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Scaling Beyond QuickBooks: Streamlining Tech Company Growth

August 6, 2024



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Agenda

Introduction to CLA

Introduction to Sage Intacct

Industry Q&A

Sage Intacct Demo

Conclusion





Why CLA



OUR PURPOSE

CLA exists to create opportunities for our clients, our people, and our communities.

OUR PROMISE

We promise to know you and help you.

CLA Promise

OUR FAMILY CULTURE

We're one family, working together to create opportunities.

OUR STRATEGIC ADVANTAGES

Deep industry specialization
Seamless, integrated capabilities
Premier resource for private businesses and owners
Inspired careers



Curious, Collaborative, Transparent, Inclusive, Reliable



Facts: The Basics

Nearly *130*
U.S. locations

1,200+
principals and
signing directors

14
industries

More than
8,500 people

\$2B

Seamless
experience



Deep Industry Specialization

Agribusiness and cooperatives	Construction	Financial services	Health care and life sciences
Higher education	Manufacturing and distribution	Nonprofit	Professional service organizations
Real estate	Retail	State and local government	Technology
	Transportation and logistics		



Find support at *every* turn

Benefit from guidance on
all aspects of your business.





Why Sage Intacct



Tech Industry-Sage Intacct Team Leaders

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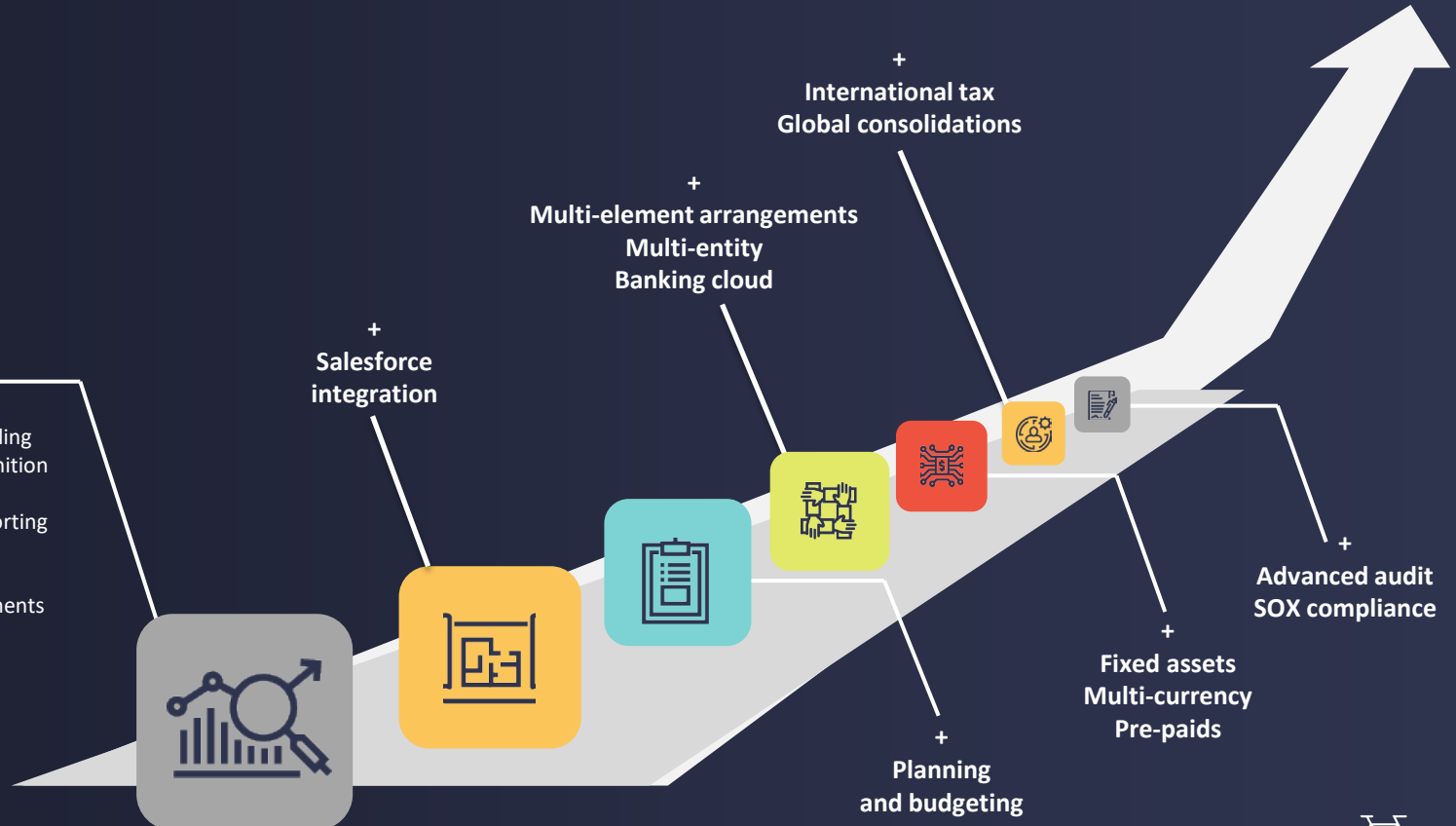
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Start Simple, Scale Big

