

Success Story

Building a broader finance practice for growth

Sage Intacct Advisory helps Chazin deliver full-service nonprofit accounting at scale, from day-to-day accounting through CFO-level guidance

“We give our clients the space to worry less about their finances and more about their mission.”

Michelle Jilek, CPA

Vice President, Onboarding and Innovation, Chazin



The challenge

Outsourced accounting firms scale the way most service businesses do: by adding people. That model caps growth and makes it hard to build the specialized expertise that complex nonprofit reporting demands.



The solution

As a Sage Intacct Advisory partner, Chazin runs and maintains a discrete Sage Intacct environment for each client, priced more competitively than another reseller could offer, which lets the firm take on the full accounting operation for organizations that would otherwise staff it internally, with CFO advisory capacity built on the same expertise.



Results with Sage Intacct Advisory

A decade in, the partnership has changed what Chazin can offer clients and what kind of firm it's become.

- A dedicated CFO advisory practice added in the last two years.
- Six team members trained in Sage Intacct implementation.
- Increased win rate by tailoring proposals and offering streamlined onboarding.
- Chazin runs its own billing, capacity planning, and performance dashboards on Sage Intacct too.
- Clients on Sage Intacct span the full service range, from single-entity organizations to multi-entity international nonprofits.



Organization
Chazin

Location
Remote (U.S. nationwide)

Industry
Accounting

Sage Products & Program
Sage Intacct
Sage Intacct Advisory



About Chazin

Chazin provides outsourced accounting, CFO services, technology, and training to nonprofits nationwide. For more than 20 years, the firm has worked exclusively in the sector, building its model around how nonprofits actually operate. Chazin has been a Sage Intacct Advisory partner for a decade.

www.chazinandcompany.com



A firm built around nonprofit finance

Chazin began over 20 years ago as an LLC serving membership associations in the Washington, D.C., area. As demand for outsourced nonprofit accounting grew, so did the firm. Today, Chazin provides accounting, consulting, and CFO advisory services to nonprofit organizations nationwide.

Michelle Jilek, CPA, Vice President, Onboarding and Innovation, says the firm's specialization attracts employees who care deeply about the organizations they serve and that shows up in the work. "We give our clients the space to worry less about their finances and more about their mission," she says.

The mission comes with real complexity. Nonprofits must comply with GAAP while tracking grants, donor restrictions, programs, departments, and funding sources. They need strong controls and audit-ready records, but they also need information their executive teams and boards can use to make decisions.

Chazin began working with Sage Intacct a decade ago as its client base expanded to include larger, multi-entity nonprofits with increasingly complex reporting requirements. The relationship has since helped Chazin develop a scalable service model, broaden its expertise, and expand what the firm delivers: outsourced accounting, CFO services, technology, and training, all on the same foundation.

Creating room for advisory work

Outsourced accounting firms often add capacity by hiring more people. Chazin wanted to serve larger and more complex organizations without tying every increment of growth to another increment of headcount.

Through Sage Intacct Advisory, Chazin provides each client with its own Sage Intacct environment, configured around the organization's structure and reporting needs. Chazin implements and maintains the system, manages changes as programs and requirements evolve, and builds the reports and dashboards clients use every day.

Some clients retain internal finance support, while others rely on Chazin for nearly the entire accounting function. Executive directors, CEOs, department leaders, and board treasurers can log in to see the information most relevant to them, including cash balances and burn rate, program performance, and grant activity.

Clients gain the reporting, controls, and ongoing financial support they need without having to build and maintain those capabilities entirely in-house.



With Sage Intacct Advisory, Chazin's team spends less time on transactional accounting and more time helping nonprofit leaders plan for what's next.

Sage Intacct also allows Chazin to deliver dynamic reporting without what Michelle calls “arts and crafts in Excel.” Instead of repeatedly cutting, pasting, and rebuilding reports each month, Chazin develops dashboards focused on the questions each organization needs answers to. Leaders can access updated information instantly without waiting for the finance team to compile and send another spreadsheet or PDF.

A leaner model with stronger capabilities

One international nonprofit offers a striking example of what Chazin's model makes possible.

The organization came to Chazin with a legacy accounting system that left it without timely reporting or a unified way to manage multiple entities and currencies. Chazin implemented a multi-entity, multi-currency Sage Intacct environment and redesigned the workflows around it.

Today, Chazin provides the accounting capacity and CFO-level support that the nonprofit previously managed through a five-person U.S. finance department. The work represents a little over one full-time Chazin role, while a corporate accountant in Europe continues to provide local knowledge and oversight. Integrated AP and AR workflows reduce manual effort, while the new financial structure gives leaders a clearer view across the organization.

