



Guide

Sage Intacct for nonprofits: Our customer for life philosophy

Implementation and ongoing
support principles built for
customer success



Introduction

As a nonprofit finance leader, you understand the critical importance of partnerships in mission success. The right strategic technology partner can dramatically impact your ability to administer programs and prepare your organization for scalable growth. This is especially true when selecting a financial management solution.

According to **Gartner**, over 70% of Enterprise Resource Planning (ERP) software implementations fail to meet their objectives. Selecting a partner who can ensure reliable implementation success—not just provide attractive features—is crucial for your organization's future.

Sage Intacct has earned its position as the trusted choice for nonprofit organizations through:

- #1 in customer satisfaction in 3rd party reviews
- Thousands of successful nonprofit customers
- The first and only preferred provider of the AICPA
- Deep expertise across all nonprofit types and sizes

In this overview, we'll explain some of the principles that underpin our 'customer for life' mantra which have helped Sage become the #1 choice for Nonprofit financial management—because software is only as good as the people, processes, and organizational culture that help you get value from the technology.



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Preparing for your decision

The final stages of selecting a new financial management solution require careful consideration to ensure long-term success. This critical period provides an opportunity to validate your choice through three essential steps:

1

Core requirements review

While preliminary evaluations focus on broad feature sets, this final assessment should verify that the solution addresses your most critical needs.

Key areas to validate include:

- Multi-dimensional reporting capabilities
- Grant tracking and management tools
- Compliance and audit requirements
- Integration capabilities with existing systems
- Scalability for future growth

2

Peer organization validation

Look beyond initial reference calls to connect with nonprofits that have completed a full implementation cycle. Focus on organizations that have:

- Completed at least one renewal cycle and can speak to their vendor's behavior during the process
- Experienced significant growth post-implementation
- Similar mission focus and organizational complexity

3

Business case development

Build a compelling case grounded in concrete metrics drawn from peer experiences. Sage Intacct customers typically achieve:

- Less than **6-month** payback period
- Up to **50% faster** monthly close processes
- **40% faster** and more compliant audits
- Up to **75% more** time spent on strategy

This structured evaluation process helps ensure your organization selects more than just a software vendor—you gain a long-term partner committed to your mission success.



Our customer for life philosophy



“After comparing Sage Intacct with other products, our corporate and field teams all agreed that it was intuitive, dynamic, and flexible enough to capture all our operational complexities. What made the decision especially easy was the company’s ‘customer for life’ philosophy, which assured us that Sage Intacct could effectively carry us into the future.”

Stephen Vick

Accounting and Finance Manager, American Society
for Microbiology

Successful digital transformation requires more than powerful software—it demands the right implementation partner. Sage Intacct takes a dependable approach that centers on providing nonprofit organizations flexibility and proven expertise throughout their journey.

Customer-centric implementation

Every nonprofit’s needs, timeline, and resources differ. While Sage Intacct provides best practices developed through thousands of successful implementations, your organization maintains control over the pace and priorities. Whether choosing rapid deployment or a measured approach, the implementation path aligns with your specific requirements.

Quality service, your choice of path

Sage Intacct offers multiple implementation approaches through direct services or certified partners. Many organizations benefit from working with nationally recognized CPA firms who bring deep nonprofit accounting expertise along with technical knowledge. Regardless of path chosen, every implementation is delivered with rigorous standards of quality and support.

Streamlined and user-friendly

Adopting new financial management software represents significant change across an organization. Sage Intacct has a proven implementation framework that focuses on user adoption through:

- Intuitive interfaces that minimize training requirements
- Role-based configurations that show users only what they need
- Automated workflows that streamline common processes
- Clear documentation and embedded help resources

Proven and accountable

Sage Intacct stands behind its implementation quality with concrete guarantees:

- Clearly defined project scope and timeline commitments
- Data ownership and transition support if ever needed
- On-time and on-budget focus

This commitment to customer success has resulted in:

- Proven, quantifiable customer results
- Industry-leading retention rates
- Thousands of successful nonprofit implementations



The roadmap to success

A successful implementation follows a proven methodology developed through thousands of nonprofit deployments. Each phase builds toward ensuring your organization achieves rapid time-to-value while establishing a foundation for long-term success. While the approach may differ depending on your implementation partner, Sage methodology entails:



Define Phase

- Introductions & kickoff meeting
- Define and finalize project plan
- Define system foundations (e.g., dimension/data usage, business process reviews)
- Client begins attending any relevant education courses via Sage University

Configure Phase

- Conduct any additional business process reviews
- Walkthrough and configure the system for a business area or module (a walkthrough consists of Sage reviewing configuration settings, functionalities, and features to both educate client on system capabilities and finalize the configuration)
- Review, populate, and upload relevant data templates
- Test and signoff on configurations during which Sage provides as-requested assistance
- Repeat above steps for additional business areas and/or modules needed for go-live

System Readiness Phase

- Clear any test data
- Populate and upload any data templates for go-live (for example final master data, account balances, or open bills/invoices)
- System is now live and ready for use

Success Assurance Phase

- Use the production system while Sage provides post-live as-requested support (for example resolving usage issues, answering questions, etc.)
- Complete any post-live deliverables
- Review, populate, and upload any post-live data templates
- Transition to Customer Support and close the project

This structured approach, combined with the Sage Intacct team's expertise in nonprofit implementations, helps ensure your organization achieves maximum value from your investment while minimizing disruption to daily operations.

