

## Success Story

# LA Insurance improves accounting efficiency 3x

The growing insurance broker revamped financial management to be faster, more insightful, and more cost-effective with Sage Intacct.

“We went from disorganization to an efficient finance function delivering highly valuable and accurate information.”

**David Salkowski**

Chief Financial Officer, LA Insurance



### The challenge

LA Insurance found its Microsoft Dynamics GP platform very difficult to use for accounting and reporting, forcing the accounting team to undertake labor-intensive manual data work and heavy spreadsheet usage for even routine functions as well as incurring significant 3rd party costs for systems assistance.



### The solution

Sage Intacct stood out as an ideal solution when CFO David Salkowski evaluated competing financial management platforms. It was selected over Oracle NetSuite for its ease of use, breadth of functionality, and affordability.



### The result

LA Insurance has transformed its financial management, generating groundbreaking insights to power data-driven decisions and refocusing its accounting staff from tedious manual work to value-add reporting and collections. The company has:

- Increased overall accounting efficiency 3x
- Reduced accounting team size 2x via attrition
- Cut monthly close time by 50%
- Reduced AP workloads by 60%
- Saved 30 hours a month in financial statement preparation
- Reduced audit costs 2x
- Improved staff job satisfaction and retention

Sage

**Company**  
LA Insurance

**Location**  
Michigan, US

**Industry**  
Insurance

**Sage Product**  
Sage Intacct

**L.A. insurance**

### About LA Insurance

Founded in 1992, LA Insurance serves customers with auto, motorcycle, and recreational coverage from more than 30 carriers, and has nearly 160 corporate and franchised stores across seven states.



“Microsoft Dynamics GP was a very difficult tool to use. It was virtually impossible to follow the flow of transactions through the system, and for us it’s critical to know what’s going on agency-by-agency so we can review performance.”

**David Salkowski**  
Chief Financial Officer

#### **An improvement in reporting**

LA Insurance was founded in 1992 and offers auto, motorcycle, and recreational vehicle insurance in Michigan, Arizona, Colorado, Florida, Georgia, Nevada, and Texas. When he joined the company as its CFO in 2020, David Salkowski immediately spotted opportunities to improve how financials were managed and analyzed, and how LA Insurance could simplify and accelerate its growth strategy.

LA Insurance, which is headquartered near Detroit, was struggling with extensive manual data work using Microsoft Dynamics GP and Excel. The monthly close dragged out for 40 days, and reporting limitations meant LA Insurance executives lacked insights for informed decision-making.

David began evaluating cloud financial management options. In his research, Sage Intacct stood out as an ideal solution for LA Insurance’s mid-market needs and objectives. The evaluation initially narrowed down the top choices to Sage Intacct and Oracle NetSuite.

“I felt Sage Intacct was more user friendly, had all the tools we needed, and the pricing was very competitive,” David says. “From that day forward, I’ve never looked back. I love the product.”



### **Dramatic gains in accounting efficiency**

David's satisfaction is shared by LA Insurance executives, who now have incisive insights to guide growth, while the accounting team members have been freed from manual work to focus on more strategic and value adding-tasks.

