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CPAs | CONSULTANTS | WEALTH ADVISORS

# AI-Powered Productivity for Education Leaders and the Power of Sage Intacct

October 28, 2025



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# Speaker Introductions



**Ellen Crispino**  
Consulting Director - Digital  
CLA



**Heather Johnson**  
Manager, Solutions  
Consulting - Nonprofit  
Sage



# Polling Question

Where are you on your AI journey?

- What is AI?
- Crawling: Adopting and exploring applications
- Walking: Implementing and learning
- Running: Innovating and accelerating



# Agenda

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Welcome and introductions

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AI in education finance: trends and opportunities

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Solving school finance challenges with Sage Intacct AI

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Live demo: AI-powered productivity in action

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Q&A and next steps

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# Introduction to CLA



A central dark blue circle with the text "CLA Promise" in white. Four teal-colored wedge-shaped segments radiate from the circle, each pointing towards one of the four surrounding text blocks. The background is a light teal color.

## CLA Promise

### 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.

### OUR FAMILY CULTURE

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

### OUR STRATEGIC ADVANTAGES

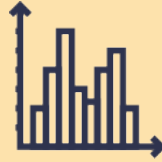
Deep industry specialization  
Seamless, integrated capabilities  
Premier resource for private businesses and owners  
Inspired careers



# How CLA Digital Helps Schools



Software systems and  
infrastructure



Data, automation and  
AI solutions



Cybersecurity and  
business risk

# Our Experience

## All CLA Service Lines

**2,100** Past and current K-12 school clients

**580** Charter school clients

**700** Independent school clients

## Sage Intacct Implementations

**2,000** Sage Intacct implementations

**100+** Private and Charter school implementations

**School Industry Lead** focused on school Intacct implementations, blogs and webinars



# Charter School

CLA understands that educators and administrators like you value innovation and creative thinking in the pursuit of your goals; so does CLA. Our professionals have been serving and learning from charter schools since the first authorizing laws were passed in 1991. We combine a deep understanding of today's educational environment with more than 50 years of finance and operational experience, bringing a fresh perspective to the challenges you face every day.

CLA serves **580+**  
charter schools including:

**ROCKETSHIP**  
PUBLIC SCHOOLS

**KIPP:Public Schools**  
NORTHERN CALIFORNIA

**KIPP:**  
**MEMPHIS**  
PUBLIC SCHOOLS

**KIPP:**  
**Nashville**  
PUBLIC SCHOOLS

**SUMMIT**  
**PUBLIC**  
**SCHOOLS**



**R**  
**REPUBLIC**  
**SCHOOLS**

 **Achievement First**





# How Can AI Be Applied to an Organization's Operations?



# State of AI in Modern Finance

## Traditional Finance AI vs. Generative AI

To understand how artificial intelligence is used in finance, let's compare generative AI and traditional AI.



Generative AI

Traditional AI

**The key takeaway:** both generative and traditional AI are essential for enhancing financial operations and driving growth.



# CFOs Have a Strong Appetite for AI



86 % of CFOs think AI will have a major impact on their role in the future



78% say implementing AI is crucial to their competitive edge.



79% anticipate AI will improve their revenue growth



77% say investing in AI in finance will help improve job satisfaction



57% have started using AI already or are using it extensively



25% think AI could help and are interested in learning more



57-64% of finance leaders are using ChatGPT or Gemini



43% using other generative AI tools



Biggest perceived benefits of AI are increased productivity & smarter decision-making





