

# Take the pain out of project financial management

Keep projects productive and profitable from start to finish with outsourced accounting and advisory services, powered by Sage Intacct.

Keeping track of project financials, contracts, and resources can be complex and cumbersome, especially if your workflow is spread out across numerous systems. By outsourcing your finances and accounting, you can remove that stress from your team's plate entirely.

You'll get big-picture project costing and billing insights delivered directly to you, so you understand what's happening with your projects and get alerted to red flags right away. That way, you can start and finish projects on time, stay within budget, and keep projects productive and profitable—without ever having to sift through granular financial data again.

## Make better decisions with actionable insights

You don't have time to contend with project financial data in different systems. You need a single source of truth that gives you a high-level overview of all projects, allowing you to easily track milestones, costs, profitability, and more. With those insights at your fingertips, you always have what you need to make the best decisions for your business.



## Keep projects on track

Understand the true costs of past projects, so you can create smarter estimates that protect and improve profit margins. We'll deliver a real-time view of what's in the pipeline, help you line up schedules and materials, and automate processes to ensure your projects are primed for success.

## Improve project workflows

You want your team to spend more time with clients and less time managing costs, tracking time, and tracking actuals against estimates. Outsourced accounting and advisory services can help you streamline workflows while providing your team with access to critical insights on project progress and invoicing.

## Simplify billing and revenue recognition

Generate project invoices in the right format, using the right terms and the right amounts, every time. We'll not only automate the billing process, but also keep revenue recognition separate from billing and automate the calculations and postings based on milestones, schedules, or percentage completion.

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# Project-based businesses choose to outsource their finances to:

## Save time on billing processes

You're looking to minimize revenue leakage and the time you spend on billing, all at once. With outsourced accounting and advisory services, you'll gain automated invoicing of time-and-expense or fixed fee billing and capture billable and non-billable transactions. Then, we'll generate custom invoices that include time, materials, and other company charges to bill based on milestones, scheduled dates, or percentage completion. After the invoice is out the door, you can always access invoice information with a detailed audit trail of any overrides made to billing rates, quantities, and amounts.

## Increase forecast accuracy

It's critical for project-based businesses to understand and—as best as possible—predict their revenue. To get better forecasts, you need to decouple billing from revenue recognition, something we're able to do right away. From

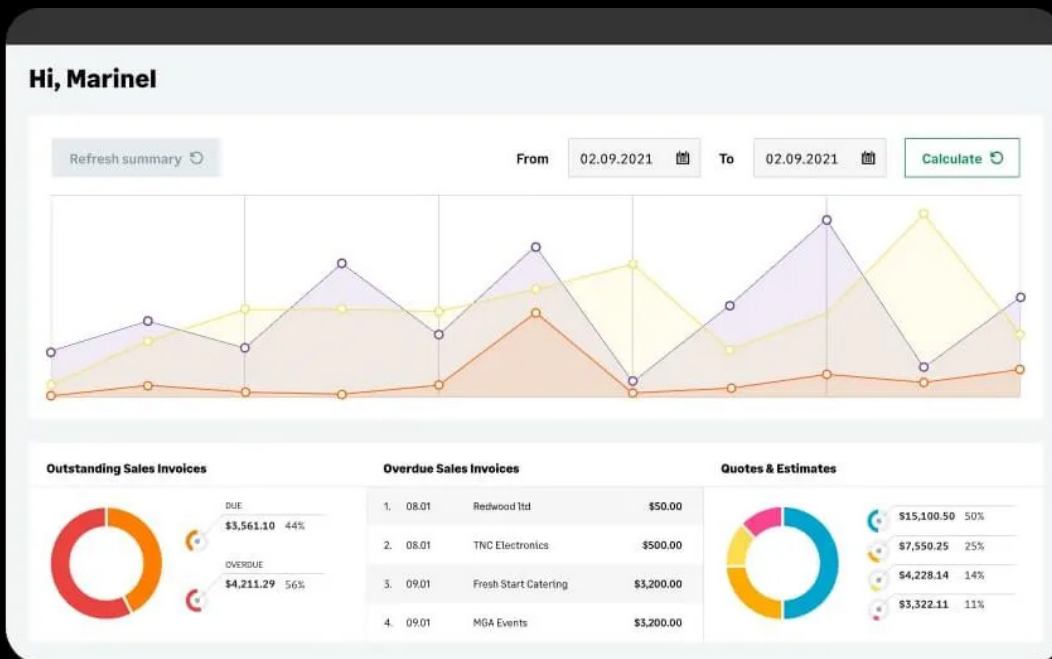
there, we'll set revenue recognition schedules by project phase using milestones, schedules, percentage completion, and project completion methods. And if things don't go according to plan, we can always pause, resume, modify, or cancel in-progress revenue recognition schedules with complete flexibility and accuracy.

## Leverage real-time and historical reporting

Role-based real-time dashboards and reports deliver fast, visual updates on all aspects of the business. They can also be completely tailored to your business: we'll collaborate with you to determine what insights you need, then develop custom reporting to deliver insights you can really use. You'll also get historical insights you can use to analyze key metrics including past project profitability, job costs, and estimate vs actual data. We can slice that data any way you want—allowing you to compare this information by project, customer, or other business drivers.

## Integrate external systems

We use the best-in-class Sage Intacct platform for our clients, meaning you'll never be at risk of vendor lock-in or settling for an all-in-one suite that may not be the best solution for all areas of your organization. You have the power of choice in customer relationship management solutions like Salesforce, professional services automation, or field operations tools. The Sage Intacct open API lets us integrate all of your applications, so your systems are all working together to help your business succeed.



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Add your firm name and value prop, call to action, etc.

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