

E-book

10 reasons staffing and recruiting agencies choose Sage Intacct



Sage


Vision33

As a finance leader of a staffing or recruiting agency,

you know that moving to a new accounting system is a big undertaking, and you may choose a new vendor only once or twice in your career. If you are considering a move to a new accounting and financial management system, make sure you select a vendor that has a rock-solid track record of supporting your industry and one who partners in your success. This eBook describes the top 10 reasons staffing and recruiting agencies choose Sage Intacct.

Sage



1

We speak the language of finance and staffing agencies

Whether you need to track profitability by customer, improve the timekeeping and payment process, or streamline payroll, billing, commissions and reporting, Sage Intacct is built to support the reporting and billing demands of today's staffing industry.

By partnering with our customers and investing in their success, we understand the unique workflows and needs of fast-growing staffing and recruiting agencies. Sage Special Services implementations leverage

the experience of 1000s of implementations as well as the financial and accounting backgrounds of the specialized team members.

In fact, 85% of our professional services staff are CPAs or former CFOs. We know the importance of a quick return on investment —and never underestimate the importance of a well-developed project plan optimized to deliver high ROI for your business.



2

Our accounting and financial management system is flexible and easy to use

Sage Intacct Projects module enables staffing and recruiting agencies to track operational and financial data down to the project level in a variety of ways such as region, type, customer, even job title. It helps teams across the company collaborate and easily meet customers' unique invoicing requirements while reducing data entry by automating and streamlining workflows.



User adoption is quick with the intuitive interface and in-product help. Job satisfaction increases as Account Managers, Recruiters and Accounting and Finance teams quickly see how much easier Project's flexibility and automation makes their jobs. Anytime, anywhere access and all of the data brought together into Sage Intacct for one system of record throughout the customer lifecycle helps shorten the close and accelerate cycle times.

Functionality built to benefit staffing and recruiting agencies includes:

For Finance Teams

- Multi-entity and multi-currency
- Dimensional, AI-powered Intelligent GL
- Cash flow forecasting
- Project costing and billing
- Time and expense management
- Automated workflows
- Revenue recognition
- Payroll, HRIS third-party integrations
- Commissions management

For Account Managers

- Real-time, project-level reporting
- Dimensional tagging for easy customized reports
- AI-powered time tracking
- Role-based dashboards
- Budget tracking by client, project, ++
- Pre-built integrations and open APIs
- Resource management
- CRM/Salesforce Integrations
- Process checklists

“One of the biggest productivity improvements we’ve seen is during our complicated invoicing process. With 500+ staff working across 400+ client projects at any given time, our weekly invoicing often got out of control before we had Sage Intacct in place. But now, we’re able to efficiently produce invoices in any format the client wants.”

**Gina Brewster - Corporate VP of Finance,
Premier Talent Partners**



3

We empower key stakeholders to make data-based decisions quicker



As the financial leader using Sage Intacct, you can easily see project, client, department, and company-level key performance indicators as well as trends for actionable insights and informed decision making—all without using spreadsheets. Your executives can access configurable and dynamic dashboards for quick, any-time access to business performance metrics with the ability to drill into details. Your teams can choose from 100s of canned reports to easily meet compliance requirements and even customize them to meet specific project needs.

With Sage Intacct as the single source of truth, teams across your company have access to real-time reporting such as budget vs

actuals, project spend, project snapshot, and any other metric they need to monitor. Your data will come alive as you enhance your audiences' understanding of the story behind it when you create beautiful visual financial and operational reports with Sage Intacct's Interactive Visual Explorer that utilizes artificial intelligence.

Sage Intacct continuously innovates to provide a future-proof system. By incorporating artificial intelligence (AI) and machine learning, users become more efficient, from detecting anomalies to completing timesheets. Plus, you gain much-sought-after business performance predictability with AI assisted forecasting.

“Sage Intacct has given us new capabilities to take a deep dive into granular detail on each project, on each customer, to determine profitability and make smart business decisions.”

