

Transforming Financial Management With Sage Intacct and Outsourced Controller Services

Background

A mid-sized construction firm (the Company) with a diverse project portfolio, faced challenges managing its financial processes using manual, paper and Excel-based methods, and QuickBooks. As the Company expanded, these legacy systems struggled to keep pace with the increasing complexities of its financial operations. In response, the Company opted to implement [Sage Intacct](#), a cloud-based financial management solution. Concurrently, it decided to outsource their transactional accounting functions and controller-level review to further optimize financial processes.

Challenges

- 1. Manual processes and QuickBooks:** The Company relied on manual, paper-based processes and QuickBooks as a basic check register, resulting in inefficiencies and limited financial visibility
- 2. Project financial visibility:** The Company had lack of real-time insights into project financials, hindering decision-making
- 3. Time constraints for CFO:** The CFO faced time constraints due to the manual review process, limiting strategic focus

Solutions

To address these challenges, the Company simultaneously initiated the implementation of Sage Intacct and decided to [outsource their accounting transactions and controller-level review](#) to Cherry Bekaert. This dual approach aimed to automate financial processes, enhance project visibility and free up valuable time for the CFO.

Key Initiatives

1. Outsourced Controller Services:

- a. System support:** The third-party controller service provided dedicated system support, ensuring seamless integration with Sage Intacct and additional third-party software to promptly resolve issues
- b. Data integrity:** The outsourced service provided data integrity during data entry and review, reducing the risk of errors and discrepancies
- c. Task overview:** The controller service offered a comprehensive overview of daily, weekly and monthly tasks, optimizing the financial workflow.

2. Robust Approval Process for Accounts Payable:

- a. Automated workflow:** Sage Intacct and Yooz introduced automated workflows for accounts payable, reducing manual intervention and streamlining the approval process
- b. Audit trail:** The system provided a detailed audit trail, ensuring transparency and accountability in the approval process
- c. Payment security:** With the use of BILL, the Company no longer struggles with time-consuming positive pay approvals and high levels of fraud by replacing their former check issuing system, which improves vendor relationships

3. Accurate Accounting of Employee Expenses:

- a. Integrated expense management:** Sage Intacct seamlessly integrated with the Company's expense management system, ensuring accurate and timely recording of employee expenses
- b. Policy compliance:** The system helped enforce expense policies, reducing the risk of non-compliance and improving financial accuracy

4. Enhanced Project Visibility:

- a. Real-time reporting:** Sage Intacct's real-time reporting capabilities empowered project managers and executives with up-to-date financial information, improving decision-making
- b. Project budgeting:** The system facilitated more detailed project budgeting, helping project managers better grasp the success of their projects and stay within budget
- c. Industry specific KPI's:** The system provided dashboards, including Retention Receivable, Committed Costs, Invoice Backlog, Revenue Recognized %, Invoice to Revenue Ratio %, and WIP Reporting

Results

The dual strategy of implementing Sage Intacct and outsourcing controller-level review has transformed the Company's financial management. By streamlining processes, automation, and outsourcing controller services, the Company experienced reduced manual effort and optimized daily financial tasks. Additionally, the Cherry Bekaert team enabled the Company with increased data accuracy, enhanced compliance and reduced errors in financial reporting. Finally, outsourcing the controller-level review freed up valuable time for the Company's CFO, paving the way for a more strategic focus on organizational growth.

Conclusion

The Company successfully leveraged Sage Intacct and outsourced controller services to achieve a higher level of financial management efficiency, accuracy and strategic focus. This innovative approach positioned the Company for continued success in the competitive construction industry.

Let Us Guide You Forward

Outsourced accounting can benefit a wide range of business that want to reduce costs, improve efficiencies and focus on core operations. Cherry Bekaert's [Outsourced Accounting Services](#) team produces accurate and timely financial reporting, while managing confidentiality and data security. Reach out to your Cherry Bekaert advisor to learn more about how your business can streamline accounting processes, increase productivity and make informed decisions based on reliable financial information.

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