

Sage Intacct Accountants Program

Prospective Partner
Guide Preview



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Welcome to the Sage Intacct Accountants Program Prospective Partner Guide Preview

Thank you for your interest in the Sage Intacct Accountants Program (SIAP).

Sage Intacct and CPA.com are committed to every firm's success and investing in the supporting resources to achieve that goal. It spans beyond providing the best technology and support available; we strive to be a true partner with every member of our program.

By working together, we can maximize our level of mutual success for all stakeholders. It must be a WIN-WIN-WIN-WIN — a win for your clients, your firm, Sage Intacct and CPA.com.

This guide is designed as an introduction to the Sage Intacct Accountants Program. It will help you with your early evaluation in determining whether it's a good fit for your firm. After you have finished reviewing this preview version, reach out to CPA.com via email (inquire@hq.cpa.com) or directly to your Enterprise Account Manager and ask to receive the full guide which contains more details on the program.

Thank you for your interest, and we look forward to the possibility of working together!

Sincerely,



Kevin Cumley
Senior Director of Sage Intacct
Accountants Program,
Sage Intacct



Kalil Merhib
VP of Sales, CPA.com

Becoming a Sage Intacct Accountants Program Partner

What is the Sage Intacct Accountants Program?

Today's progressive CPA firms are offering their business clients so much more than monthly financial statements and annual tax returns. With the advent of cloud technologies, firm leaders have elevated services from basic transactional work to high-value, full-scale outsourced accounting — serving as their clients' "internal" accounting department and significantly expanding their trusted adviser role. More and more accounting professionals are transforming their firms, expanding beyond traditional offerings to provide year-round, collaborative-based client accounting and financial advisory services.

To help firms take advantage of the growth opportunity in this area, CPA.com and Sage Intacct partnered to develop the Sage Intacct Accountants Program (SIAP). Through the SIAP, firms are leveraging the best-in-class accounting capabilities of Sage Intacct to deliver high-value engagements such as virtual **CFO-level** outsourced accounting services for their clients. Designed for accounting firms, the program offers access to an accountant console as well as a plethora of industry leading resources, tools, education and support.

Sage Intacct's innovative and award-winning applications are used by organizations from startups to public companies and are designed to improve company performance and make finance more productive. Sage Intacct can scale down for small businesses, but truly shines with mid-tier organizations.

About you

If your firm is progressive with an outsourcing practice that aims to provide high-value accounting and financial services to your clients with real-time collaboration, then the SIAP can help grow your practice and take it to the next level.

Firms of different sizes from Top 500 firms to smaller mid-sized CPAs, as well as Business Process Outsourcers (BPO) servicing clients with different needs have been successful in the program because of their sound strategy and drive to build out this area.

Program mission and goal

Before diving into this guide, it's important to understand the mission of the SIAP and the partnership between firms and the SIAP team.

The program was created with firm success as the single point of focus. One of our top priorities is to do everything possible to help ensure we are working together towards the same common goals, as it is critical for our shared success.

SIAP Mission Statement: To provide a comprehensive partner program that enables progressive firms to deliver high-value accounting and strategic advisory services that helps all stakeholders grow and succeed.

It's simple — if we work together, we can all win. It is an ongoing and evolving process that requires active participation and communication.

“Outsourced accounting used to make up about 5% of the business, and now it's at about 20% of firm revenue. Our objective is that outsourcing will be 50% of the business in the next 5–10 years. Being part of the Sage Intacct Accountants Program has certainly helped fuel this success.”

John G. Wooldridge, CPA
Principal, CliftonLarsonAllen



Core philosophy

One of our basic foundational values is to act with integrity and observe ethical standards. All decisions should be in the best interest of customers. Partner success is determined by maintaining a high level of customer satisfaction and growth of the customer base.



Meet the team: CPA.com and Sage Intacct

The SIAP includes support from staff including CPA.com Enterprise Account Managers and SIAP Practice Development Managers who work closely with firm leaders to guide them toward success. This team of professionals includes CPAs and MBAs with vast industry experience.

The SIAP staff can serve as extended members of your firm's team. These seasoned professionals guide SIAP partners in identifying needed resources as well as offer support in developing a solid business plan. They sometimes even assist in managing and executing the plan to help ensure a successful outcome.

