



From Sage 50 to Sage Intacct: How CCPA Modernized Finance for the Future

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CANADIAN COUNSELLING AND
PSYCHOTHERAPY ASSOCIATION
L'ASSOCIATION CANADIENNE DE
COUNSELING ET DE PSYCHOTHÉRAPIE

About

The Canadian Counselling and Psychotherapy Association (CCPA) is a national bilingual association representing over 20,000 professional counsellors and psychotherapists across Canada.

As a member-focused organization, CCPA advocates on behalf of its members to advance the counselling and psychotherapy profession's regulation nationwide, helping raise professional standards while improving access to safe, high-quality mental health care for Canadians.

Through its network of 17 chapters—including provincial, specialty, and professional practice groups—CCPA also connects members with peers who share common interests, practice areas, and regional priorities.

In addition to its advocacy efforts, CCPA provides the nationally recognized Canadian Certified Counsellor (CCC) credential, which helps employers, clients, and the public identify qualified professionals—particularly in provinces where the profession is not yet regulated.

The association also delivers valuable member benefits, including professional development opportunities, networking, and access to affordable professional liability insurance, giving members the resources and protection they need to practice with confidence.



A Lean Finance Team Reaches Its Limits

While CCPA's membership has grown to over 20,000 professionals, the organization maintains a lean operation, with just 38 employees and a two-person finance team.

Tony Laderoute, CCPA's senior director of finance and operations, has made process improvement his mission since joining the organization 10 years ago. He's championed the measured move to cloud-based systems that improve efficiency, visibility, and functionality while making employees' jobs easier.

On the finance side, CCPA ran Sage 50, desktop-based accounting software designed for small and mid-sized businesses.

"Sage 50 had seen its time," Tony says. "It was tied to a couple people's laptops and a server, and if the power went down in the office, we had nothing."

Sage 50's manual processes made it difficult to produce timely, accurate financial reports. Tony and his finance colleague spent too much time manipulating data in spreadsheets and couldn't quickly pull information requested by leadership.



"We also had a challenge with deferring revenue," Tony continues. "With some of our products, the revenue has to be deferred because it's an annual license. The auditors require us to defer it over 12 months. That all had to be done manually in Sage 50."

And the audit process itself was painful. Tony explains that an audit could take a month and involve a boardroom table buried in paper.

Disconnected data created even more manual work for the finance team. CCPA's association management system is the central database for all contacts and transactions, including online store purchases, event registrations, and membership and certification payments. But because the association management system wasn't integrated with Sage 50, all transactions and related data had to be manually entered into the accounting system, creating extra effort and increasing the risk of errors.



The Right Solution and a Trusted Partner

Sage is one of the world's largest and most trusted business software providers. Tony and the team wanted to stay in the Sage ecosystem, making Sage Intacct the logical next step in CCPA's digital transformation journey.

As Sage's flagship solution, Sage Intacct is trusted by over 30,000 high-performance finance teams. The cloud-native financial management solution was designed by accountants and is endorsed by the American Institute of Certified Public Accountants.

Sage recommended Vision33 as the trusted implementation and support partner to help CCPA transition to and succeed with Sage Intacct.

Headquartered in St. John's, Newfoundland and Labrador, Canada, Vision33 is an award-winning Sage Intacct partner with certified consultants throughout North America and Europe.

"Vision33 has been awesome," Tony says. "We're all on the same page. No one there is stuffy. We can just talk through things, and we have a good rapport."

Vision33 implemented Sage Intacct and integrated it with CCPA's association management system via Saltbox Integration Platform.

Saltbox is a cloud-based integration solution developed by Vision33's integration and automation experts to seamlessly connect any application, data set, or an entire tech stack.

Saltbox runs four daily workflows that pull all the contact and transaction data from CCPA's association management system and push it into Sage Intacct.





Real-Time Insights, Faster Audits, and a More Efficient Finance Team

Since going live with Sage Intacct, Tony says the impact on CCPA's finance team has been substantial.

"The biggest difference is the real-time reporting," he notes. "When our CEO asks, 'How much do we have in this account?' or 'What's our spend on this year-to-date?' or I need to pull a quarterly report together, I can do it in an hour versus two to three days."

Tony adds that he appreciates Sage Intacct's robust collection of report templates. Instead of creating reports from scratch, he can quickly and easily tweak them to suit his needs.

"We also like the product's flexibility," Tony shares. "We were able to implement Sage Intacct's core features, then add modules when we were ready. We didn't have to bite off too much all at once."

Two additional modules quickly proved to be the most beneficial: the expense management module, which effortlessly moves time and expense data to invoices and revenue recognition workflows, and the revenue recognition module, which automatically recognizes revenue according to accounting standards and streamlines revenue deferral workflows and operations.

Tony says, ***“Where revenue deferral was manual with Sage 50, now we ‘select all,’ run it against the deferral module, and we’re good. It gets posted. It’s a huge time-saver.”***

Data residency was an important consideration when moving to the cloud. Because CCPA manages sensitive mental health and personal information, it needed its data hosted in Canada to comply with regulations. Sage Intacct, hosted on Amazon Web Services (AWS), checked that box.

CCPA has also benefited from being able to do more with less since running Sage Intacct.

“At one point, we had two accounting administrators, and when one of them resigned, we didn’t need to replace them,” Tony explains. ***“The person who’s there now can do everything that needs to be done and they’re not overwhelmed.”***

Tony says the confidence from CCPA’s CEO and board is higher than ever thanks to Sage Intacct’s accurate, up-to-the-minute information.

“We’ve proven it time and again because we’ve now gone through three successful audits,” he elaborates. ***“Where they used to take a month, they don’t even take a week. And you know what? Our auditors love Sage Intacct too.”***



Confidence in Data, Confidence in the Future

Tony says his final initiative before “riding off into the sunset” is replacing CCPA’s association management system. A third party is currently building a modern cloud-based solution, and when it’s complete, Vision33 will get it talking to Sage Intacct via Saltbox.

Having undergone a significant and successful digital transformation with powerful, intelligent cloud-based solutions, including Sage Intacct, CCPA is well positioned for the future.

“I can’t say enough good things about Sage Intacct,” Tony concludes. “It’s made a world of difference in my role and my administrator’s role. It freed us up to do the things that are important, like real-time reporting and having confidence in accurate information. That’s a big deal.”



Vision33 transforms business processes and results for customers by delivering value through the promise of technology and its benefits for growing businesses. For over 30 years, Vision33 has helped companies integrate and automate their business processes and applications to better serve their customers, employees, and stakeholders. The technologies may have changed drastically in 30 years, but Vision33's mission has never wavered.

With over 1,000 customers worldwide, Vision33 helps manufacturers, distributors, service firms, and SaaS businesses outperform their competition and lead their industries with successful technology investments.

With nearly 400 employees, Vision33 offers product expertise, business experience, and innovative technology leadership. Whether it's a global company with 100 subsidiaries or a small business, Vision33 works alongside every customer to meet their goals.

Vision33 also has formal partnerships to resell, implement, and support leading ERP applications, is a leader in cloud deployment, and has developed exclusive products, including Saltbox and Lumiya.

*For more information about Vision33, visit **www.vision33.com**.*

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