with better insights to run their business. Xero is doing this by:

- Introducing conversational interfaces on the apps and surfaces (i.e. mobile, email

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most trusted and insightful small business platform.”

### **Introducing GenAI smart business companion**

Xero is developing a conversational interface – called *Just Ask Xero (JAX)* – using powerful GenAI technology.

JAX gives users a natural, approachable way to interact with Xero's product, right from within the apps and devices they already use everyday. When available, Xero's customers will be able to *Just Ask Xero* to complete tasks like generating an invoice, editing a quote or paying a bill, either in Xero or other commonly used apps and surfaces such as mobile, WhatsApp and email. JAX will not only complete the task, but it will also anticipate other tasks that may follow, such as sending an email to follow up on an overdue payment. It will also provide rapid, personalised insights on demand, such as cash flow projections, to give customers the confidence they need to make business decisions.

Find out more about how **JAX will work and see a video [here](#)**. A JAX beta will go live later this calendar year.

### **Using GenAI to onboard customers and support next generation customer service**

Xero has also rolled out an AI assistant to improve the customer onboarding experience.

**[Announced at Xerocon Sydney](#)**, the AI assistant provides new users with relevant answers and information as they set up their Xero dashboard and get started in the product. In the future Xero plans to integrate the AI assistant into the JAX experience to iteratively streamline the onboarding and troubleshooting experience.

Xero has also embedded a GenAI tool into Xero Central to provide answers customers

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Vice President of Data & Science and Akankshu Dhawan, Senior Vice President of Product – Direct, Growth, and AI products.

Eitan has spent the past four years as Director of Applied Science at Amazon, focused on developing strategies that disrupted the product development process. Akankshu most recently oversaw Uber's Earner, AI & Data products.

"We're putting the right global experience, strategy, data and partnerships in place to harness the power of AI, while making sure our tools remain grounded in truth," said Jolly. "Eitan and Akankshu's many years experience in accelerating digital commerce and empowering worldwide businesses through AI, supports our strategy as we continue to drive innovation and value for our customers."

### **Building on Xero's AI-powered tools and feature**

Xero has a long and proven experience with AI underpinning many of its products, including bank reconciliation predictions, Hubdoc data capture, Xero Expenses, and cash flow forecasting in Xero Analytics Plus.

"AI already powers many of Xero's everyday features, saving our customers time and delivering them important insights. Our AI vision builds on our strong foundation of experience in building data-driven products, and holds true to the [responsible data use commitments](#) that guide our decisions," Jolly said.

Accounting • Artificial Intelligence

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