"Sage Intacct and CPA.com are constantly looking for ways to help partners grow and succeed and are fully committed to making it happen! We know this business, and we understand what it takes. The firms that are making the investment and commitment are knocking it out of the park," said Kevin Cumley, Senior Director – SIAP.

Sage Intacct channel organization

Sage Intacct has three channels that deliver solutions to customers: SIAP, VAR (Value Added Reseller Program) and direct sales. The SIAP is designed for firms providing outsourced accounting services for their clients, the VAR channel is for partners who resell Sage Intacct to organizations for internal use, and the direct sales team is for customers who want to work directly with Sage Intacct to purchase and deploy software internally.

Pricing

The SIAP offers the Sage Intacct platform at a preferred price to SIAP partners who provide the following services to their clients:

- Outsourced virtual CFO and/or controllership services
- Outsourced accounting services including real-time transaction processing (Transaction processing can be performed by the practitioner firm, or a combination of the firm and client)

This program and associated client pricing is not designed to offer client access to Sage Intacct without providing outsourced services, or for firms to use only for their internal books.

Program benefits

We enable our partners' success every step of the way, and we work together to truly excel – both as solution providers for our customers, and as profitable businesses. As an SIAP partner, you'll receive a wealth of benefits in support of these ideals. In addition, your firm will have free use of Sage Intacct for your firm's books.

While product education is an important part of the program, the initial focus starts with partner enablement before diving into product training.



Getting engaged and onboard

We have developed a step-by-step approach to ensure every partner goes through a standardized and comprehensive enablement process and has the knowledge to develop a successful SIAP practice. This is required for all firms to complete before they begin onboarding clients, and is not optional.

Our end-to-end enablement approach is designed to cover every key area where your firm needs to focus during the first year as a SIAP partner, helping to build a strong foundation for success in the program. This includes strategic sessions to establish related systems and processes, and implementation assistance to help you successfully deliver your initial SIAP CAS engagements. Additionally, your marketing and sales teams will have access to numerous resources that will support their contributions to your practice growth strategy.

Education and certification

Sage Intacct and CPA.com make a substantial investment in our partners to ensure they have the proper education and training to not only become proficient in using the platform, but also to strengthen their practice and strategy. As part of the program, partners have access to numerous resources designed to increase their knowledge and propel the growth of their services.

Here are some of the training and support included in the SIAP:

- Product certification
- Partner sales training
- Sales engineering assistance
- Partner services implementation assistance
- Marketing resources
- Sage Intacct community

“Having the SIAP team lead us through the enablement process was an exceptional experience. They not only provided valuable tools and resources, but also instilled confidence to ensure a successful launch of our CAS practice.”

Tommye E. Barie, CPA

Former chair, AICPA Board of Directors

Additional learning opportunities

We are seeing a growing trend in the SIAP as our partners become increasingly more “professionalized” with client accounting services, setting their firms apart from others that offer accounting support such as entry-level bookkeeping (often using less sophisticated technology). A complement to SIAP education, the Client Accounting Advisory Certificate offered by CPA.com allows firms to obtain a digital badge to demonstrate their expertise. The foundation of this curriculum is the Client Advisory Services Roadmap Workshop, a 15 CPE credit course offered in person or virtually, created to help practitioners build a high-performing outsourced accounting and advisory practice.

In addition, various events offered by Sage Intacct and CPA.com can help SIAP firms strengthen areas such as staffing, leadership skills and more. Premier events that are very beneficial for SIAP partners include Sage Intacct Advantage and The Digital CPA Conference.

Connecting the channels in a collaborative manner will increase the success of partners and Sage Intacct!



