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AI-Powered Efficiency for Logistics Leaders: The Strength of Sage Intacct

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Speaker Introductions



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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

Welcome and introductions

CLA introduction and AI in logistics

Introductions to Sage Intacct for logistics organizations

Live demo: AI-powered productivity in action

Where to begin in your AI journey





Introduction to CLA and Sage Relationship



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



Our Experience

All CLA Service Lines

7,000+ current logistics
industry clients

1,500+
Transportation
clients

1,800+ Third-party
logistics, warehousing,
aviation, and maritime
clients

Sage Intacct Implementations

2,000+ Sage Intacct
implementations together

CLA Has 65+ Sage Intacct
Consultants

Logistics industry digitally
focused on implementations,
digital strategy, AI and
cybersecurity



How CLA Digital Helps Logistics Organizations



Software systems and
infrastructure



Data, automation and
AI solutions



Cybersecurity and
business risk

Sage & CLA present Accounting for Logistics



Agenda

Introductions to Sage Intacct for Logistics Organizations

Product Demonstration:

- Financial Reporting
- Automation
- AI

Customer Success & Implementation through CLA

Shifting gears: Overcoming industry challenges

Behind the scenes, businesses in logistics, trucking, and warehousing face mounting challenges you might already recognize:

- Soaring fuel costs and driver shortages
- Tighter delivery schedules
- Global supply chain disruptions from geopolitical and economic factors
- Rising demand for operational efficiency and seamless technology integration

The explosive growth of e-commerce and just-in-time delivery has amplified these pressures, leaving businesses to navigate:

- Fleet optimization challenges
- Warehouse efficiency bottlenecks
- The need for real-time visibility into financial and operational data

How can your business keep pace?

Modern cloud-based solutions like Sage Intacct empower businesses to overcome challenges and seize growth opportunities by streamlining operations and improving efficiency.

Get instant insights into fleet performance, warehouse efficiency, and financial health to meet industry demands.

Sage Intacct lets you:



Manage critical accounting processes like accounts payable and receivable



Track key metrics such as cost per mile, fuel expenses, and labor changes



Gain visibility into warehouse operations and inventory costs

By combining flexibility, connectivity, and scalability, Sage Intacct equips your business to thrive in a challenging industry.

See the full picture with Sage Intacct

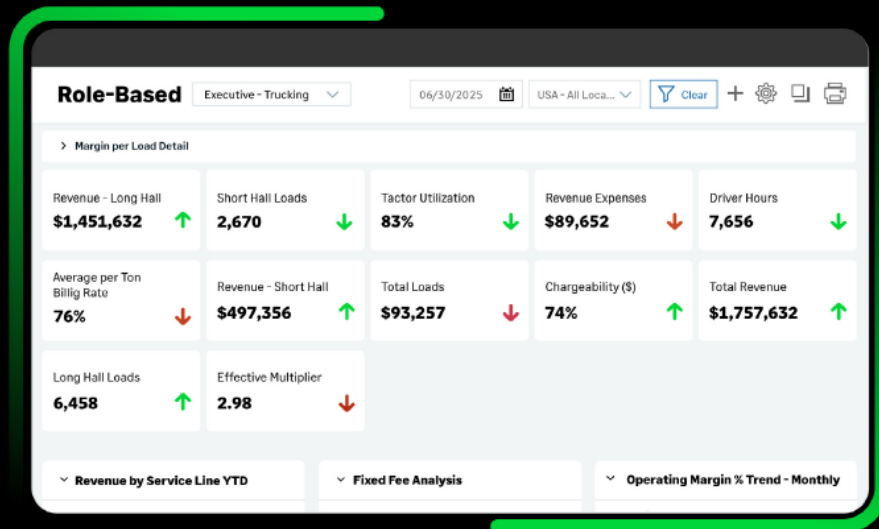
1. Real-time financial and operational insight

Say goodbye to outdated, siloed reporting. Sage Intacct delivers detailed, multi-dimensional financial and operational insight.

