

E-book

# Graduate with Sage: Choosing the tech you need to support growth

Sage







**“The CFO’s role in deciding where to prioritize investments and where to make cutbacks requires close collaboration with the CEO and a strong rapport with leaders across the organization.”**

**Christoph Ott**

CFO, Dizmo and Planisy

**planisy**

POWERED BY DIZMO



# Introduction

As a finance leader and Sage 50 customer, you may be noticing a shift in the role you play within your organization. You face challenges from every direction; an economy that constantly shifts and is impossible to predict, ever-changing compliance requirements that are costly to get wrong, and evolving cybersecurity threats that demand meticulous defense. All these pressures are pushing you to become more strategic in your work.

The great news is, embracing this will allow you to make a huge impact on your organization. In the future, your more expanded role will involve leading growth and profitability, as well as managing the rising complexity that comes with success.

After all, it's finance leaders like you who have the vision, drive, and skillset to make achieving the biggest goals a reality.

To do this effectively, you may need to consider new financial software that can manage the increase in technology and arm you with the insights you need to succeed.

In this e-book, we explore how this kind of technology is both the driving force behind—and enabler of—your fast-changing role, and help you assess if your organization is ready to take the next step on its journey.





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# A new era of leadership

Traditionally anchored in daily finance and budget management, successful CFOs now have broader, more strategic roles that include company-wide decision-making and innovation. Your access to insights will position you as a central figure in the future direction of your organization.



Our research into what makes a successful CFO in today's landscape revealed:

60%

Of successful finance leaders foresee a future where their insights will increasingly influence company-wide strategy.\*

57%

Predict a **surge in collaboration** with other senior executives and board members.

56%

Are preparing for a heightened demand to offer broader business counsel that's outside the traditional financial domain.\*

**This new era of leadership is reshaping how finance leaders spend their time, and who they closely work with.**

Instead of routine financial tasks, they'll focus more on planning, technology related activities, environmental, Social, and Governance (ESG), sustainability reporting, and managing talent.

\*Sage research report: The secrets of successful CFOs

# Shaping finance with AI and automation

Technology such as AI and automation is empowering finance leaders to adapt to their new roles—both in terms of making the most of insights and saving time on routine tasks.

**This is having a ripple effect that starts at an operational level, leads to higher impact for the finance leader, and ultimately drives the achievement of their top-level goals:**



**74% say over half of their finance processes are now automated.**

**81% say automation frees them up for more strategic initiatives.**

**78% say it has a positive effect on their interactions with C-suite members and board directors.**

**78% say that implementing AI in finance is crucial for organizations to stay competitive.**



AI, automation, and native cloud technology are providing enormous opportunities for finance teams to create value in unexpected ways. Early adoption and experimentation are the key to everything from growing revenue and revolutionizing workflows, to improving job satisfaction and becoming more competitive.

**“With the accelerating emergence of AI, businesses need to understand its potential now and actively look at how they can use it in the medium term to allow our people to maximize their value.”**