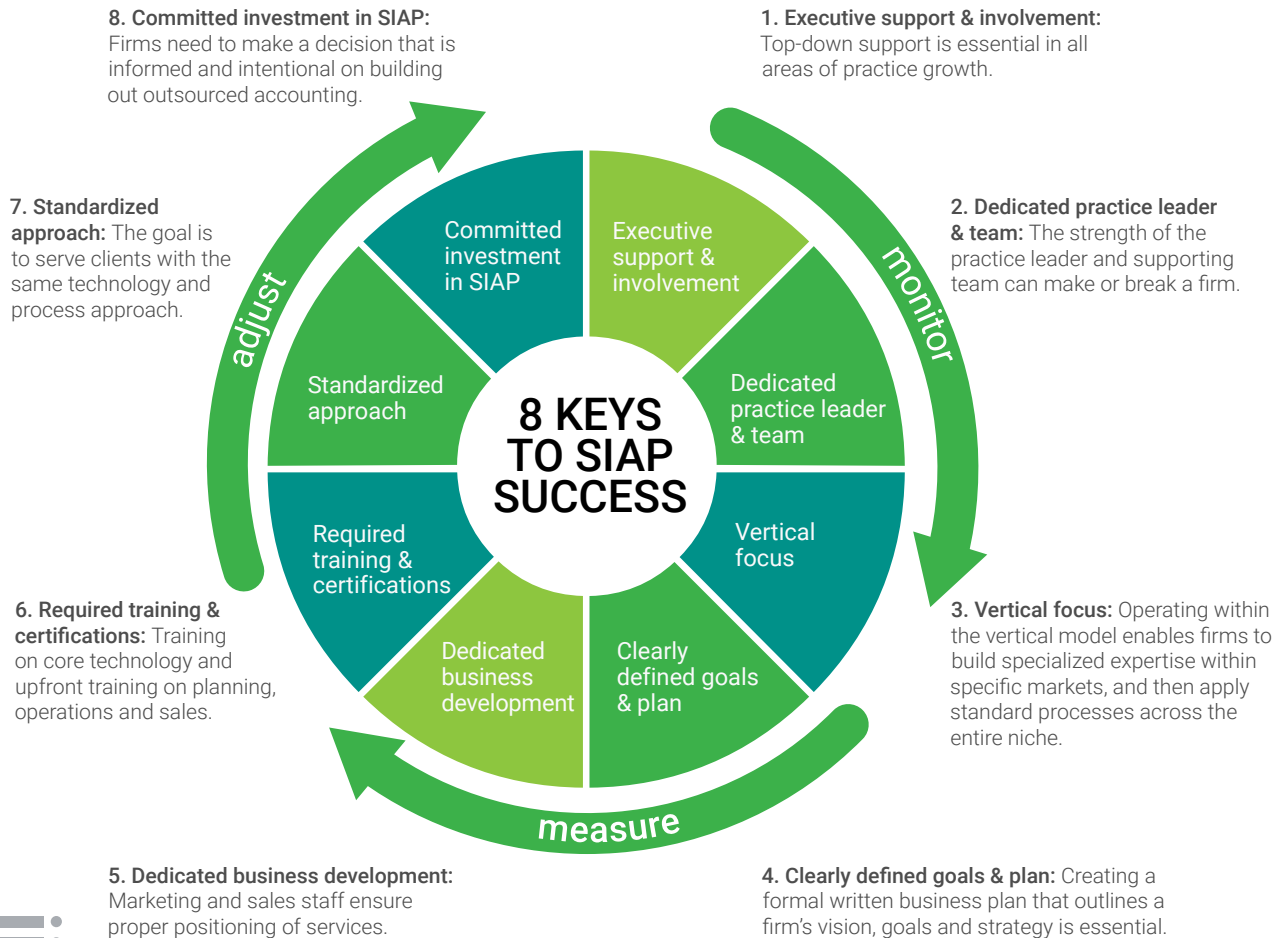
Program benefits: 8 keys to success

With the dedicated goal of designing an approach to help firms achieve maximum success in the realm of outsourced accounting, the SIAP team looked at top performers to learn what makes them perform so much better than their peers. Through detailed conversations with firm leaders, commonalities in practice were identified and eight Keys to Success in the SIAP were developed. A comprehensive guide, available exclusively to SIAP partners, provides details on each of the eight keys. The following offers a preview of the 8 keys.

While it's important to be strong in all these areas, a firm must enter the SIAP with both executive support as well as a great practice leader and team. The rest of the eight keys can be developed over time and SIAP staff will guide our partners as they work on these areas.

“The 8 keys to success helped us identify the areas of our practice that were essential for us to focus on as we were building out our strategy. It’s a fantastic tool that has allowed us to learn from the experiences of other firms who have been through this journey and had great success.”

