E-book

10 ways Sage Intacct helps SaaS CFOs catalyze growth

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The modern CFO is tasked with driving strategic growth at scale

As the finance leader of a SaaS business, you need so much more out of your accounting and billing software. The tools you use to bill customers and keep tabs on cash flow will have ripple effects across your business, from raising your latest round of funding to managing day-to-day operations.

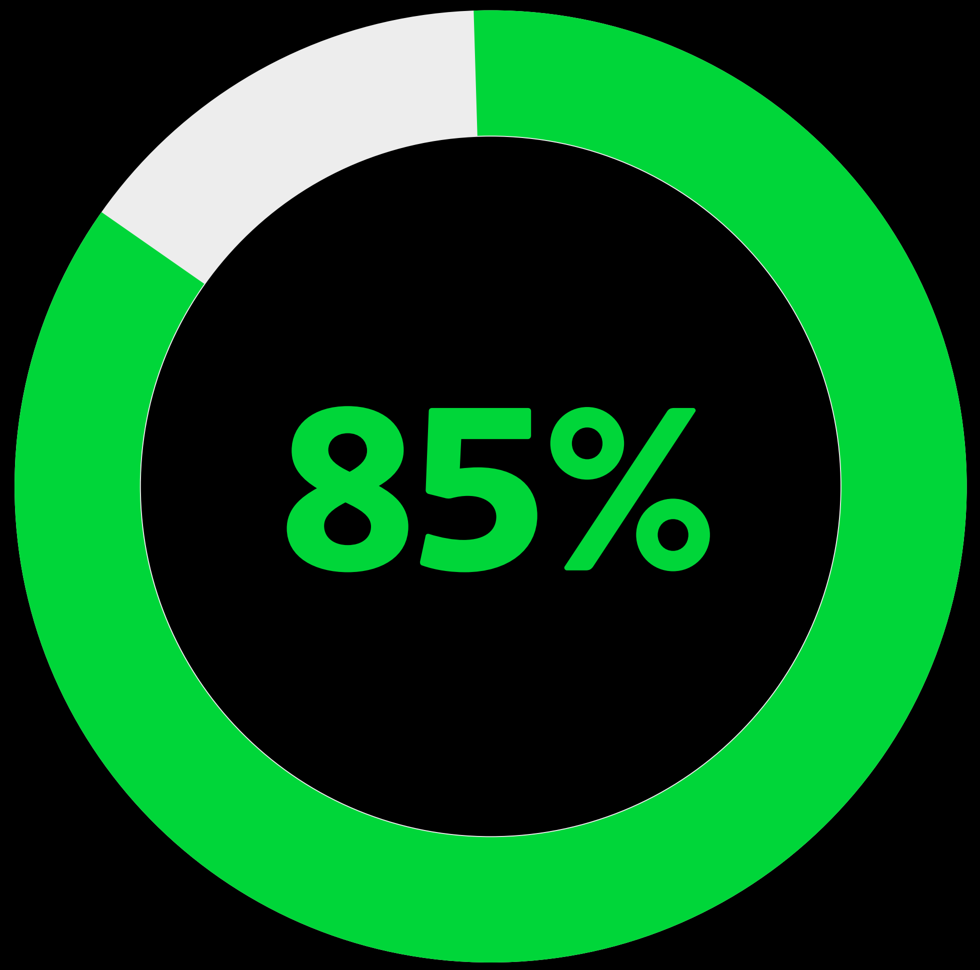
After all, you're not "just" the money person. You're responsible for driving growth, with a role that extends beyond financial management into high-level strategy. That's why it's important to choose software that supports your business at every stage, taking you from wherever you are now to wherever you want to go — including growth at scale, IPO, and beyond.

Read on to discover the top 10 ways Sage Intacct's powerful automated accounting tools can help you drive business growth.

1

Leverage SaaS AND finance expertise

Get fast ROI and an optimized project plan that delivers from day one.



of our Professional Services staff are CPAs or former CFOs

Sage Intacct's purpose-built accounting software delivers speed, efficiency, and internal controls for every stage in the SaaS lifecycle, from early stage, to pre-IPO, to public. As a SaaS company ourselves, we understand the unique needs and workflows of fast-growing subscription-based companies.