A detailed statement-of-work, written in plain English, will be reviewed with you. This document will outline the delivery approach and provide a description of how your implementation team will guide you through this transition.

A partnership for continuous growth

Selecting new financial management software represents just the beginning. Long-term success requires ongoing support, continuous learning, and a commitment to maximizing system value. Sage Intacct leverages a comprehensive support ecosystem that ensures your organization continues to thrive.

Customer success team

Your dedicated customer success team focuses on ensuring continuous value from your investment:

- Strategic guidance through quarterly business reviews
- Proactive monitoring of system utilization
- Priority case resolution and escalation management
- Regular check-ins to share product updates and best practices
- Communication of new features and capabilities

Continuous learning resources

Sage Intacct provides multiple paths for skill development and knowledge sharing:

Sage University

Access role-based training designed specifically for nonprofit finance teams:

- Self-paced learning paths
- Live virtual classes
- Certification programs
- Best practice workshops

Nonprofit resource hub

Stay current with insights tailored to nonprofit finance leaders:

- Industry trend analysis
- Regulatory compliance updates
- Peer case studies and success stories
- Best practice guides
- Implementation tips and tricks

Community engagement

Connect with peers and experts through multiple channels:

- Regional user groups for local networking
- Online community forums for knowledge sharing
- Annual Sage customer conference
- Special interest groups by nonprofit type
- Member masterclasses on advanced topics

Buy with confidence

Sage Intacct commitment to nonprofit success extends beyond software features to deliver high performance:

- **Product performance:** committed uptime of at least 99.8% or you can claim credits on your subscription
- **Data Security:** 24/7 continuous security monitoring and threat detection led by our cyber defense operations. Data is encrypted with the latest TLS protocols
- **Compliance:** we adhere to best practice 3rd party standards like ISO27001, PCI DSS, and SOC2 for security and controls
- **Data ownership:** if you ever desire to leave, we will not hold your data hostage
- **Responsible AI:** our commitment to ethical use of new technologies is evident in our people-first principles on our website



Transform your mission impact

Selecting Sage Intacct as your financial management solution means partnering with the proven leader in nonprofit technology. This partnership delivers more than software—it provides a pathway to achieving greater mission impact through:

Operational excellence

Transform your financial operations through intuitive automation, providing real-time insights across your organization. Purpose-built workflows streamline compliance requirements while integrated systems ensure seamless data flow between departments and applications.

Strategic growth

Scale operations confidently with an infrastructure designed to evolve alongside your organization. Leverage multi-dimensional reporting and proven nonprofit best practices to drive data-driven decisions that support sustainable growth and enhanced mission delivery.

Mission focus

Redirect valuable time and resources from administrative tasks to mission-critical programs. Through improved efficiency and clear outcome measurement, demonstrate enhanced stewardship to donors while maximizing the impact of every dollar invested in your mission.





What our customers say

Real results from nonprofit organizations demonstrate the transformative impact of Sage Intacct.

Proven results

“Though Sage is a large organization, they really listen to and think about their clients’ needs. We always look forward to the quarterly releases, and we use the learning center to explore a particular capability or issue. There’s also the Sage Intacct community, where we can reach out to other nonprofits for tips or provide feedback on things that have helped us.”

Michael Smith

Senior VP of Finance and Accounting, Operation HOPE

Sage

Operational efficiency

“We’ve almost quadrupled the number of families we’ve served in the last 8 years, but we haven’t even doubled the size of our staff.”

Aaron Sibley

Site Design and IT Project Manager, Atlanta Habitat for Humanity

Enhanced collaboration

“Our finance and programs teams have never worked so collaboratively before, and this is even reflected in how we work with our auditors and other software vendors.”

Marlena Wong

CFO, Koret Foundation

Implementing Sage Intacct creates immediate efficiency gains while building a foundation for sustainable growth. The straightforward implementation process, backed by dedicated support and proven methodologies, ensures your organization can quickly begin realizing benefits.

No matter the size or complexity of your nonprofit, Sage Intacct provides the tools, expertise, and support needed to maximize your mission impact.

Ready to transform your financial operations?

Visit sage.com/nonprofit.

Key achievements and performance metrics

Organizations implementing Sage Intacct benefit from:

6

month payback on investment

#1

in customer satisfaction

50%

reduction in manual reporting time

#1

choice for nonprofits



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