Key insights include:

- Cost per mile and delivery
- Fleet utilization metrics
- Warehouse maintenance and inventory expenses

Role-based dashboards ensure you always have a clear picture of your financial health, with precise forecasting and informed strategy.



Seamless growth, simplified operations

2. Streamline multi-entity management

Whether managing a single fleet or a multi-location warehouse network, Sage Intacct adapts to your needs.

Features include:

- Automation of inter-entity transactions and consolidations
- Streamlined reporting for compliance and audits
- Customizable workflows for approvals and tracking

Designed to scale with your business, Sage Intacct frees you to focus on strategic growth.



Connected workflows, smarter decisions

3. Seamlessly integrate with key industry tools

With over 200 third-party application integrations, Sage Intacct supports a unified system for managing your financial and operational workflows.

Integrations include:

- Dispatch and fleet management software
- Warehouse management systems
- Payroll and expense tracking tools

The open API ensures smooth data flow across systems, enhancing collaboration and maximizing efficiency.



Trucking and Logistics Companies Rely on Sage



Success story: Armellini Logistics



Leading the way in floral transport, solving complex challenges

Established in 1975, Armellini Logistics is a pioneer in time- and temperature-sensitive floral transportation. Managing multiple entities and vast operational data had become increasingly complex.

Faced with inefficiencies in their legacy accounting system, Armellini turned to Sage Intacct to streamline operations, improve visibility, and scale their business for continued growth.

Key results:

- **Integrated data from five entities** into enterprise-level reporting.
- **Reduced monthly close time by 75%**, from one month to one week.
- **Automated payment processing**, streamlining customer invoicing.



“Our move to Sage Intacct has allowed us to streamline all our accounting processes and gain visibility across all the company brands, making our data much easier to manage. With Sage, we can look at each entity as an entire company.”

Rosanna Winningham
Director of Corporate Services, Armellini Logistics



Product Demonstration





How To Start My AI Journey?



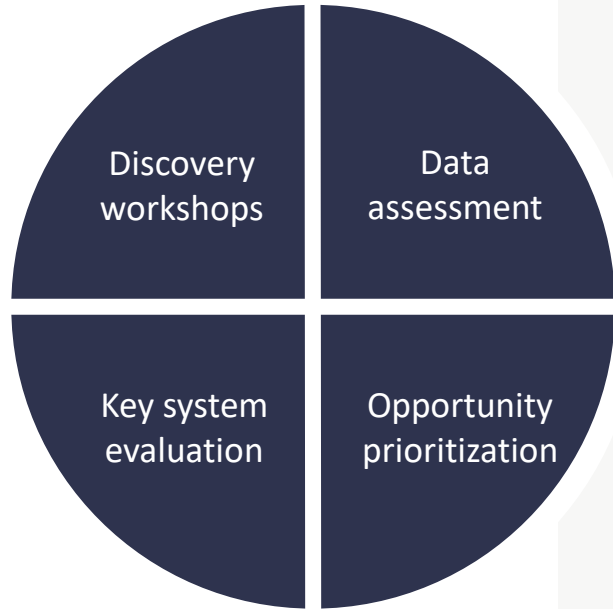
Polling Question

Do you have a Digital Roadmap in place?

- Yes, actively following it!
- Yes, but not 100% committed
- Maybe
- No, we do not