Paula Saidy, CPA



Partner requirements and guidelines

The SIAP requires the desire and strong commitment to grow the outsourced accounting practice and deliver high-value services for your clients. **Firms need to make a decision that is informed and intentional that they are fully committed to building a successful SIAP practice.** To support that decision, a commitment of time and resources is essential. Participation in the SIAP involves working in partnership with the SIAP team, including staff from both Sage Intacct and CPA.com. Partners are expected to maintain an open and collaborative relationship with the SIAP team members who are here to support your firm and the growth of your practice.

Firms need to determine the “why” in their efforts. They must also determine the who, what, where and when required—and, ultimately, “how” they will make it all happen. This program is intended for firms committed to dedicating the proper resources and time, and have the drive to achieve success.

“The SIAP team has been wonderful in guiding us, sharing best practices and helping us build our Sage Intacct knowledge. The SIAP team genuinely cares about our success – that’s what a great partnership is all about. I’m confident we have made the right choice in partnering with Sage Intacct.”

Brian Stueve, CPA/CITP
Certified Information Systems Auditor
Olsen Thielen

Next steps and resources

Evaluating the Sage Intacct Accountants Program

Prospective partners are encouraged to fully explore this opportunity before making a decision. Firms that truly understand what the program involves and what’s required are better positioned for a successful start. Here are some ways you can evaluate the SIAP:

- > Speak to a CPA.com Enterprise Account Manager to receive access to the full Prospective Partner Guide to help gain a deeper understanding of what it takes to succeed as an SIAP partner.
- > Attend various workshops offered by CPA.com to hear how other partners have built their outsourcing practice and develop a plan for your own.
- > Gain an in-depth understanding of the Sage Intacct platform to ensure it’s the right solution for your firm to build a successful outsourcing practice. In conducting a thorough evaluation, consider whether it will suit the needs of your clients.
- > Speak with other SIAP partners about their experience with the program.

Not ready for the Sage Intacct Accountants Program yet?

While you may be eager to begin your journey with Sage Intacct, it’s important to understand the requirements and commitment outlined in this guide. If your firm isn’t ready at this stage, we recommend you focus on your internal structure and strategy.

Whether your firm already has a client accounting services practice, or is just getting it off the ground, a good place to start is the CPA.com Client Advisory Services Roadmap Workshop that we mentioned in the benefits section of this guide.

We also recommend you look at the Eight Keys to Success outlined in this guide and identify the areas that may need improvement.

When you are ready, we would love to help you be successful in the SIAP.



Next steps and resources

Resource links

[CPA.com/sageintacct](https://cpa.com/sageintacct)

[Sage Intacct for Accounting Firms](#)

[Sage Intacct Advantage Conference](#)

[Digital CPA Conference](#)

[CPA.com Digital Client Advisory Services Roadmap Workshop](#)

[CPA.com Client Accounting Advisory Services Certificate](#)

[Sage Intacct Marketplace](#)

To learn more, contact us at inquire@hq.cpa.com or call 855-855-5CPA.

“In some regards, we were always in this business performing this type of work; it just wasn’t within a formalized process. We attended a CPA.com workshop to get guidance on structuring our outsourced accounting practice, creating job descriptions and developing a pricing model. Sage Intacct is at the core of this road map, so we engaged with Sage Intacct shortly after the workshop.”

Paul Gerry
Gray, Gray, & Gray LLP

About CPA.com

CPA.com brings innovative solutions to the accounting profession, either in partnership with leading providers or directly through its development. The company has established itself as a thought leader on emerging technologies and as the trusted business adviser to practitioners in the United States, with a growing global focus.

Our company’s core mission is to drive the transformation of practice areas, advance the technology ecosystem for the profession and lead technology research and innovation efforts for practitioners.

A subsidiary of the American Institute of CPAs, the company is also part of the Association of International Certified Professional Accountants, the world’s most influential organization representing the profession. For more information, visit [CPA.com](https://cpa.com).

About Sage Intacct

Sage Intacct is the innovation and customer satisfaction leader in cloud Financial Management. With the powerful combination of Sage and Intacct, the Sage Business Cloud offers the best capabilities of both companies. Bringing cloud computing to finance and accounting, Sage Intacct’s innovative and award-winning applications are the preferred financial applications for AICPA business solutions. In use by organizations from startups to public companies, Sage Intacct is designed to improve company performance and make finance more productive. Hundreds of leading CPA firms and value-added resellers also offer Intacct to their clients.

Visit sageintacct.com/accounting-software-products for detailed information about our award winning and industry-leading solution.