

DIGITAL PILLAR GUIDE: SOFTWARE

# IS IT TIME TO UPGRADE YOUR FINANCE PLATFORM?

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# When finance systems lag, growth does too.

As businesses grow, outdated finance tools can start to create friction. Close cycles drag on, reporting takes longer than it should, and integrations break when the business adds new systems. What once was “good enough” accounting software can become a roadblock as complexity and expectations rise.

At that point, the question isn't whether to modernize — it's when. Downtime, rework, and blind spots add up quickly when a system can't keep pace.

A modern finance platform serves as the operational core, connecting budgeting, reporting, approvals, integrations, and internal controls. Moving to the right platform can save months of manual work and give leaders the visibility they've been asking for.

## What you'll take away from this guide

- How to recognize when your current system is slowing the team down
- How Sage Intacct and Acumatica support reporting, workflows, and growth plans
- A practical path from evaluation to implementation, including data migration and adoption



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# Five signs it's time to upgrade your finance platform

Most leaders don't wake up one day and say, "Let's replace our finance system." The challenges build gradually until they become impossible to ignore.

## 1 Month-end drags and decisions arrive too late

If your team spends more time closing the books than using the numbers inside them, your system is holding you back. When key metrics come out a week or two late, leaders end up making decisions on stale information, or worse: guessing.

## 2 Multi-entity consolidation is painful

Whether you're adding new entities, expanding across locations, or managing programs with separate reporting needs, manual consolidations drain hours and increase the chance of errors. Growth shouldn't mean building more spreadsheets.

## 3 Reports live in spreadsheets, not your system

If every critical finance report requires exports, formatting, and offline manipulation, your system isn't doing its job. A strong platform should generate executive-ready reporting inside the tool, not force your team into late-night spreadsheet gymnastics.

## 4 Integrations break or require rekeying

Disconnected systems create duplicate work, inconsistent data, and avoidable mistakes. If your CRM, payroll, banking, logistics, or donor systems don't connect cleanly, finance ends up stitching everything together manually.

## 5 Audit and controls strain under growth

As your business scales, so does scrutiny. If you find yourself scrambling during audits, chasing evidence, or trying to patch weak controls, it may be a sign your current system can't support where you're headed.





# Why the right software fit matters

Choosing a finance system isn't about features on a checklist.

It's about aligning your operating model, reporting needs, and integration footprint with a platform built to support them. Both are strong platforms suited to different needs, and we help you align reporting, integrations, and controls to the right choice with a clear, low-risk go-live plan.



## Sage Intacct

Built for strong financial management and reporting. Its robust dimensional structure gives teams the ability to slice and view data without building brittle spreadsheets. Nonprofits in particular appreciate its built-in support for fund accounting, grant tracking, and program visibility.

## Acumatica

A flexible cloud ERP built to support broad operational workflows. Manufacturing, service, logistics, and multisite organizations often gravitate toward Acumatica because of its open APIs, easy integrations, and broad operational workflows.



# The path to building a strong cybersecurity foundation:

Scope → Build → Adopt

## Scope

2 – 3 weeks

This is where clarity starts. By documenting entities, chart of accounts, required reports, approval flows, internal controls, and all connected systems, teams often uncover hidden bottlenecks — addressing them early makes the rest of the project far smoother.

- Your chart of accounts
- Required reports
- Approval flows
- Internal controls
- Every system that needs to connect — CRM, bank, payroll and HR, logistics, grants and donors, or others

## Build

60 – 90 days

Your system takes shape — core configuration, data migration, security roles, and initial reporting packs. This is where outdated processes are cleaned up and replaced with something more structured.

## Integrate

Parallel

Integrations run alongside build. By focusing on the priority connectors first, you get early analytics rather than waiting months for automation and real-time visibility.

## Adopt

30 – 60 days

Training, user acceptance testing, and go-live support turn the system from “software” into “how the team works.” Report burndown — transforming disconnected worksheets into built-in dashboards — happens here too.



# Why milestones matter

A project like this becomes easier to lead when everyone can see what progress looks like.

Clear checkpoints help establish traction, give executives confidence, and let the team know what's coming next.

## By day 30:

- Fit confirmed
- Implementation plan accepted
- Timeline locked down

## By day 60:

- Core configuration in place
- First data migration complete
- Initial integration connection points ready

## By day 120:

- Software is typically live at this point

With dashboards, reporting packs, and focused support to help the team settle in, controls strengthen, reporting speeds up, and manual work starts to fall away.



# Industry-specific moves

Not every organization needs the same starting point. These are examples of industry-driven needs and outcomes we've seen addressed during new software adoption.

- **Manufacturing** — Support for ERP and shop floor visibility, accurate inventory, and margin clarity by product and line. Better control of the production cycle leads to cleaner reporting.
- **Nonprofit** — Grants and program reporting, fund restrictions, donor visibility, and board dashboards all become far easier to manage with the right platform.
- **Financial services** — Tighter controls, cleaner reporting, and integrations to core/CRM systems help leaders get earlier insight with less operational drag.
- **Health care** — Support for patient billing and compliance workflows, integration with EHR systems, and real-time visibility into payer reimbursements. Better control of revenue cycle and cost tracking leads to improved financial clarity.
- **Retail** — Omnichannel inventory management, POS integration, and margin analysis by product category. Streamlined order-to-cash processes enable accurate forecasting and faster close cycles.



