

## Success Story

# Leverage Technologies takes their own advice

“Moving to the cloud has provided instant access to system upgrades, ensuring we are always using the latest innovations for automation, usability and analytics.”

**Natalie Griffin**

CFO, Leverage Technologies



### Leverage Technologies implements Sage Intacct

For more than 20 years, Leverage Technologies has been helping organisations with digital transformation initiatives that drive operational excellence. Leverage Technologies provides expert advice and Cloud ERP technology solutions that empower businesses to streamline operations, enhance financial visibility and scale efficiently.

Having recommended and implemented Sage Intacct for many of their clients, it was the obvious choice when the time came for Leverage Technologies to transform their own operations and financial management. A successful implementation of Intacct ensures Leverage Technologies can scale their business efficiently to provide outstanding technology solutions and support to a growing number of clients.

### Results with Sage Intacct

- Access to real-time reporting on customer and project profitability
- Single source access and improved visibility of project and contract financial information
- Month-end close and advanced reporting can now be completed in just four days
- Management team has daily access to important KPIs by division and project
- 60% reduction in cloud and recurring income invoice processing time
- Time saved on administrative tasks enables finance team to be deployed to higher value, strategic tasks
- Business can now scale more efficiently without adding net new headcount

The Sage logo, consisting of the word "Sage" in a bold, sans-serif font.

#### Company

Leverage Technologies

#### Location

Australia

#### Industry

Business Services & Technology

#### Sage Products

Sage Intacct

#### Partner

Leverage Technologies



#### About Leverage Technologies

Leverage Technologies is a leading ERP software partner founded in 2005. Now one of the largest Sage partners in the southern hemisphere, they deliver tailored ERP solutions to small-to-medium businesses and global enterprises. Their services include consulting, implementation, training, and ongoing support across a range of vendor solutions.



### **Taking a look in the mirror**

The team at Leverage Technologies is focused on advising clients on which ERP system will best suit their needs now and into the future, then helping them implement new solutions while providing ongoing training and support. Over the years, they've done this for more than 400 clients right across Australia.

Stepping back from their day-to-day work helping clients, the operations and finance leaders at Leverage Technologies realised they would benefit from their own digital transformation to make a range of operational improvements that would enable the business to scale efficiently.

### **Meeting the needs of a growing organisation**

Like many of the organisations they advise, Leverage Technologies had experienced significant growth, exposing the limitations of legacy systems that were no longer fit for purpose. Challenges included slow, manual reporting and a lack of timely information for decision-makers. They aimed to automate tasks, reduce errors through workflows, and speed up month-end reporting.

To meet current and future operational needs, Leverage Technologies required a cloud-based system to integrate client data and provide accurate, timely insights to finance, sales, and delivery teams.

# Sage

### **Taking their own advice**

Following the process that they undertake alongside clients during digital transformation initiatives, Leverage Technologies evaluated a number of cloud-based applications to adopt for their own business.

Sage Intacct provided the best fit for their needs, thanks in part to its comprehensive and strong capabilities in contract management, recurring income, project accounting and overall financial management. The decision was also influenced by Intacct's proven success in the services sector, customer advocacy and the reputation of Sage as an industry leader.

### **A well-planned implementation**

Leverage Technologies is in the business of technology consulting and implementations. With hundreds of these projects successfully delivered for clients, it's no surprise that implementing Sage Intacct for themselves was well-planned for a seamless transition.

Experts from the Leverage Technologies consultancy and project management teams established a clear set of priorities and mapped out an implementation plan based on business objectives, target go-live date and available resources. The key was treating their own project in exactly the same way as they do client projects.



### **A focus on accuracy**

The ability of the new system to provide more accurate information hinged on improved recording of consultant time during client projects. The implementation of Sage Intacct was focused on capturing project and consultant information in real-time for more timely and accurate client invoicing and management reporting. Data migration followed, with customers, suppliers, projects and contracts brought across from legacy systems to Sage Intacct. Intacct was largely implemented 'out-of-the-box', with some customised development for modules such as timesheet entry to make the transition easier for Leverage Technologies consultants.

### **Managing organisational change**

Leverage Technologies understands very well that successful digital transformation is as much about the people as it is about the technology. The experience gained doing hundreds of client projects helped them execute a comprehensive and effective change management program in parallel with the implementation of Sage Intacct.

User groups within Leverage Technologies including finance, consulting, AP/AR, projects and contracts were provided e-learning resources, recorded webinars and superuser training in a sandbox environment prior to User Acceptance Testing (UAT). Regular stakeholder meetings, live demos and a feedback loop throughout the entire project ensured nothing was left to chance.

Accurate information drives better business decisions  
Single source access to contract and project financial information, including recurring income, ensures general managers have real-time visibility of customer and project profitability to aid better decision-making.

For the finance team, month-end close and preparation of advanced financial reports is now available in as little as four days, and there has been a 60% reduction in cloud and recurring income invoice processing time. The Leverage Technologies finance team now spends far less time on administrative tasks, and instead can focus on more high value, strategic work and projects.

"The use of project import templates has reduced administrative entry time from 30 minutes to a matter of seconds for a complex project, improving efficiency by over 95% while significantly increasing data accuracy and eliminating manual data entry errors", said Helen Jenkinson, Project Administrator at Leverage Technologies.

### **Committed to continuous improvement**

On client projects, the work is not done when a new solution or system goes live. Instead, a process of review, iteration and improvement is ongoing to ensure the evolving needs of the organisation are met. It is no different for their own digital transformation project. Since the implementation of Sage Intacct, there are a number of ongoing projects to enhance the system for Leverage Technologies, including custom reports and dashboards to enable deeper data analysis. They are also trialling accounts payable automation and additional non-financial reporting such as consultant on-site days and customer satisfaction.



“The general feedback from consultants is that Sage Intacct has improved the efficiency and accuracy of timesheet entry, and that there is improved reporting on project performance.”

**Pamela Bratley**

Lead Senior Consultant, Leverage Technologies

**Practicing what they preach**

Leverage Technologies is a highly awarded provider of ERP advice, implementation and support. For over 20 years, they've helped Australian businesses leverage technology to achieve better outcomes. Experts in consulting, implementation, integrations and support, Leverage Technologies specialises in delivering cloud-first ERP deployments. When undertaking their own digital transformation, they approached it as they do for clients – strategically, with clear business objectives and detailed planning. The successful implementation of Sage Intacct reflects the deep expertise of their consultants, project managers and finance professionals.

As a Sage Platinum Partner, Leverage Technologies is recognised for building scalable solutions that streamline processes, cut costs, improve cash flow, and support growth. Privately-owned and Australian-based, the team brings industry-specific knowledge, technical excellence, and a strong commitment to building long-lasting relationships to every engagement. “Having completed many successful implementations of Sage Intacct for our clients, when it was time for us to adopt the system, we knew exactly what to do. We managed our own project as we do all client projects – with an unwavering focus on efficient and effective implementation of the latest technology to deliver better business outcomes”, said Pierre Fourie, Sage General Manager at Leverage Technologies.



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