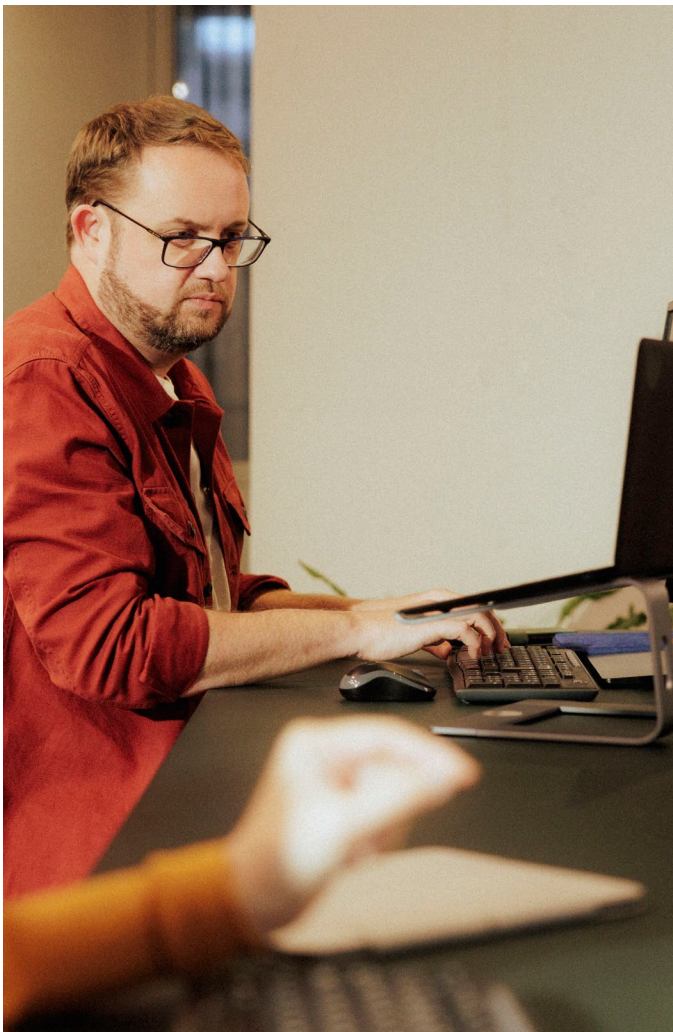
"Sage Intacct has transformed our accounting team from spending 100% of our time trying to close the books to spending time analyzing and contributing to business decisions," David says.

Efficiency and cost-effectiveness have soared with Sage Intacct. The size of the accounting team has been trimmed from 8 full-timers to just five by leaving vacated positions unfilled, saving more than \$180,000 a year. Despite the reduced headcount, LA Insurance has reduced its close time from 40 to 20 days, a 50% decrease.

In addition, time spent on accounts payables has dropped from 100 to 40 hours a week with streamlined workflows. The huge efficiency gains are giving staff back time to focus on value-adding activities such as collections, analysis, and reporting.

"We're doing more with fewer people," David notes.

"My accounting team is minimal and we're in a better position than we've ever been. Sage Intacct has changed our ability to work and what we get done."



With the time savings, LA Insurance has increased its speed and scope of reporting.

### **Greater speed and scope in reporting**

With the time savings, LA Insurance has increased its speed and scope of reporting. Balance sheets that had been done quarterly are now delivered monthly. Cash flow reporting, which was previously done sporadically, if at all, is now produced once a month. At the same time, LA Insurance has reduced time spent generating financial statements by 30 hours a month.

Robust slice-and-dice reporting using Sage Intacct dimensions, such as locations, is delivering breakthrough insights that guide data-driven decisions at LA Insurance.

Analyzing corporate store-by-store profitability in select regions revealed opportunities to merge stores in close proximity to others. The move had minimal impact on revenue and customer experiences as other stores were nearby, while substantially reducing annual fixed costs.

“Sage Intacct lets us run trailing 12-month trend analyses and ask, ‘How can we maximise results for this location?’” David says. “Those are decisions we can make now with very easy access to information that wasn’t possible before. We have totally changed the way executive management can manage the company.”

Sage Intacct reporting also helps inform decisions and measure ROI in acquiring new agencies, a key strategy in LA Insurance’s growth objectives. And when an acquisition is made, it’s easy to onboard the entity with Sage Intacct, often from QuickBooks.

“When we convert businesses from QuickBooks to Sage Intacct, it’s a 24-hour process—very simple and very easy,” David says.

### **‘100% confidence in the numbers’**

LA Insurance has also seen welcome improvement in its yearly external audits, which are faster and simpler for both the finance team and external auditors. As a result, David says audit costs have fallen about two-fold compared to their Microsoft Dynamics GP days.

The dramatic transformation in financial management has not gone unnoticed by LA Insurance owners and executives.

“I’ve heard tremendous feedback,” David says. “The reliability of financial data has totally changed. Management has 100% confidence in the numbers and can access store-by-store data to make decisions that weren’t being focused on before.”

And now, if ownership has a question for David, he’s able to answer it quickly, without the lengthy ordeal of gathering data and pasting it into Excel.

“If someone asks me how LA Insurance is performing, it takes me about a minute to run the question in Sage Intacct and provide an answer,” the CFO says. “That’s versus a two-day event of trying to pull information out of a system.”



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