# AI-Powered Productivity in Sage Intacct



# Common Challenges in Schools

Lack of on demand help for your accounting system

Manual and time-consuming Accounts Payable process

Errors and anomalies often go undetected early

Overspending often goes unnoticed until month-end

Month-end close is slow and overly manual





# Search Help with Copilot



# Challenge: Accounting System Help Features

Staff waste time  
digging through help  
articles or  
documentation

New team members  
struggle to learn the  
system quickly

Finance teams rely  
heavily on IT or  
support for basic  
system questions

Time lost switching  
between systems or  
tabs to find help

Frustration with  
keyword-based  
search that doesn't  
understand context

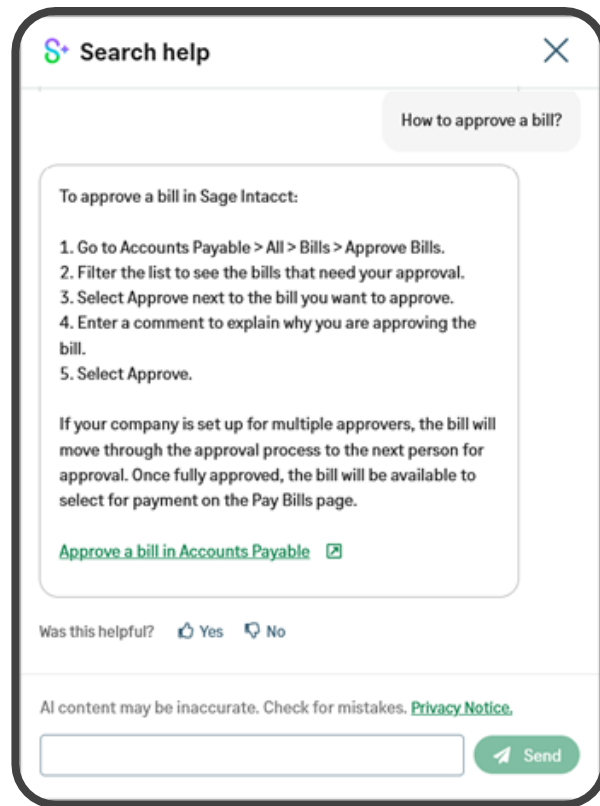
Inconsistent  
knowledge sharing  
across departments



# Search Help with Copilot

Ask and get answers to move forward quickly

- **AI-powered search**
  - Natural language understanding
  - Intelligent recommendations
- **Streamlined self-service**
  - Find answers on your own
- **Increased efficiency**
  - Significantly cut search time

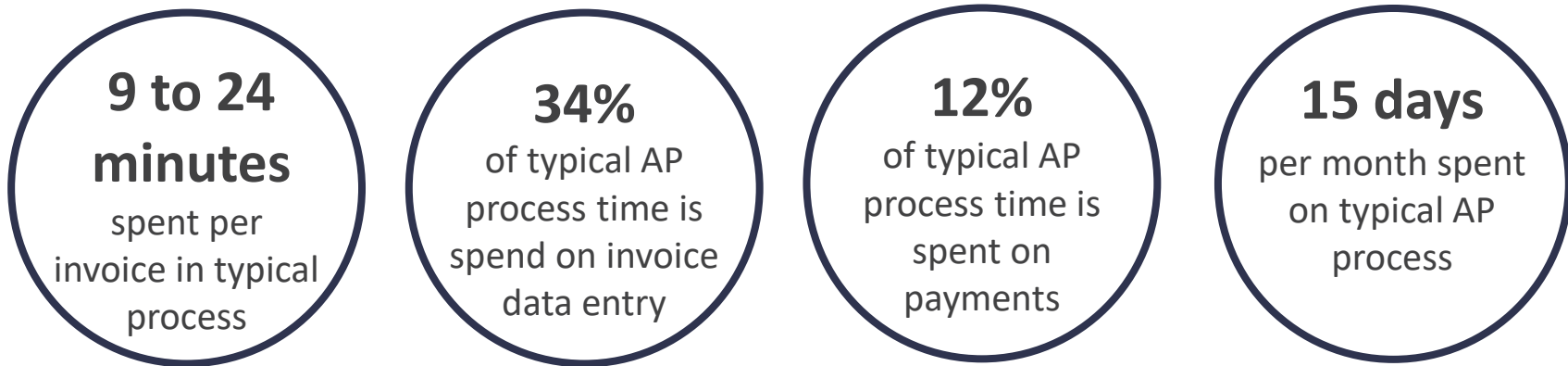




# AP Automation in Sage Intacct



# Challenge: Invoice Ingestion Is the Number One Pain Point in the AP Process



Bill automation has the potential to reduce processing time by up to **50%**, saving **2-5 days** per month for a typical organization

Source: Sage Intacct early adopter AP Bill Automation customers & IDC Infobrief: Digitizing Accounts Payable and Receivable to Boost Efficiency and Enable Growth, Doc#EUR149642122