**Lewis Dangerfield**  
CFO, Osprey Group

**OSPREY**

**Sage**





# Assess your readiness

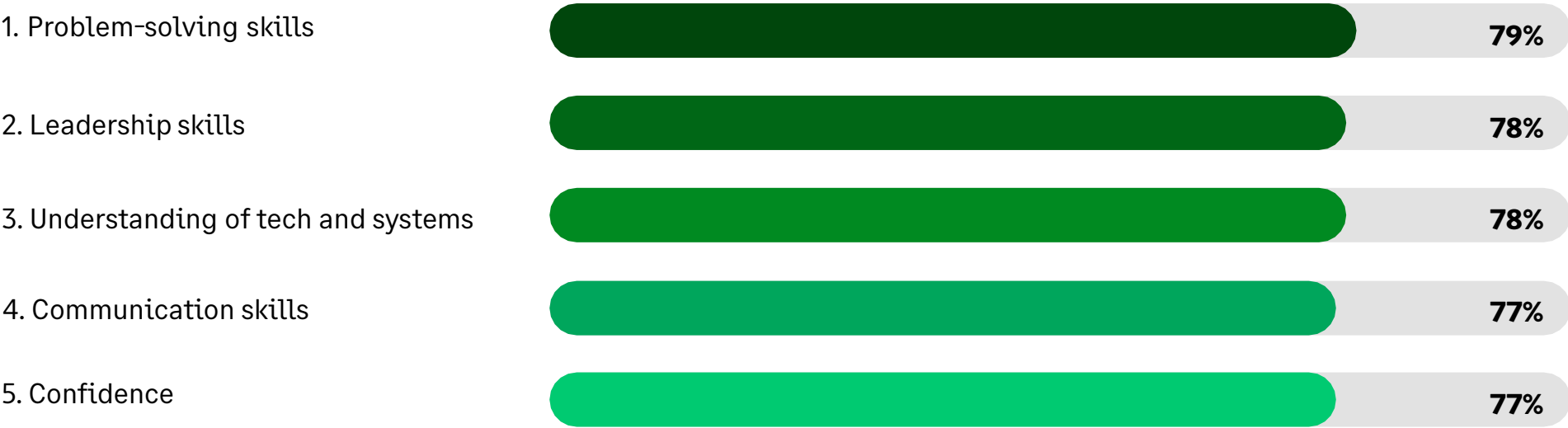
The changing roles of finance leaders mean there are a lot of new areas to create more of an impact in your organization, and it can be difficult to know which ones to prioritize.

You may need to augment your team and consider which technologies will help you best deliver on those new responsibilities. For example, modern native cloud finance solutions are built around collaboration, so should be considered when planning your resources. You'll also need to think about which of your skills could help drive even more value if further developed.



In our research report, we asked finance leaders to share which skills they consider essential for success in their role:

### Top skills listed by CFOs who identify themselves to be successful



### Top skills listed by all CFOs





# Find your starting point

Once you've reflected on your skills, you'll want to consider how well your finance function is performing against your new obligations. You need to know how ready you are to take on more demands from stakeholders and still deliver on your organization's goals.

**To understand this, ask questions like:**

1. How much time do we spend on manual processes?
2. How easy is it to access data from across the organization?
3. How would i describe the way we use financial information?
4. What's our technology architecture like?
5. How effectively is our team deployed?
6. How much time do i have to think about the future?





# Move with Sage

## Plan your next

You'll likely be able to progress using different technology.

If there is room for improvement within your finance function,

Today, you may rely on Sage 50 to meet your accounting and financial management needs. But, as your organization grows and evolves, you might start to push its limits. We want you to have the right solution for every stage of your organization's growth. And for many of those who are growing, moving to Sage Intacct has helped them embrace their evolving role as a finance leader and start to have a greater, more strategic impact.

**If you're thinking about what's next, here are some questions worth considering:**

1. Produce more than 40% of my reports in excel?
2. Lack insight into profitability?
3. Manage 2 or more entities?
4. Spend more than 10 days closing the books?
5. Have difficulty collaborating remotely in real time?



### **If you answered yes**

To any of these questions it could be time to consider upgrading to Sage Intacct.



If you're not quite ready yet, Sage 50 is a robust solution that will continue to support your business.



**“We used Sage 50 for over 5 years and the exponential growth we had meant we needed a solution that could grow with us... 70% of our organization works remotely, so we know cloud-based solutions are the future and will help us grow even further.”**

**James Proctor**

Director of Professional & Managed Services, Phase 3





# What other Sage 50 customers have to say

Sage Intacct has empowered thousands of Sage 50 customers to collaborate in real-time from anywhere; close the books up to 80% faster; get visibility into key metrics in seconds and consolidate all of their entities in minutes.

After making the switch to Sage Intacct, these organizations unlocked efficiencies and insights to power their continued growth.





Jess Howe used Sage Intacct to reduce time spent on month-end processes from 3 weeks to 1 week, freeing her team to focus on more value-adding work.