With our laser-focused expertise and customer-first roadmap, we've helped thousands of SaaS businesses:

- Simplify billing and increase cash flow
- Shorten close time while growing their customer base
- Consolidate multiple accounting entities in minutes
- Turn data into actionable insights
- Maximize performance at scale

"I wanted to choose something I could believe in that was **built for SaaS companies.**"

Zach Blaine, Controller, Expel

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Streamline implementation and shorten time to value

So easy to use, your whole team can hit the ground running.

As a strategic partner to operational leaders, you need a system that's sophisticated enough for complex billing scenarios but easy to understand at a glance. Sage Intacct builds efficiency and time savings into everyday processes with an intuitive interface to facilitate speedy adoption and cross-functional alignment.

Why users love Sage Intacct:

- Customizable checklists, workflows, and reports
- 300+ native billing scenarios
- In-product support and user-friendly interface
- Accessible anywhere on desktop and mobile

“ We chose Sage Intacct’s AICPA award-winning platform over Oracle NetSuite, Microsoft Dynamics, and Blackbaud Financial Edge because it was the easiest to use, and every accountant and auditor we talked with absolutely loved the system.”

Chace Holland, Director, Grammy Museum Mississippi

3

Make better decisions, faster

Access real-time metrics to unlock profitable growth

Integrating Sage Intacct with the rest of your tech stack gives your teams direct access to a single source of truth. Choose from hundreds of integrated reports, including SaaS-specific metrics and dashboards, or customize your own to meet the unique needs of your business. Adjusting forecasts to meet investor requests is so easy, you can do it on the fly — even during a live meeting.

With Sage Intacct's interactive reporting and dashboards, you can:

- See your current cash balance, unbilled, billed, and paid balances in one click
- Avoid a backlog with automated dashboard or report delivery
- Say goodbye to spreadsheets and easily analyze data, from macro to micro
- Incorporate AI and machine learning into your budgeting and forecasting
- Project trends to prove lasting growth for a higher valuation

“ We make a change in Salesforce and the data is instantly updated in Sage Intacct, and vice versa. **We now have a centralized repository for all our front-office and back-office data.**”

Kent Hudson, CEO and Co-Founder, Dude Solutions (acquired by Clearlake)

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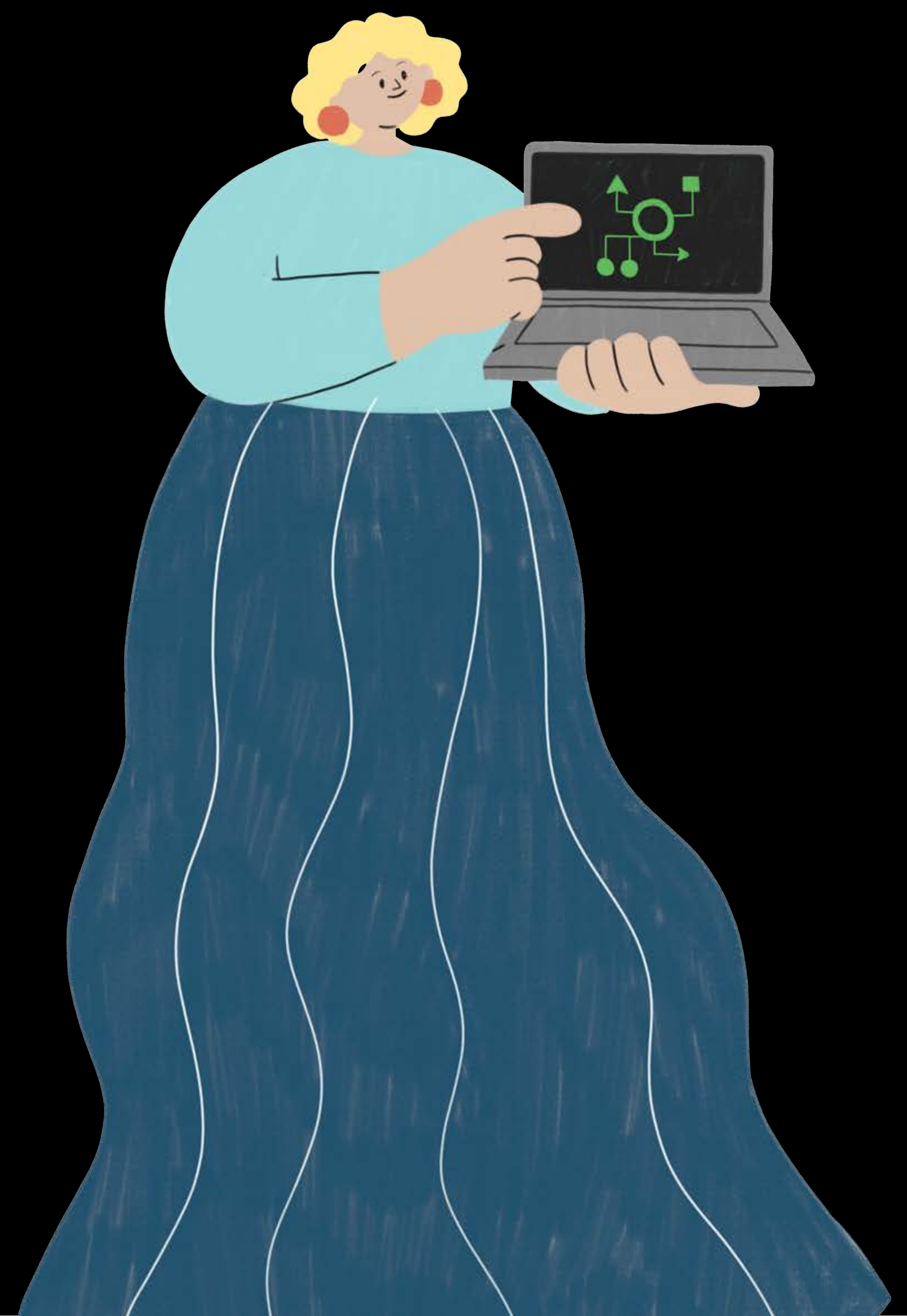
Automate for maximum speed and efficiency