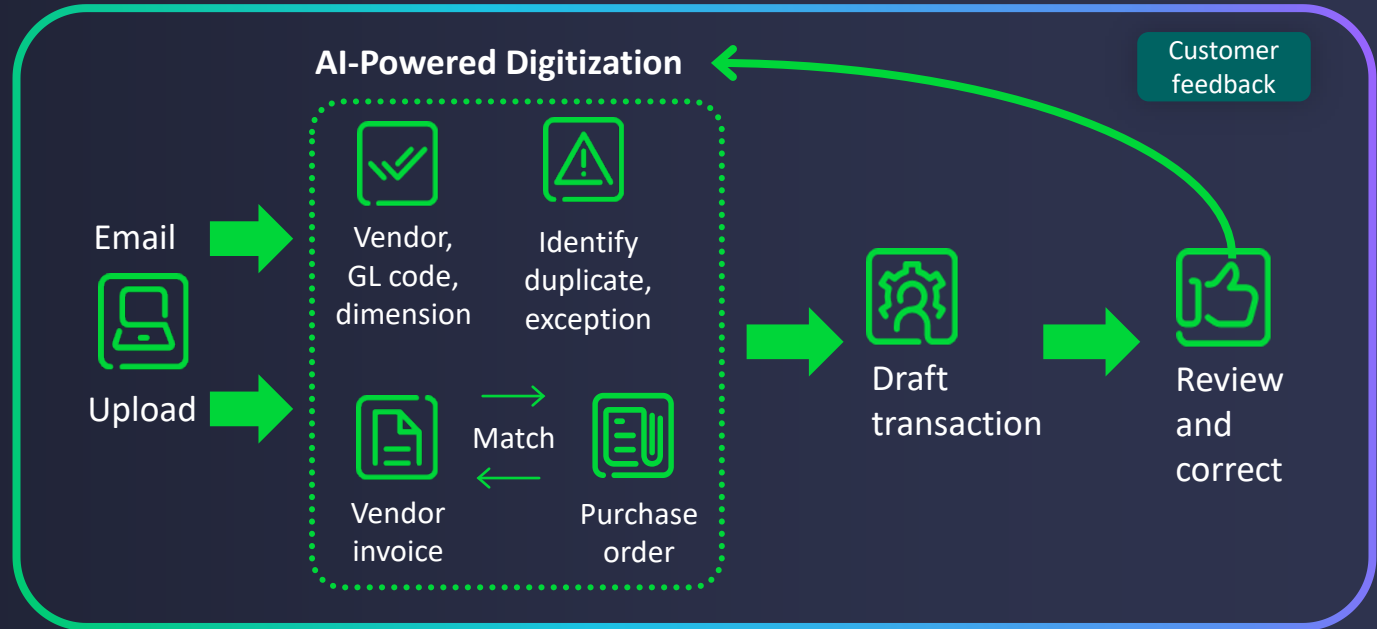
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# AP Automation

Ai

Streamline  
purchasing  
management  
with *AI-*  
*powered*  
*automation*



Accounts payable or purchasing > all > automated transactions



# Industry-Leading Accuracy

## Vendor Matching

95%

Accuracy predicting  
vendor > 1 month

## Extraction of new fields:



Tax



Currency



Tax Summary  
(EU)