Start

- Core financials
- Subscription billing
- Revenue recognition
- Dimensional, interactive reporting
- SaaS metrics
- Project tracking
- Electronic payments



Sage Intacct

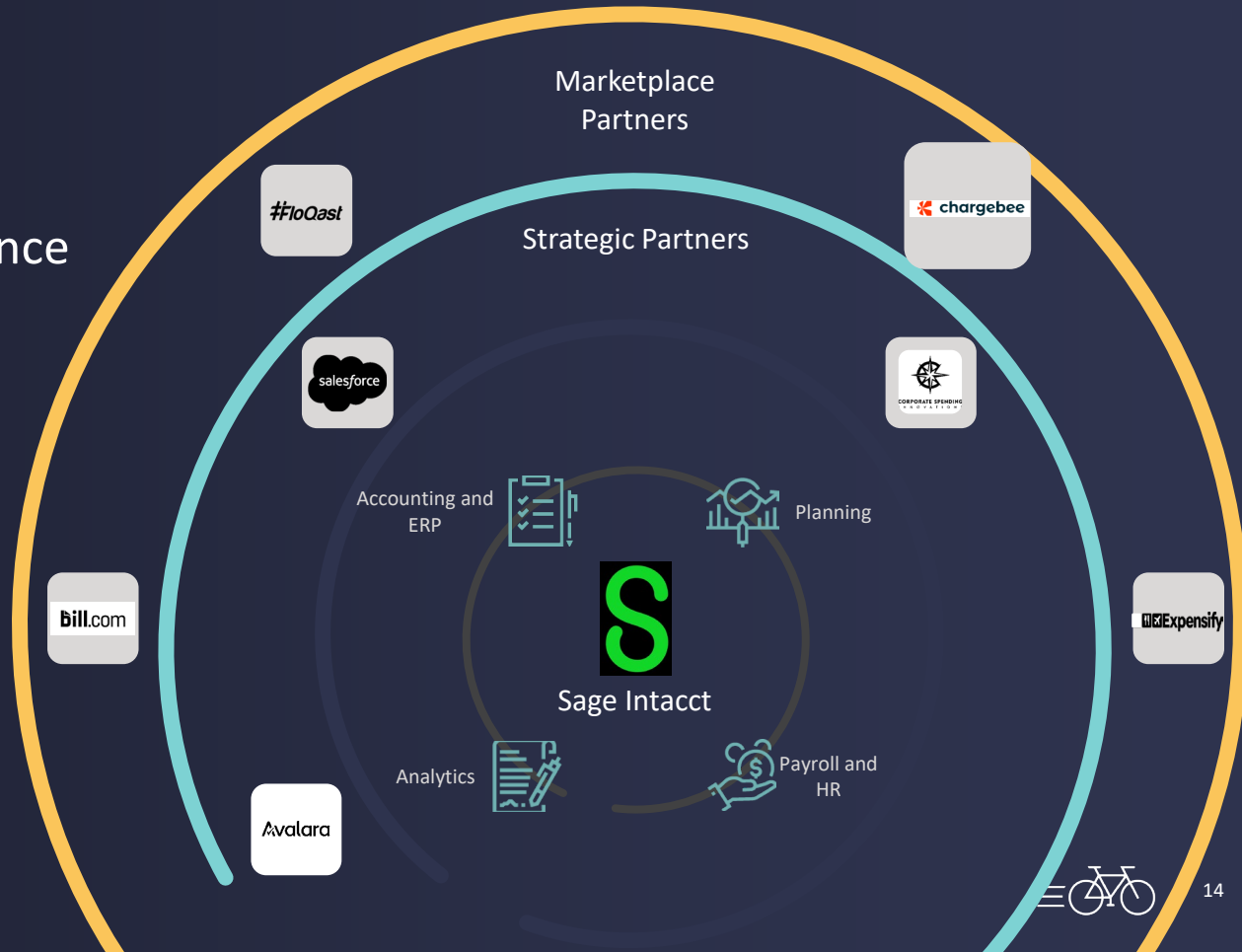
The singular FinOps infrastructure, from prospect to disclosure