So easy to use, your whole team can hit the ground running.

Automate day-to-day accounting and free up your finance team to focus on improving business performance. The Sage Intacct SaaS tech stack connects financial and organizational workflows, leveraging the power of AI and integrating with best-in-class solutions via our open API.

Automated data collection and processing for:

- New customer onboarding
- Multi-entity consolidations
- Continuous close



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“ With Sage Intacct, our financial close was cut in half. We’re saving five days of work for four people, which gives us back 20 days of work each month that we can put into more strategic activities. ”

Project Accountant, Yardstick (now Proctor U)

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Prepare for your IPO

Scale growth with predictability.

Compliance isn't easy to scale, especially during periods of rapid growth. Manually tracking orders and billing is unsustainable, and risk goes up as invoice tracking and net revenue insights deteriorate.

With Sage Intacct, you can automate key processes like:

- Linking deferred revenue accounts with associated contracts and transaction updates
- Forecasting for billings, cash, and revenue
- Handoff of budget-to-actuals data to business leaders

$67B **in market capitalization recently went IPO on Sage Intacct**

Customer snapshot

Thanks to Sage Intacct's core financials, automated subscription billing, and Salesforce integration, SaaS company Acquia was able to:

- ✓ Reduce financial close from 10 days
- ✓ Cut order-to-bill processing time by 50%
- ✓ Reduce deferred AR balance by 33%
- ✓ Reduce DSO by 10%
- ✓ Reduce cash forecasting variance by 80%
- ✓ Increase operational cash by 10%
- ✓ Achieve ASC compliance

> “ Now we know whether we are well-positioned to invest and expand into new markets or regions, pursue potential acquisition targets, relocate offices around the globe, adjust pricing models, or increase our investment in key products that will be **easier to sell and boost customer lifetime value.** ”

Brett Belcastro, Revenue Controller, Acquia

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Dedicated partnership with an investment in your success

Gain peace of mind with our industry-leading services and guarantees.

- Our detailed SLA is one of the strongest in the industry
- In SaaS, one size never fits all. We partner with you to create a roadmap based on your company's vision of long-term success and assist you through every stage of your journey
- Rest easy knowing that your accounting software is consistently secure, reliable, and available

99.8% guaranteed uptime

Get a credit of 10% for each percentage point you experience below the uptime availability target, up to 50% of that month's subscription fees.