Multi-language  
Support



PO Number

## Continuous Learning



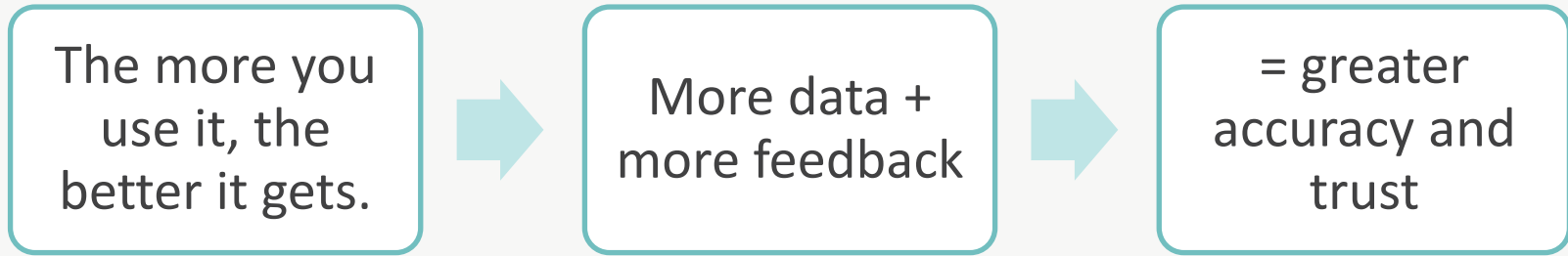
Personalized  
individual learning



Digital Network  
learning



# Designed for Trust





## Sage Intacct – GL Outlier Detection



# Challenge: Journal Entries

Errors in journal entries go unnoticed until audits or reconciliations

Manual review of entries is slow and inconsistent

Fraud risks due to lack of proactive anomaly detection

Difficulty identifying anomalies across multiple campuses or programs

Lack of historical context when reviewing entries

Time-consuming corrections after the fact



# 10-20% Of Journal Entries Require Correction

Date	Account Name	Debit	Credit
Feb 1, 2018	Cash	100,750	
Feb 28, 2018	Cash	100,750	
Mar 31, 2018	Interest Payable		750
Apr 30, 2018	Interest Expense	750	
May 31, 2018	Interest Payable		750
Jun 30, 2018	Interest Expense	750	
Jul 31, 2018	Interest Payable		750
Aug 31, 2018	Interest Expense	750	
Sep 30, 2018	Interest Payable		750

Nevada

Date	Account Name	Debit	Credit
Feb 1, 2018	Cash	100,750	
Feb 28, 2018	Cash	100,750	
Mar 31, 2018	Interest Payable		750
Apr 30, 2018	Interest Expense	750	
May 31, 2018	Interest Payable		750
Jun 30, 2018	Interest Expense	750	
Jul 31, 2018	Interest Payable		750
Aug 31, 2018	Interest Expense	750	
Sep 30, 2018	Interest Payable		750

California

Date	Account Name	Debit	Credit
Feb 1, 2018	Cash	100,750	
Feb 28, 2018	Cash	100,750	
Mar 31, 2018	Interest Payable		750
Apr 30, 2018	Interest Expense	750	
May 31, 2018	Interest Payable		750
Jun 30, 2018	Interest Expense	750	
Jul 31, 2018	Interest Payable		750
Aug 31, 2018	Interest Expense	750	
Sep 30, 2018	Interest Payable		750

Texas



Manual review of every transaction

Past experience is the typical gauge of accuracy



# GL Outlier Assistant

Harness AI/ML review to speed your time to accurate journal entries

General Ledger

Audit Adjustments Journal - Journal Entries

Unusual historical matchdate have been found; review the indicated outlier line(s). Total outlier count = 2

Transaction History

Transaction number 9  
Book(s) ACCRUAL  
Reference number --  
Last modified by Kgrace

State Submitted  
Journal AAJ  
Source entity 100-operating  
Last modified date and time 04/25/2019 13:30:12

Description Adjustments  
Posting date 03/31/2019  
Attachment Audit-JE-001

ENTRIES

	Doc	Outlier	Account	Allocation	Project or Grant	Department	Entity or Fund	Restriction	Site	Debit	Credit	Memo
1	--	Coding	1000--Sterling Bank - Checking	--	100--Stride for Sight	SP--Support	100--Operating	3--Unrestricted	Main	10,000.00	--	adjustment
2	--	*	5010--Data Center Fees	--	--	PS--Professional Service	100--Operating	--	Main	--	12,000.00	adjustment
3	--	*	6000--Benefits- Health Insurance	--	100--Stride for Sight	ENG--Engineering	100--Operating	--	Main	--	1,100.00	adjustment
4	--	Amount	6010--Benefits- Life Insurance	--	100--Stride for Sight	SA--Sales	100--Operating	--	Main	--	750	adjustment

For submitters to review outliers before sending to approvers

Submitted entries

No outliers – routed to approver

Outlier detected – return for review





# Close Automation



# Challenge: Closing the Books

**90**  
days

Finance teams take on average 7 working days to close the books each month, which amounts to 3 months, an average of 90 working days, each year

**3x**  
more  
time

On average, automating your financial close frees up 3x more time to focus on value-added activities

**24**  
days

You can save 24 working days each year by automating the financial close

**82%**

82% of finance leaders are saving on headcount costs through automation

**50%**

Over 50% of finance leaders have not yet automated processes around their top pain points

**18%**

Those with the least automation spend only 18% of their time on value-added tasks, while those with the most automation spend almost 58% on the same activities

**25%**

Companies on the cloud enjoy 25% more automation than their counterparts

**73%**

Of those not fully on the cloud, 73% are looking to move to the cloud in the next 2 years



# Close Automation

## Variance analysis

Automatically detects variances between actuals budgets and provides AI-generated explanations with drill-down access to supporting details and prior period comparisons.