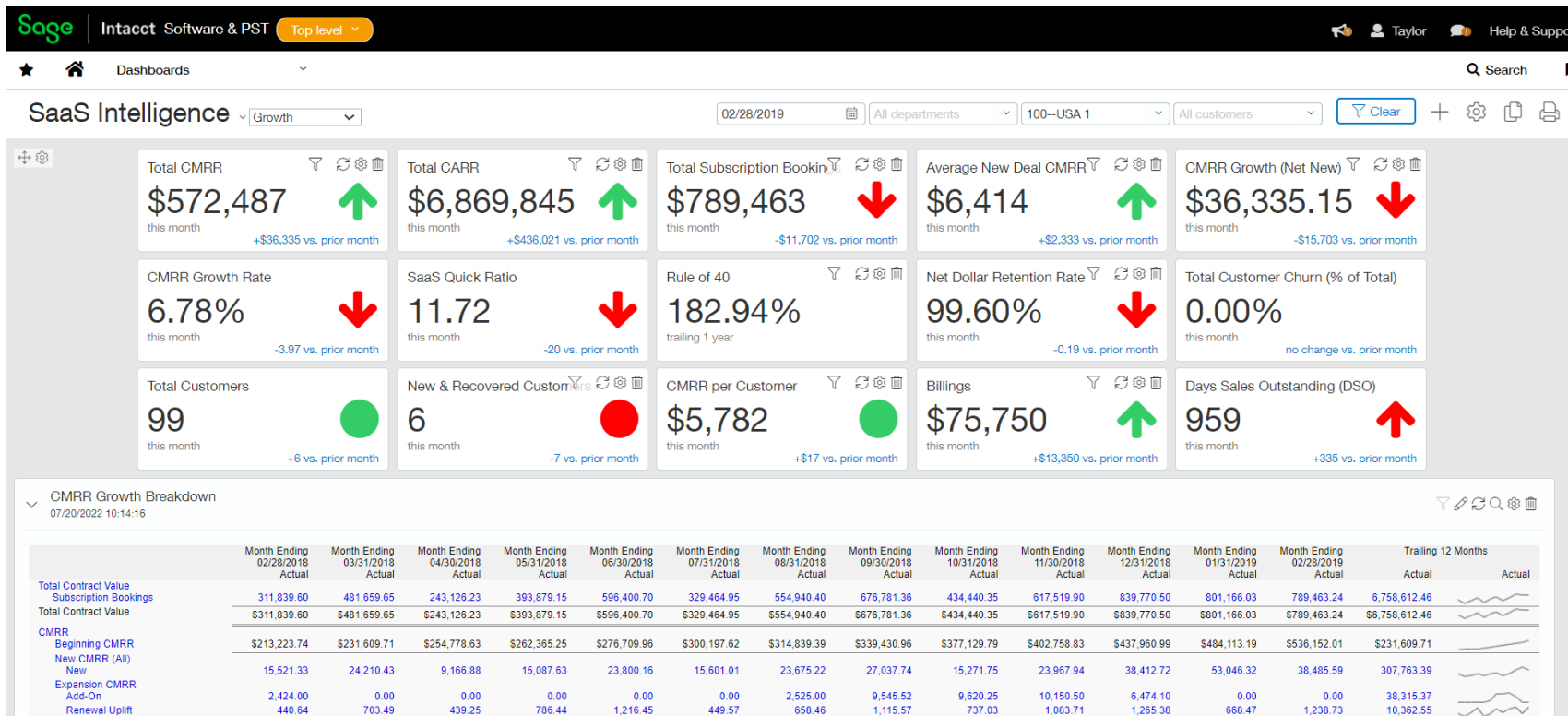
Sage Intacct

Seamlessly connected
where it matters most
for accounting and finance

Sage Intacct has a wide
variety of approved
Marketplace Partners



SaaS Metrics – a SaaS CEO’s Must-Have





Industry Leader Q&A



Signs QuickBooks Isn't Doing Enough?

Reports lack dimensionality

Managing multiple QuickBooks files for different entities

Consolidated reporting is all in Excel

Too reliant on Excel – revenue, prepaid expenses, fixed Assets

Billing to customers is manual and time consuming

Lack of proper internal controls

Sales tax compliance requirements are too complicated

Need dual book reporting, ie. GAAP vs. Non-GAAP





Sage Intacct Demo





Conclusion



Signs That You Are Ready For An Upgrade

- Outgrowing QuickBooks
- Too many spreadsheets
- Need system integrations
- Lengthy month-end close
- Issues with internal controls
- Automated workflows (PO/order entry)
- Robust reporting needs; visibility into finance
- Multiple locations or entities
- Allocations
- Revenue recognition
- Complex billing



Thank you!

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