



Sage Intacct Accountants Program

8 keys to success

Maximizing results from client advisory services.

Best practices of a successful practice

Modern leaders are elevating services from basic transactional work to high-value outsourced accounting and financial advisory services—serving as their clients’ “internal” accounting department and significantly expanding their role as a strategic advisor.

The Sage Intacct Accountants Program exists to help accounting practices take advantage of the growth opportunity in this area. This industry-leading program combines best-in-class financial management software with tools, training, and support specially designed to help practices achieve a successful client advisory services practice.

What does it take to have a thriving Sage Intacct Accountants Program practice? The 8 Keys to Success has the answer with best practices from our top-performing partners. There’s no better way to build your practice than learning directly from others who’ve been where you are.

Sage

The 8 keys to success



Monitor

Key 1: executive sponsor/support

Top-down support is essential in all areas of practice growth. Without executive support, the likelihood of successfully launching and maintaining outsourced accounting services is slim.

Key 2: great practice leader and team

The strength of the practice leader and supporting team can make or break a firm. Growing a client accounting services practice depends on these front line people.

Key 3: vertical focus

A vertical model enables firms to build specialized expertise, and then apply standard processes across the entire niche. This allows firms to share industry knowledge across teams—saving time and resources, while adding to the bottom line.

Measure

Key 4: clearly defined goals and plans

Planning is the foundation for successfully launching any new service. Creating a formal written business plan that outlines a firm's vision, goals, and strategy is essential.

Key 5: dedicated business development

It's vital to invest in business development, including both sales and marketing. Dedicated marketing and sales staff ensure proper positioning of services and prospect education.

Adjust

Key 6: level of education and training

To succeed right from the start, firms need up-front training for staff on core technology, planning, operations, and sales to support an outsourced accounting practice.

Key 7: standardized approach

Standardization is the gateway to unprecedented efficiency. The goal is to serve clients with the same technology and process approach.

Key 8: committed investment in SIAP

Investment in SIAP connects back to each of the other keys. Businesses need to make informed decisions on how to expand outsourced accounting services with Sage Intacct.

To learn more about the 8 Keys to Success and how the Sage Intacct Accountants Program can help your client advisory services practice thrive, visit us online at sage.com/us/siap.



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