

Success Story

Staffing agency grows margin by 11%, eliminates dozens of hours of manual work

TrainingPros

“The difference with Sage Intacct is that now we’re in front of the eight ball, instead of always being behind it. We’re able to provide real-time information to management, invoice our customers more quickly, and pay our contractors more accurately.”

Jill Vogin

CFO, TrainingPros

Company overview

Founded in 1997, TrainingPros — a highly specialized staffing company with a large and active pool of expert consultants — focuses on serving clients’ learning and development project needs.

Executive summary

Previous software:

- QuickBooks

Results with Sage Intacct

- Payroll runs reduced from a week to three hours.
- Complex commissions management cut from days to hours.
- 11% growth in margin with Sage Intacct dashboards.
- Improved cash management and visibility amid double-digit growth.



Sage

Company
TrainingPros

Location
Georgia, US

Industry
Professional Services

Sage Products
Sage Intacct

training
pros



TrainingPros seeks scale, agility amid double-digit growth

Founded in 1997, TrainingPros is a specialized staffing agency focused on meeting client needs for learning and development. The Atlanta-based company provides companies nationwide with contractors skilled in areas such as instructional design, training coordination, technical communications, and copywriting to help clients effectively train internal staff. Fortune 1000 businesses such as The Home Depot, The Kraft Heinz Company, and Newell Rubbermaid rely on TrainingPros to boost learning and development, and ultimately business performance.

As TrainingPros grew — its revenue more than doubled between 2012-19 — so did its need for robust financial management that could handle increasing complexity and deliver needed visibility. A desktop QuickBooks system allowed just two concurrent users, while TrainingPros tried to manage complex commissions for its sales staff in a “monster” spreadsheet prone to broken formulas. “We had a hodgepodge of products that was very clunky and cumbersome, with no realtime sharing of valuable data at all,” said CFO Jill Vogin, who joined TrainingPros in 2012. “It was a patchwork of systems that, if something went down, was a maintenance nightmare,” Jill said.

With the forward-thinking Jill spearheading a move to modern cloud accounting, TrainingPros selected Sage Intacct as the ideal platform for its next phase of growth. One factor was that Sage Intacct is the preferred financial management solution of the American Institute of Certified Public Accountants (AICPA). Plus, Sage Intacct was well suited for mid-market companies with a cloud model that supported TrainingPros’ virtual business in which permanent staff and consultants work remotely. “Sage Intacct has the user-friendliness, the customization ability, and the strong support I was looking for,” Jill said. TrainingPros would put Sage Intacct’s customizability to good use during its 2016 deployment and beyond.



TrainingPros added custom fields and custom reports to Sage Intacct to calculate, manage, and pay complex commissions for sales personnel.

Customization pays off with dozens of hours of time savings

With implementation by Sage Intacct partner Massey Consulting (since merged with Dean Dorton), TrainingPros got a jumpstart on making the most of Sage Intacct. Jill made clear to Massey that she wanted more than just an implementation — she was looking to gain hands-on skills and knowledge that she could use to customize Sage Intacct to the firm’s needs. “Massey showed me all the things we could do with custom fields and dashboards in Sage Intacct, and we’ve been using those capabilities like crazy,” Jill said. “The entire Massey team was very responsive to my concerns of both budget and timeline,” Jill shared. That’s paying off with innovative customizations that have eliminated dozens of hours of manual Excel work while improving business visibility across the board.

In one customization, TrainingPros contractors enter hours directly into the Sage Intacct timesheets module. From there, TrainingPros can both bill clients and pay contractors, who can number up to 250 on client assignments at any given time. Through customization, time sheets, accounts payable, and vendor payments all link to Sage Intacct to automate what had been a difficult and time-consuming manual task involving individual invoices. “I can push out payroll in a couple of hours if there’s not a major problem, instead of a week like I used to,” Jill said. “We’ve been very creative with our use of Sage Intacct, and for a relatively small company, it’s been a huge cost savings,” Jill added.

In another innovation, TrainingPros added custom fields and custom reports to Sage Intacct to calculate, manage, and pay complex commissions for sales personnel. That replaced a manual process by which data was downloaded from QuickBooks to calculate commissions in Excel. Time spent on commissions management dropped from several days to a few hours a month, while accuracy improved through verification checks and exception management. Plus, TrainingPros introduced a bonus program and a variable commission model that more fairly balanced compensation based on revenue vs. margin.



Account manager dashboards contribute to 11% margin growth

Moreover, TrainingPros is providing each account manager with a personalized Sage Intacct dashboard for visibility into bonuses and commissions, not possible in the QuickBooksExcel days. Along with more generous compensation, that visibility serves to incent account managers and helped trigger an 11% growth in margin between 2016-19. “Account Managers can go to their dashboards and see how far away they are from the next bonus, how commissions compare over time, and look at their outstanding invoices,” Jill said. “It’s 100 times better than it was, with a whole bunch of data they didn’t have before,” Jill stated.

But Sage Intacct dashboards aren’t just for account managers — TrainingPros has made them available to about 225 users, from independent contractors right up to the company president. The president, a 13-year TrainingPros veteran who assumed her new role in 2020, uses a personalized dashboard showing cash balances updated daily, along with P&L statements and key metrics. “She can go in any time of the day or night and, in real time, see where we are with cash and the financial metrics that she’s interested in,” Jill said. “We were able to build that dashboard very quickly — we didn’t need a team of consultants to come in and reprogram everything from what the previous president wanted to what the new president wants. That’s huge, being able to be that nimble,” Jill remarked.

Daily cash management reports are proving especially valuable, as TrainingPros needs liquidity to fill the gap between when it pays contractors vs. when payments are received from clients. Payment timeliness is increasing as TrainingPros makes use of the Sage Intacct Collaborate feature to prompt collections follow-up by staff. Plus, the firm has deeper insights to support data-driven pricing decisions. Across-the-board access to information in Sage Intacct has proven a defining characteristic in TrainingPros’ success. “We said at the beginning, ‘Hey everybody, you have a dashboard in Sage Intacct — everything you need is at your fingertips,’” Jill shared. “That’s the model we’re working with today to the best of our ability,” Jill said.