~ Gina Brewster,
Corporate VP of Finance,
Premier Talent Partners

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We've proven that we help staffing and recruiting agencies profitably grow

Thousands of companies across the globe rely on Sage Intacct to help them profitably manage and effectively fuel their growth. In fact, our customers have run more than 1.5 million projects on Sage Intacct Projects. Discover how the results continue to impress in this customer story.



The agency

Founded in 1997, TrainingPros is a specialized staffing agency focused on meeting client needs for learning and development. The Atlanta-based company provides companies nationwide with skilled contractors. Fortune 1000 businesses such as The Home Depot, The Kraft Heinz Company, and Newell Rubbermaid rely on TrainingPros to boost business performance.

The struggle

As TrainingPros grew—its revenue more than doubling—so did its need for financial management that could handle increasing complexity and deliver comprehensive visibility. Their QuickBooks system allowed just two concurrent users and commissions lived in a “monster” spreadsheet prone to broken formulas. “We had a hodgepodge of products that was very cumbersome, with no real-time sharing of valuable data at all,” said CFO Jill Vogin.

The solution

With the forward-thinking Vogin spearheading a move to modern cloud accounting, TrainingPros selected Sage Intacct as the ideal platform for its next phase of growth. Sage Intacct’s cloud model supports TrainingPros’ virtual business with permanent staff and consultants working remotely. “Sage Intacct has the user-friendliness, the customization ability, and the strong support I was looking for,” Vogin said.

The results

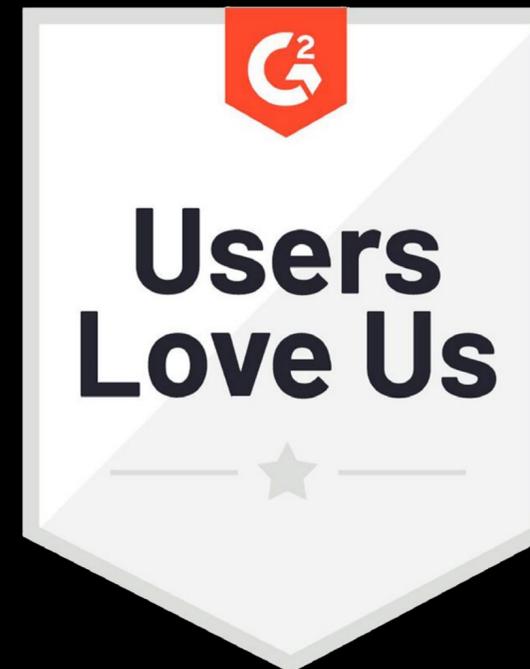
TrainingPros continues to achieve remarkable gains in key metrics since adopting Sage Intacct. Once they replaced QuickBooks, they improved visibility and were able to:

- Reduce payroll runs from 5 days to 3 hours
- Simplify commission management
- Increase margins by 11%

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Customers love us and analysts recognize our powerful and innovative applications

Thousands of companies across the globe rely on Sage Intacct to help them profitably manage and effectively fuel their growth. In fact, our customers have run more than 1.5 million projects on Sage Intacct Projects. Discover how the results continue to impress in this customer story.



Customers rank Sage Intacct as #1 in customer satisfaction on G2's GridReport for Mid-Market ERP System over 5 years in a row.



Our user review scores on TrustRadius earned us two 2021 "Best Of" Awards for Best Feature Set and Best Usability—that means our product earned first place in the Accounting category for these two attribute segments. s autquo magnien ditibus.

IDC and Gartner, premier global analyst firms, recognize Sage Intacct in multiple reports:



- Sage Intacct named a Leader by the IDC MarketScape in Worldwide SaaS and Cloud-Enabled Midmarket Finance and Accounting Applications

Source: IDC MarketScape: Worldwide SaaS and Cloud-Enabled Midmarket Finance and Accounting Applications 2020 Vendor Assessment”, by Kevin Permenter, Frank Della Rosa, Shari Lava and Mickey North Rizza, April 2020, IDC # US458372220

- Sage Intacct receives the highest score in Core Financials for the Lower Midsize Enterprises Use Case in 2021 Gartner Critical Capabilities for Cloud Core Financial Management Suites for Midsize, Large and Global Enterprises report.