Disaster recovery
In the unlikely event of a disaster, applications will be available within 24 hours with no more than four hours of missing data.

Data ownership
You own your data, and you can download it any time. If you ever decide to leave Sage Intacct, we'll help you retrieve your data from our systems.

Professional services quality
We strive for 100% satisfaction. If we fail to meet the budget and timeline of our shared statement of work, you're eligible for a 10% credit.

Source: https://www.sageintacct.com/trust-sageintacct

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Stay compliant and **minimize risk** with transparent reporting

Built-in GAAP, ASC 606, and IFRS 15 support.

From quote to cash, Sage Intacct provides a single subscription system of record for real-time billings, revenue, expenses, cash, and entities data. Complete your compliance story with GAAP and front- to- back-office audit trails. If an IPO is on your roadmap, we'll provide the framework you need to reduce your risk and help meet segregation of duties, internal controls, and SOX compliance requirements.

Sage Intacct is the AICPA's only preferred financial application provider. AICPA is one of the largest accounting industry member associations in the world, with over 431,000 members in 122 countries and territories.

8

Slice and dice data like never before

Craft a compelling value narrative.

Give your teams the data they need to make strategic and financially sound decisions. Armed with customizable dashboards that can show real-time spend, gross profit, and trendlines, teams across the business can spot opportunities or usage declines early enough to take swift action.

At-a-glance KPIs populated with real-time data are accessible anytime, anywhere — including mobile

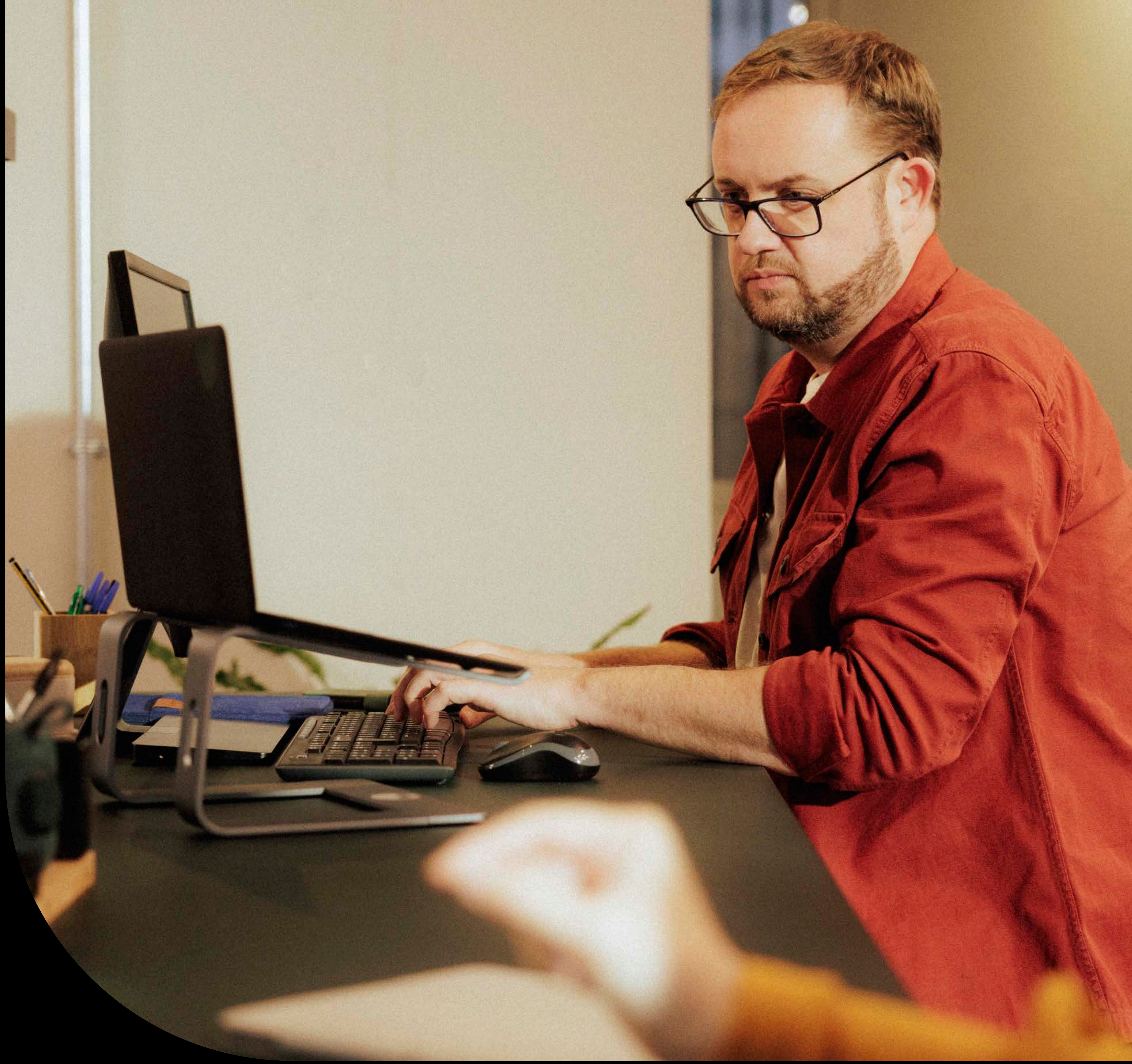
See all your financial and operational data in one place, helping to automate financial reporting, consolidate entities, or drill into custom dashboards