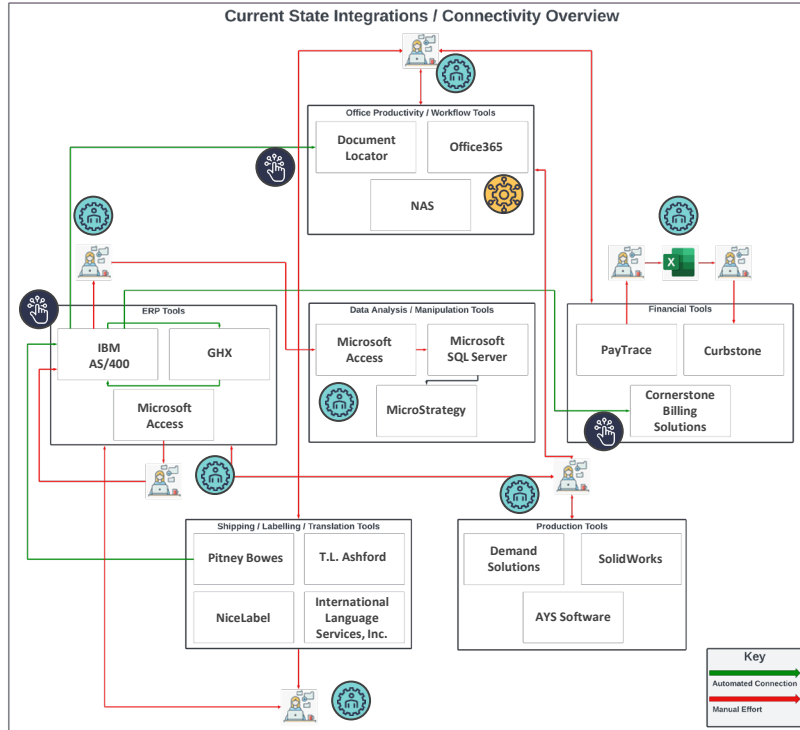


Let Us Help Build Your Digital Roadmap



Digital Current State Overview

CLA has documented the current state systems diagram and outlined the associated key observations below:



Limited systems integrations

- Several core systems have existing integrations in place facilitating streamlined workflows
 - Still opportunity to enhance integrations to support optimal workflows
 - Optimizing ERP platform will reduce much complexity and cost

Manual effort and data manipulation required

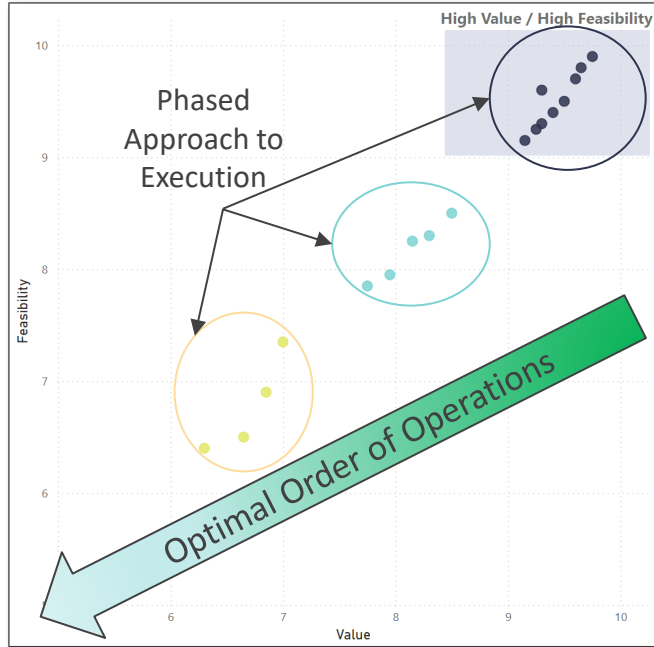
- Numerous observed points of required manual data extraction / manipulation that can potentially be automated / streamlined
- Credit card solutions require manual exports from 1 system and upload to another

Office productivity platforms represent consolidation opportunity

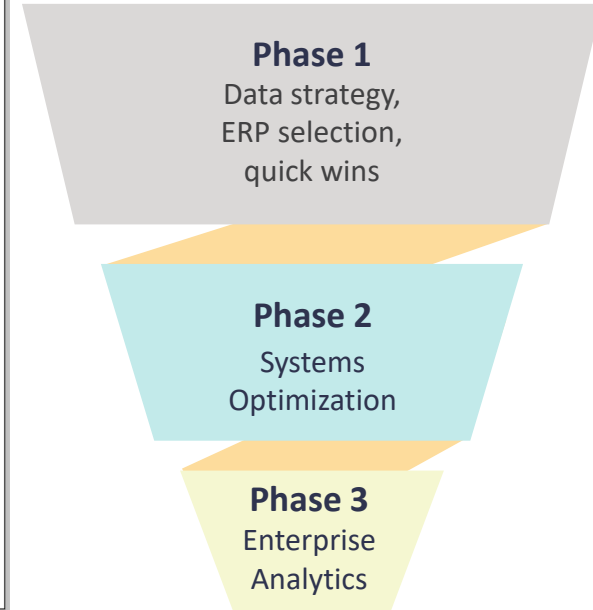
- Office 365 represents opportunity to consolidate document storage, workflow management, internal file sharing / collaboration and knowledge management repository and analytics solutions into single platform