# Industry-specific moves

- **Construction** — Job-costing visibility, project-based financial tracking, and integration with scheduling tools. Enhanced control over WIP reporting and subcontractor payments helps reduce overruns and improve profitability.
- **SaaS** — Subscription billing automation, deferred revenue recognition, and integration with CRM for churn insights. Real-time dashboards enhance ARR visibility and investor reporting.
- **Professional services** — Time and expense tracking, project profitability dashboards, and resource scheduling and utilization metrics. Integrated and automated workflows can help reduce billing delays and strengthen client transparency.
- **Higher education** — Grant and endowment/fund accounting, tuition billing, and donor management integrations. Improved reporting on endowment and restricted funds and compliance help maintain audit readiness and stakeholder trust.
- **Logistics** — Fleet and route cost tracking, warehouse inventory visibility, and integration with TMS/ERP systems. Real-time data can help improve margin control and enhance delivery performance.
- **Real estate and private equity** — Property-level financials, investor and consolidation reporting automation, and integration with portfolio management tools. Enhanced visibility into cash flows and valuations supports strategic decisions.

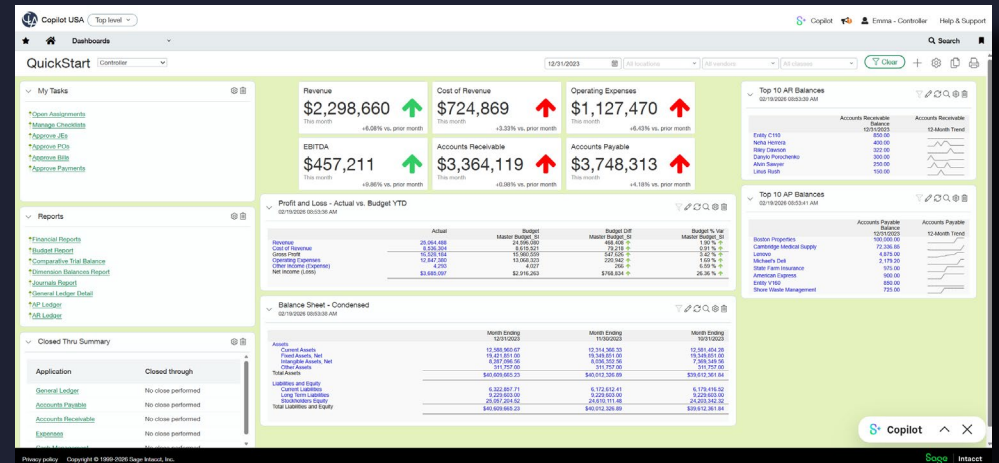


# Metrics that matter

Visibility improves when you track the right numbers.

These metrics tell leadership whether the new software platform is doing its job and where the team gains back the most time.

- **Close time and time to report** — These two metrics reveal how quickly your finance team can turn raw activity into actionable numbers. Shorter close cycles reduce lag between what's happening in the business and what leaders can see.
- **Percentage of automated reconciliations** — How much of your workflow is system-driven versus manually touched? A rise in automation directly reduces errors, cuts rework, and smooths the close.
- **Integration health (error rates and retry success)** — Tracking how often integrations fail, how quickly they recover, and how many records need manual correction helps you see whether the data flow is steady or shaky.





# Common pitfalls

Even with the right intentions, finance system projects can stall. Watch for these common traps.



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## “Lift and shift” habits

Carrying old processes into a new system only recreates the same problems. Modernizing workflows early prevents rework later.



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## Underestimating integrations

A clean design upfront can prevent late-stage surprises.



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## Treating reporting as an afterthought

When reporting is built alongside configuration, teams hit the ground running instead of rebuilding spreadsheets after go-live.



# Software migration checklist

A checklist keeps everyone aligned on the essentials: what needs to be done, who owns it, and what success looks like. Use it to align executives, clarify expectations, and keep the project moving.

- **Define five “must-have” reports for Day 1** — Identify the core reports leadership relies on — executive packages, monthly dashboards, funding or project visibility, consolidations, or margin insights.
- **Agree on integration map and data contracts** — Document each system that needs to connect — CRM, payroll and HR, banking, logistics, donor systems — and define what data moves, how often, and who owns it.
- **Draft roles and permissions** — Draft role-based access early so approvals, segregation of duties, and sensitive data protections are built into the configuration rather than added later.
- **Create an adoption plan and schedule training and communication** — Plan training sessions, communication touchpoints, and a simple way for users to get help during the first 90 days. This reduces disruption, builds confidence, and speeds up the transition from “new system” to “daily routine.”



# From intent to impact

You've seen the signals, the platform paths, and a practical way to move from scoping to go-live. The goal is simple: faster reporting, stronger controls, and cleaner integrations without months of churn. The first step is a short conversation that ties your goals to a clear plan.

## Take the next step on your software journey

A digital readiness assessment helps define your current state, explore opportunities, and outline a tailored roadmap for digital initiatives. It can identify how process improvements, system integration, and collaboration may enhance future outcomes — serving as a practical first step toward success.

When you're ready, CLA can also provide a software walkthrough tailored to your goals; an honest assessment of whether Sage Intacct, Acumatica, or another software fits; and a draft timeline and budget that reflect your systems and reporting needs.

Schedule your digital readiness assessment today.



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*We'll get you there*

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