Native SaaS metrics include real-time data on CMRR, CAC, churn, CLTV, upsells, renewals, and more

Generate one-click investor reports and detailed growth forecasting

“ I pushed hard to bring on Sage Intacct to report data at the department, product, location, project, and employee level. I knew what the software was capable of and wanted to bring that to ActiveCampaign.”

Tim Compton, Sr. VP Finance, ActiveCampaign



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Cloud-native tech to lead your digital transformation

Never worry about version control or expensive upgrades.

With over 20 years of cloud experience thanks to our early innovations in cloud-based financials, Sage Intacct continues to lead the industry with cutting-edge technology like machine learning models and AI. The future isn't on our roadmap — it's already here.

- Integrate with your favorite payroll, CRM, or homegrown systems through our digital connections and open APIs
- Get the latest AI updates to capture the speed, accuracy, and insights that launch your business to the next level

“ As a finance team, we have the ability and insights to **predictably and profitably scale the company,** without simply throwing bodies at the problem.”

Peter Benevides, SVP Finance, Olo

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10

Get a leg up with the #1 in subscription billing software

Stay ahead of the curve with software SaaS companies love.

Industry accolades:

- Highest product score in core financials for lower midsize enterprises for the last 4 years (Gartner)
- Leader in Worldwide SaaS and Cloud-Enabled Mid Market Finance and Accounting Applications (IDC MarketScape)
- Major Player in Worldwide SaaS and Cloud PSA ERP Applications (IDC MarketScape)

How customers rank Sage Intacct:

#1 in customer satisfaction for mid-market ERP systems for 5 years in a row

#1 in B2B subscription billing and revenue management software

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“ Sage Intacct has had a positive snowball effect for us. **We are much more efficient** and that allows us to report as a public company.”

Megan Stichter, Controller, appfolio

Sage Intacct is made for SaaS

[list graphic to be developed]