Use-Case Prioritization Matrix

Having identified and aligned the core digital opportunities for the client, CLA has developed the following matrix to prioritize use-cases that will enable the organization to execute a tactical roadmap to support its digital journey.

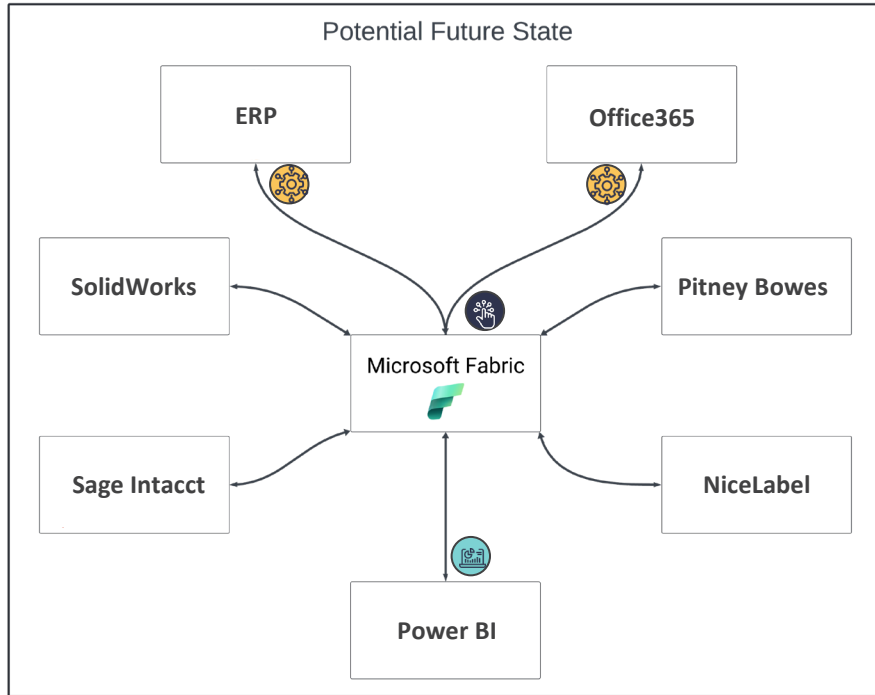


Use-Case Name	Value	Feasibility
KPI Identification	High	High
KPI Consolidation	High	High
KPI Segmentation	High	High
Data Calendar	High	High
Prioritize Dashboard Needs by Function & Deployment to the Organization	High	High
Migrate Access DB to Supported Version	High	High
Conduct ERP Evaluation & Selection Exercise	High	High
Implement Microsoft CoPilot	High	High
SQL Server Health & Performance Scan	High	High
Implement Modern ERP Platform	Medium	Medium
SharePoint Build Out	Medium	Medium
Consolidate Duplicative Use-Case Systems to Reduce Complexity	Medium	Medium
Develop Power Automate Flows to Support Workflow Automation Across the Organization	Medium	Medium
Document SOPs as They Relate to Core Systems Use	Medium	Medium
Design, Build & Deploy Production Data Warehouse Solution	Low	Low
Consolidated BI / Reporting Development	Low	Low
Self Service Analytics	Low	Low
Ad-Hoc Reporting	Low	Low



Potential Future State Diagram

Once the identified tactical use cases have been implemented, the organization will be able to realize the future state systems and architecture diagram detailed below:



Scalable systems integration and connectivity

- Centralized data repository provides opportunity for far wider systems integration, multi-directional data transfer, conditional workflow driven logic and broader automation support to facilitate efficiency



Automated insights and operational reporting

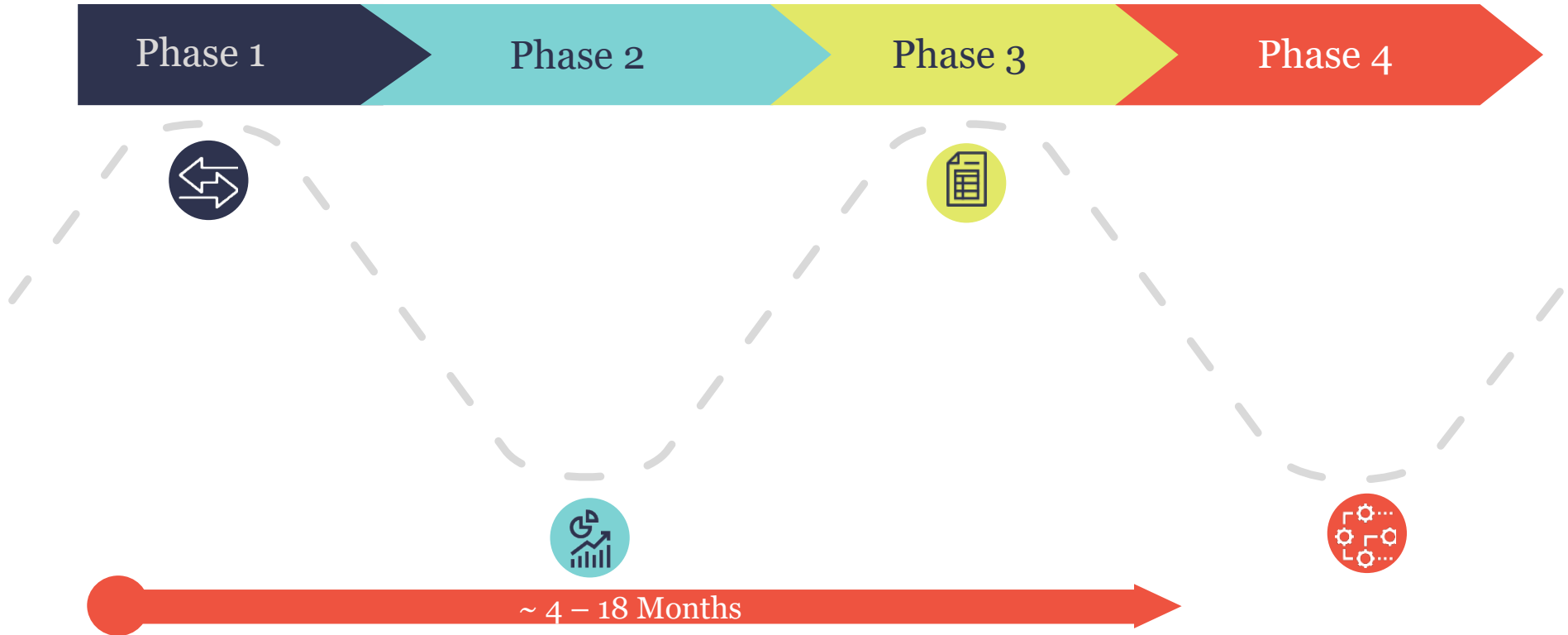
- Scheduled refresh capabilities will provide access to more timely insights while minimizing effort required to derive insights
- Custom tailored reports / visuals will support specific teams, departments and organizational functions with KPIs needed to drive performance



Numerous redundant systems eliminated

- Fewer core platforms required to operate effectively day-to-day
- Potential elimination of: DMAS, PayTrace, Curbstone, CornerStone, TL Ashford, Demand Solutions, AYS Software, Access

Roadmap and Go-Forward Plan



Thank you!

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