**“Thanks to Sage Intacct, the finance team has taken on more of a consultancy role, giving advice to colleagues in other departments in a way we weren’t able to before.”**

**Jess Howe**

Finance Manager, Featurespace



Following a “fantastic” implementation process, James Proctor gained more visibility of key financial data, helping him feel more confident in invoicing and accounts.

**“You need your finance system to give you confidence in the data that you’ve got and that you’re invoicing correctly—that’s exactly what Sage Intacct gives us.”**

**James Proctor**

Director of Professional & Managed Services, Phase 3





# Why choose Sage Intacct?

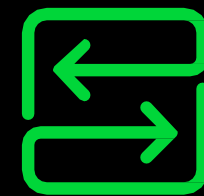
Sage Intacct is an award-winning product recognized by top industry associations and analysts. And, your peers voted Sage Intacct number one in customer satisfaction on software peer review website G2.

Here are just a few of the benefits that Sage Intacct brings to your financial operations:



## Multi-dimensional reporting

- Get the reports you need in seconds rather than days with calculated fields and unlimited dimensions.
- Gain real-time visibility into key performance metrics with dashboards.
- Blend financial and operational data for new profitability insights.



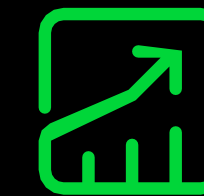
## Streamlined multi-entity management

- Spend minutes instead of days consolidating dozens of entities within a single instance.
- Close the books up to 80% faster.
- Set up new entities in minutes without expensive consultants.



## Built for the cloud

- Switch between organizations with multi-dimensional reports in real-time from anywhere.
- Get four feature rich upgrades per year delivered automatically at no cost.
- Employ modern cloud APIs for always-on integrations as low as 1/10 the cost.



## Automated, scalable financial processes

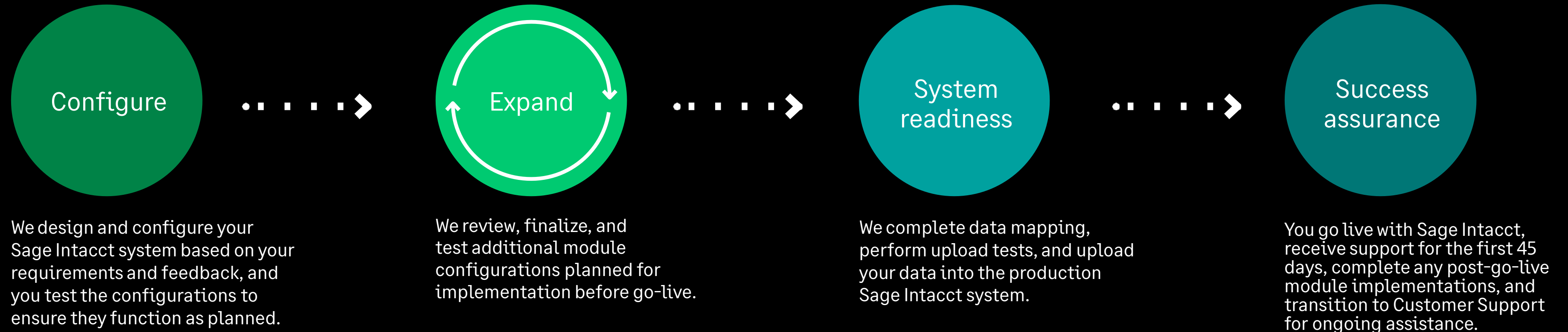
- Grow revenue by 2-4x with little to no additional headcount.
- Increase efficiency by 50-90% with automated purchasing and payment approval workflows.
- Cut DSO by 30-60% and generate up to millions in free cash flow, with automated invoice generation and payment processing.



# How to make the switch

When you're ready for Sage Intacct, you'll be taken through a process that has been tried, tested, and designed with people who made the exact same switch. Our experts make sure you get all the modules you need and bring across all your data quickly and cost-effectively.