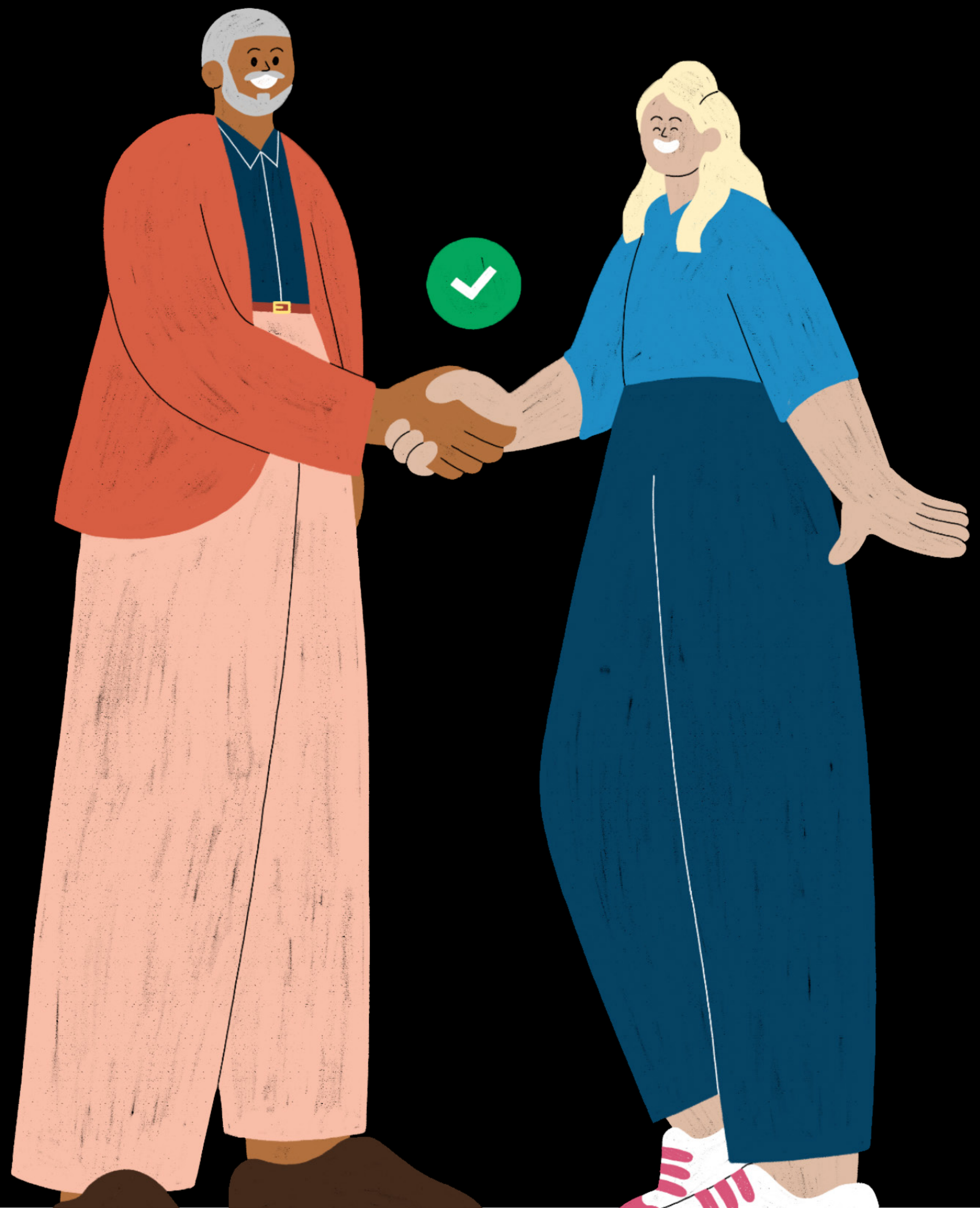
Finance:

- Dimensional tagging for user-defined data analysis
- Multi-entity management with 1-click consolidations
- Dimensional, AI-powered Intelligent GL
- Cash flow forecasting
- Built-in ASC 606, IFRS 15, GAAP, SOX support
- Automated workflows
- Process checklists
- Outlier detection
- Multi-currency
- SaaS metrics
- Sandbox

FinOps and RevOps:

- CRM/Salesforce integrations
- Planning and what-if-scenarios
- Budget vs. actuals
- Automated revenue recognition
- 300+ billing scenarios
- Contracts management
- Project costing and billing for services
- Integrated real-time dynamic reporting
- Role-based dashboards
- Pre-built integrations and open API
- Third-party integrations

Where will you **grow** next?



Fast-growing SaaS companies choose Sage Intacct because our comprehensive features are tailored to support every stage of your business. We grow with you, improving day-to-day task efficiency while meeting high-level strategic goals.

Whether you're raising your next round of funding or going public, we'll help you through every stage of the maturity curve. We partner with forward-thinking CFOs who use real-time insights to drive profitable revenue growth and continue the quest for an IPO.

For CFOs seeking to catalyze growth at every stage, you'll find purpose-built tools, dedicated expertise, and unwavering support through Sage Intacct.

Take a product tour to learn how Sage Intacct can help you get that next funding round or go IPO.

sage.com
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