- Speeds up variance review
- Delivers AI-generated, audit-friendly explanations
- Reduces back-and-forth between Finance and budget owners
- Supports faster, more confident reporting

## Close assistant

Tracks task completion across AR, AP, GL, and other close workflows, and proactively alerts users to delays, missing items, and dependencies.

- Keeps the close on schedule
- Improves visibility into task progress
- Reduces manual tracking and follow-ups
- Strengthens internal controls with audit trails

## Subledger reconciliation Assistant

Automates the process of comparing subledger balances to the general ledger and flags discrepancies in real time.

- Saves time by automating reconciliations
- Reduces manual errors and missed adjustments
- Rags mismatches early for quick resolution
- Generates audit-ready reports with full traceability

## Close Workspace

## Checklists and notifications

Structured templates, reusable checklists, task assignments, and proactive Copilot notifications to guide the close process.

- Standardizes the close across teams and entities
- Eliminates reliance on spreadsheets
- Ensures tasks are owned and completed on time
- Reduces risk of missed steps or late reporting

## Visibility and collaboration

Adds a centralized dashboard to track real-time close progress and enables in-task collaboration and sharing of Copilot-generated insights.

- Tracks progress across entities in one place
- Improves communication with in-task messaging
- Surfaces issues before they cause delays and completed on time
- Aligns stakeholders with shared visibility





## Let's See It in Action





# Is Sage Intacct Right for Your School?



# The Key Benefits of Sage Ai Tools for CFOs and Finance Teams



Increased efficiency



Enhanced accuracy



Real-time insights



Productivity



Compliance



Scalability



Cost savings



Improved vendor relationships



Enhanced security



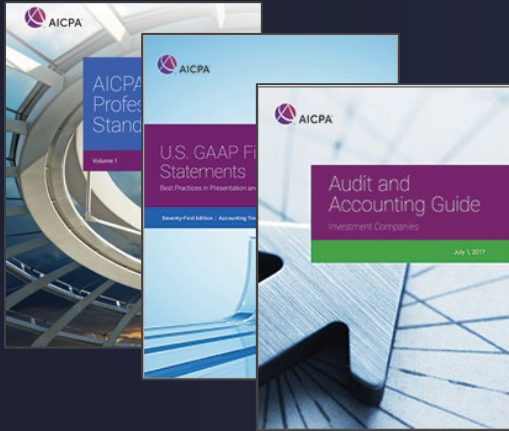
# Ten Recommendations for Implementing AI

1. Define the pain point.
2. Understand available tools.
3. Set realistic expectations.
4. Find a single-solution tool.
5. Improve external relationships.
6. Collaborate with IT and legal.
7. Track and fix issues.
8. Over-communicate results.
9. Start small.
10. Expand for broader impact.



# Sage Is The AICPA's Preferred Provider

The AICPA “wrote the book”  
on accounting



First and only preferred financial  
management solution of the AICPA  
since 2009



Partnering with AICPA to  
train Sage Ai models in  
2025+



# Is Sage Intacct Right for Your School?

Manual reporting (a lot of Excel)

Robust reporting needs

Lengthy month-end close

Multiple locations, entities, funds

Automated workflows/approvals

System integrations

Issues with internal controls

Allocations or project/grant billing

“Transitioning to Sage Intacct improved our financial management and reporting while reducing manual tasks. The integration with other systems created efficiencies we hadn’t thought possible. We’re thrilled with the results and CLA’s ongoing support.”

Tom Stanton, Chief Financial Officer



Trinity School

# Polling Question

Are you here today because you are looking to change software?  
If yes, how soon?

- Yes, I'm ready now
- Yes, I'll be ready in 3-6 months
- Maybe in the future
- I'd like to discuss other digital services from CLA





# Questions?



*Thank you!*

*Ellen Crispino*

Consulting Director – Digital, CLA

[ellen.crispino@CLAconnect.com](mailto:ellen.crispino@CLAconnect.com)

*Heather Johnson*

Manager, Solutions Consulting – Nonprofit, Sage

[heather.johnson@sage.com](mailto:heather.johnson@sage.com)



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