Source: Gartner, Inc., “Critical Capabilities for Cloud Core Financial Management Suites for Midsize, Large, and Global Enterprises”; Robert Anderson, John Van Decker, Greg Leiter; May 11, 2021 (ID: G00733936) (In the 2017 report Sage Intacct was recognized as “Intacct”)



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We're the only vendor to offer a Buy with Confidence guarantee

To demonstrate our commitment to your success, we've established a Buy with Confidence program, outlining the level of service you can expect from us. Gain peace of mind knowing your financial application is consistently secure, reliable, and available.



Our Service Level Agreement (SLA) is detailed, airtight, and one of the strongest in the industry.

99.8%

99.8% guaranteed uptime

In addition, to our Availability Plus subscription, you get a credit of 10% for each percentage point below the availability target, up to 50% of that month's subscription fees.

24 Hours

Disaster recovery

In the unlikely event of a disaster, your applications will be available within 24 hours and no more than four hours of data will be lost.

Any Time

Data ownership

You own your data, and you may download this data at any time during your subscription. If you ever decide to leave Sage Intacct, we can assist you in retrieving your data from our systems.

100%

Professional services quality

We strive for 100% satisfaction with our professional services. You can receive a 10% credit if we fail to meet the budget and timeline of our statement of work with you.

Source: sageintacct.com/trust/buy-with-confidence

7

Our Customer for Life Program provides a roadmap for long-term success

We understand that one size does not fit all, and we partner with you to understand what success means for your company. Our teams—from Professional Services and Education Services, to Customer Success and Support—are here to assist you step by step throughout your entire customer journey, helping ensure that Sage Intacct serves your organization's needs now and into the future.



“We are always looking for more efficient ways to do things. We are looking for ways to figure out where we are going and where we’re going to be in the future. We would like to be able to say what is going to happen next month and six months from now. With Sage Intacct, we are able to use dimensions to mine data crucial to this mission. Dashboards, trendlines and the ability to customize reports give us the tools to communicate with our team and clients.”

~ Cindy Poulin, Accounting Manager, Hire Velocity



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431,000 CPAs cannot be wrong

Sage Intacct is the AICPA's only preferred provider of financial applications.

Not only does the AICPA set the professional and technical standards for the CPA profession, it is also one of the largest member associations in the world, with over 431,000 members in 122 countries and territories.



AICPA®

Business Solutions

Preferred Provider of Financial Applications



“We chose Sage Intacct’s AICPA award-winning platform over Oracle NetSuite, Microsoft Dynamics, and Blackbaud Financial Edge because it was the easiest to use, and every accountant and auditor we talked with absolutely loved the system.”

~ Chace Holland, Director,
Grammy Museum Mississippi

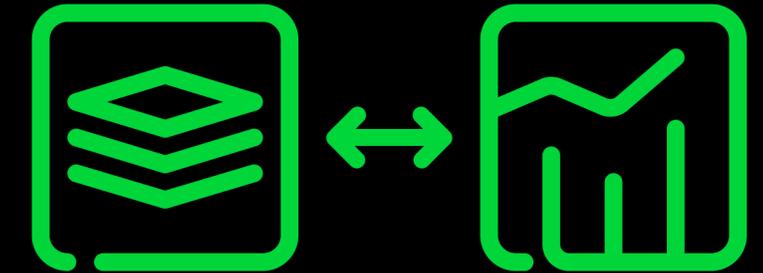
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We help create a company-wide culture of financial responsibility

Sage Intacct gives your teams the information they need to make financially minded, strategic decisions. Armed with customizable dashboards that can include real-time project spend, gross profit, and rates trendlines, your finance teams, account managers and business development professionals can spot potential opportunities or even overruns early enough to act before they impact costs or profitability.

Users can avoid surprises with at-a-glance key performance metrics populated with real-time data that can be accessed anytime, anywhere, even from their favorite mobile

device. Sage Intacct helps eliminate manual processes, streamlines workflows and brings all of the financial and operational data into one place helping your staffing and recruiting agency maintain a competitive edge while demonstrating data-backed value to your customers.