Each international entity can view its financials in its own currency. Leadership can monitor exchange gains and losses, consolidate results across countries, and access timely information without maintaining separate sets of books. “We set up a multi-entity, multi-currency environment they hadn't had before,” Michelle says. “They could not be happier.”

The transformation gives the nonprofit a sophisticated international finance operation without the cost and management demands of maintaining a large internal team. Chazin provides the accounting capacity, system expertise, and CFO-level support. At the same time, the organization's leaders gain more time and better information to direct toward their mission.

From reports to guidance

Reporting is usually the first benefit Chazin clients notice. Some want to build and explore reports themselves. Others prefer to tell Chazin what they need to see and have the firm create it for them. Either way, each dashboard is shaped around the organization's priorities rather than forcing every client into the same reporting package.

Chazin has also developed deep expertise in using Sage Intacct dimensions for nonprofit accounting. The department dimension helps organize information for the statement of functional expenses, with minimal work beyond allocations. The project dimension can group federal grants by Assistance Listing Number and state grants by department. Class helps organize net assets.



“It helps us attract and retain talent. We’re attracting more complex clients, and we have people who want to work at a higher level.”

Michelle Jilek, CPA

Vice President, Onboarding and Innovation
Chazin

The structure gives Chazin the granularity required for nonprofit reporting without recreating the analysis manually each month. Audit support becomes easier, grant reporting becomes more precise, and leaders can examine finances by program, department, entity, funding source, or other relevant dimensions.

As Chazin’s command of Sage Intacct has grown, so has the range of organizations the firm can serve and the role it plays with each of them. That capability has also supported dedicated CFO advisory services added during the past two years, delivered by professionals trained in Sage Intacct reporting, dashboards, and connected marketplace solutions.

Those professionals can spend less time entering transactions and more time helping nonprofit leaders understand cash needs, assess program performance, plan for new funding, and prepare for what comes next.

Building the firm from the inside

Chazin also uses Sage Intacct to run its own business. The firm uses the platform for billing and has created dashboards that help internal managers review invoices, monitor their teams’ time, and track the performance measures for which they are accountable. Executive leaders have their own dashboards, while statistical accounts help Chazin monitor headcount, turnover, capacity planning, and hours sold.



Sage Intacct Advisory gives Chazin's professionals more capacity to apply their expertise where clients need it most.

The investment in Sage Intacct also supports Chazin's people. New employees go through initial training, and six team members have received implementation training. Employees attend Sage events to deepen their product knowledge and learn about new capabilities.

"It helps us attract and retain talent," Michelle says. Chazin is winning more complex work, and its employees get opportunities to "work at a higher level" rather than spending their days entering AP invoices or copying journal entries between entities.

A repeatable path to growth

Chazin has turned what it has learned into a disciplined approach for identifying and developing new opportunities.

Client services managers meet with clients at least quarterly. When an organization receives a new grant, launches a program, adds an entity, or begins to outgrow its current reporting capabilities, the manager can start a conversation about Sage Intacct. "We know the clients," Michelle says. "We plant that seed early on."

Chazin also creates tailored demonstrations using a prospect's own financial data. The idea came from a conversation Michelle had at the annual Sage Future conference. Chazin now uses a sandbox environment to show nonprofit leaders what their own reports and dashboards could look like in Sage Intacct. That instinct for building her own shortcut turned out to be ahead of its time. Sage has since built AI-powered onboarding tools directly into Sage Intacct, including industry-specific templates and automated data migration, aimed at exactly the kind of fast, tailored onboarding Chazin had already been doing.

The approach keeps the conversation focused on the outcome executives care about. They can see the information they would have available, how quickly they could access it, and how it could help them run the organization.

The customized demonstration requires relatively little preparation, but Michelle says it has significantly improved Chazin's win rate. When the firm recommends Sage Intacct to an existing client, those conversations typically turn into projects within the next 12 months.

Growth with a purpose

Chazin's growth still reflects the original priorities Adele Chazin established when she founded the firm: strong service, reliable controls, and a genuine commitment to nonprofit work.

The firm has grown exponentially over the past five years, yet its purpose remains familiar. Chazin helps nonprofit leaders focus on their missions while giving them confidence in the financial operation behind the work.

Sage Intacct has helped Chazin extend that promise to larger and more complex organizations. The firm can manage the accounting, strengthen reporting and controls, and provide the guidance leaders need to make decisions. At the same time, Chazin has created a more scalable business and more rewarding work for its own professionals.



Sage

 **CHAZIN**
EMPOWERING NONPROFITS FOR IMPACT

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