Success Story

Smart metrics, lean team, big results

Sage SaaS Intelligence powers reporting, renewals, and growth at Technical Toolboxes

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Doug Shattuck
CFO, Technical Toolboxes

The challenge

Technical Toolboxes needed accurate, real-time visibility into key metrics like ARR, revenue retention, and contract renewals. But with just three people on the finance team and a complex, high-volume contract model, tracking those numbers in Excel had become unsustainable.

The solution

Technical Toolboxes implemented Sage Intacct alongside Sage Intacct SaaS Intelligence to automate reporting, improve accuracy, and gain actionable insight into their SaaS business. The system provides real-time ARR, cohort analysis, renewal visibility and more at the click of a button.

Results with Sage Intacct & Sage SaaS Intelligence

The shift to automated, trusted SaaS metrics has delivered measurable value across finance, audit, and operations.

- ARR reporting time reduced from 16 hours to under 20 minutes.
- Recovered missed billings that paid for the system in year one.
- Doubled company size with no increase in finance headcount.
- Fastest audit in company history with zero adjustments or issues.
- Improved forecasting and collaboration with sales and executive teams.

Organization
Technical Toolboxes

Location
Texas, US

Industry
SaaS

Sage Products
Sage Intacct
Sage SaaS Intelligence

About Technical Toolboxes
Technical Toolboxes' modern software platform provides a simple way to get the most accurate pipeline engineering calculations that increase team productivity and improve compliance while decreasing risk.

About Baker Tilly
Baker Tilly is a leading advisory CPA firm that helps organizations modernize operations, improve financial visibility, and drive growth by leveraging their deep industry expertise and practical solutions.

Precision tools for high-stakes work

Technical Toolboxes is a lean team delivering powerful results. Headquartered in Houston, the company develops specialized engineering software that helps pipeline operators manage risk, meet regulatory requirements, and operate critical energy infrastructure safely. Its cloud-based platform—used by 19 of North America's 20 largest pipeline operators—supports complex engineering functions like corrosion analysis, weld integrity, hydraulic modeling, and AC mitigation.

This is high-stakes work. Every calculation has consequences for project timelines, budgets, safety, and the environment. As the company grows and adds new clients and capabilities, its finance team needs to match that complexity with clarity.

Technical Toolboxes is growing at double-digits annually, yet its finance team is just three people strong. Tracking recurring revenue, contract value, and customer retention at scale requires more than spreadsheets—it demands real-time visibility into SaaS metrics that decision-makers can trust.

"We've doubled the size of the business without growing the accounting team," says Doug Shattuck, Chief Financial Officer. "That's only possible because of the automation and visibility we've gained with Sage Intacct and Sage SaaS Intelligence."

A smarter way to manage recurring revenue

Technical Toolboxes offers a range of product modules through a SaaS subscription model. Like most growing software companies, they need to monitor recurring revenue, customer retention, and contract value across multiple products and customer types. And like many CFOs, Doug had grown tired of wrangling spreadsheets just to produce core SaaS metrics.

"Our first attempt at calculating Annual Recurring Revenue (ARR) was a challenge," Doug recalls. "We were pulling data from five different sources. You'd make a small change and it would break the whole model. We were spending hours maintaining spreadsheets instead of analyzing the business."

With Sage SaaS Intelligence, those metrics are calculated automatically from real-time financial and contract data. Metrics like ARR, churn, renewal rates, and net retention are available on demand—without the manual reconciliation.

"We now get SaaS metrics directly from our accounting system," Doug says. "It's fast, it's clean, and we can trust the numbers."

With Sage SaaS Intelligence, Technical Toolboxes' finance team spends less time chasing data and more time driving strategy.

Instant insight, board-ready reporting

Before moving to Sage Intacct and Sage SaaS Intelligence, preparing board reports took hours each month. Today, Doug can pull critical SaaS KPIs like Net Revenue Retention, Average Contract Value, and expansion revenue with a few clicks. The metrics are faster to obtain and deliver greater consistency and credibility.

That visibility also supports better decision-making. With Sage SaaS Intelligence, Technical Toolboxes can segment metrics by customer cohort, product line, and time period—allowing Doug to drill into performance trends and understand what's driving growth.

"I can slice the data however I need to," he says. "We can see where we're growing, where we're losing, and what's really driving net revenue retention."

Big results from a lean team

For a finance team of three, the time savings are significant. Doug estimates they've reclaimed at least 10–12 hours a month on reporting alone. He no longer needs to spend hours validating spreadsheet formulas or explaining manual calculations to stakeholders. "Our controller used to spend so much time just making reports work," he says. "Now she can focus on the story behind the numbers."

The benefits go beyond finance. The customer success team now uses SaaS Intelligence metrics to track churn risk and renewal trends, while sales and marketing leaders use it to evaluate upsell performance. "We're still a relatively small company," Doug says, "but the tools help us perform like a larger entity. We're operating with more confidence and more maturity."

During the initial implementation of Sage Intacct, Doug and his team uncovered something surprising: several active customer contracts had never been invoiced under their previous manual processes. "We'd allowed them to use the software, but the invoices had slipped through the cracks," Doug says.

The company effectively paid for its first year of Sage Intacct and Sage SaaS Intelligence by identifying and correcting those missed billings.

Ready for what's next

With Sage Intacct and Sage SaaS Intelligence, Technical Toolboxes has a foundation that supports future growth. The company continues to expand its product offerings and serve new verticals—without worrying about outgrowing its systems.

"We're able to scale without adding headcount, which is a big deal," Doug says. "We can see what's happening across the business in real-time, which gives us the confidence to move faster."

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Faster audits, stronger confidence
Doug also appreciates the system’s reliability—especially as audit season approaches. In fact, the first full audit the company completed after implementing Sage Intacct and Sage SaaS Intelligence was the smoothest they’d ever experienced. “Our auditors had nothing to report—no adjustments, no issues, no exceptions,” Doug says. “It was the fastest and cleanest audit we’ve ever had.”

That success, he adds, speaks to the confidence that comes from having clean, well-documented, system-generated data. “I love knowing that if our auditors ask how we calculate revenue, I can show them the report straight from the system,” Doug says. “There’s no Excel magic going on. It’s defensible, neat, accurate, and consistent.”

As Technical Toolboxes continues to grow, Sage Intacct and Sage SaaS Intelligence equip the finance team with the clarity and confidence to move faster, scale smarter, and support the business every step of the way.