“We were able to build that dashboard very quickly—we didn’t need a team of consultants to come in and reprogram everything from what the previous president wanted to what the new president wants. That’s huge, being able to be that nimble. We said at the beginning, ‘Hey everybody, you have a dashboard in Sage Intacct—everything you need is at your fingertips.’ Account Managers can go to their dashboards and see how far away they are from the next bonus, how commissions compare over time, and look at their outstanding invoices,” Vogin said. “That’s the model we’re working with today to the best of our ability.”

~ Jill Vogin, CFO,
TrainingPros



10 Our leading technology was born in the cloud

We have over 20 years of cloud experience as an early innovator in cloud financials. Sage Intacct was born in the cloud and continues to lead the industry with cutting edge technology such as artificial intelligence and machine learning. Digital connections and open APIs allow you to easily integrate your favorite payroll, CRM and even homegrown systems, bringing all of the data together into Sage Intacct for one source of truth, improved collaboration, and better visibility and control.

Unlike legacy on-premises solutions, our multi-tenant true cloud foundation means you'll never have to worry about not being on the latest version of our software nor about complicated and expensive upgrades. It also provides the key framework required to allow artificial intelligence and machine learning to provide the speed, accuracy, and insights that can take your teams' capabilities to the next level. While other vendors talk about the future on their roadmap, Sage Intacct is already delivering.



“We realized we couldn't have a system all in one that worked great for everybody. So we came up with these two programs that can talk to each other, Sage Intacct for accounting and billing and Paycor for payroll and benefits.”

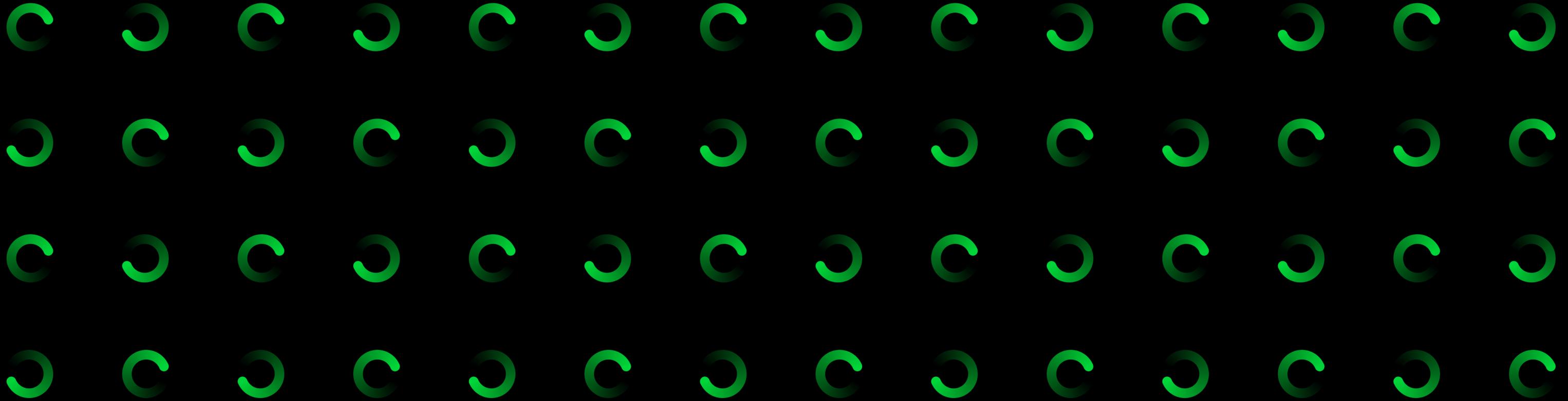
~ VP Finance, HRU Technical Resources

Staffing and recruiting agencies choose Sage Intacct because our comprehensive financial management capabilities, including our project-based accounting features, are tailored to support project-centric businesses helping them improve efficiency in their day-to-day tasks while meeting their strategic goals. The over 1.5 million projects that customers have ran on our system are further proof that Sage Intacct is the right product for the staffing and recruiting industry. Our Customer-for-Life mentality and culture means doing right by our customers is in our DNA. We partner with customers for the long term to help them achieve positive outcomes for their business.



Sage





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