The switching process:



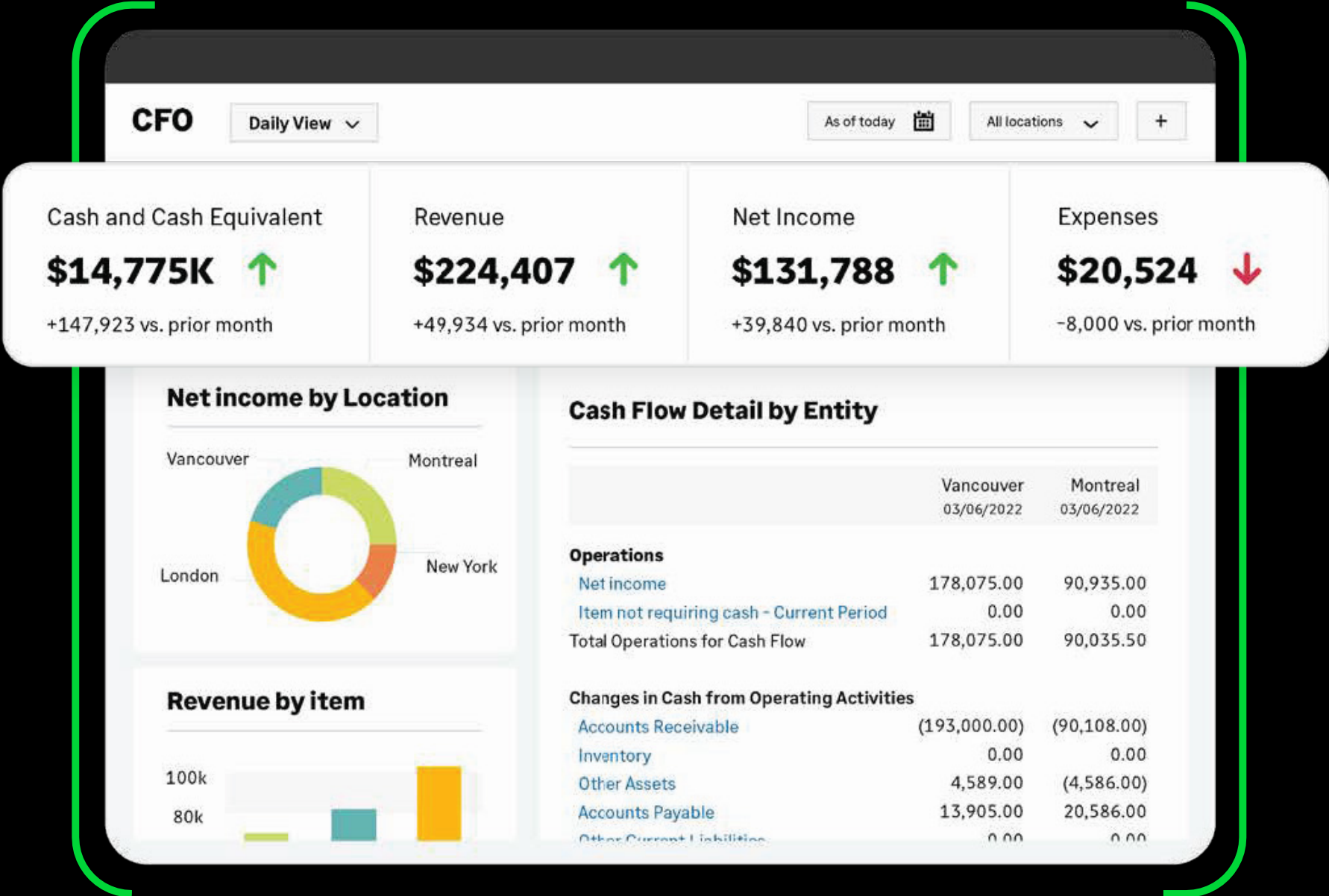


# Next steps: Explore Sage Intacct

With clear and measurable ROI, Sage Intacct offers finance leaders the solutions they need to gain new insights, simplify multi-entity management, work where and how they need to, and automate their key financial processes.

That's why so many organizations have already made the move from Sage 50 to Sage Intacct.

To learn more, take a product tour, and speak to our team, explore Sage Intacct now.







A Sage partner



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