

Modernizing ERP: From Ground to Cloud with Sage Intacct

Legacy ERP holding you back? Discover how modern cloud ERP with Sage Intacct can help deliver real-time visibility, automation, and scalability—live in action.

June 2026

forv/s
mazars

U.S. Presence

Leading U.S. Firm

\$2.2bn

Revenue (FY 2025)*

76

Markets

30

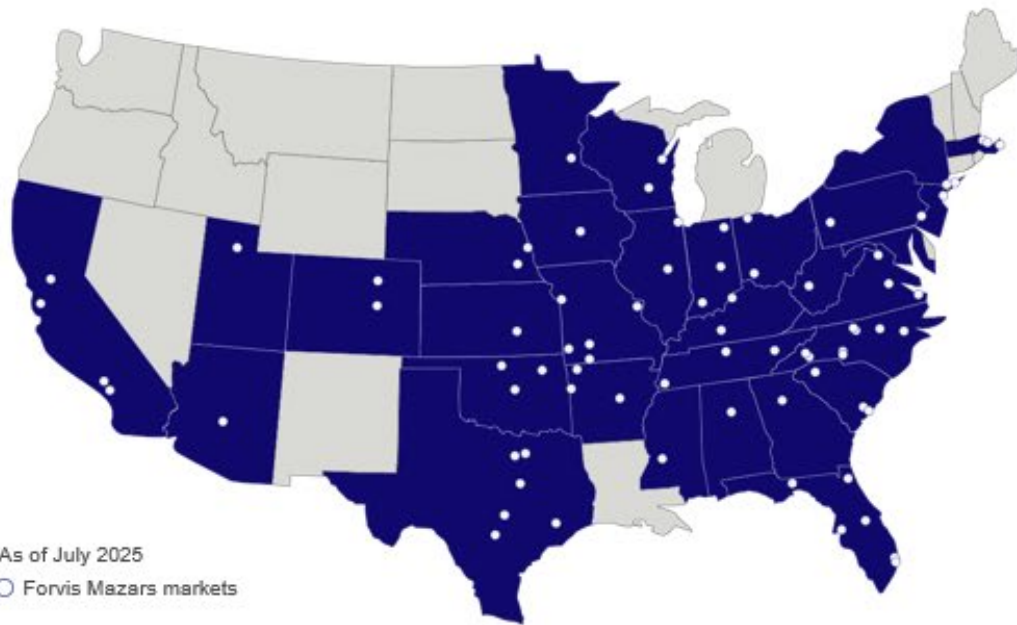
States

600+

Partners & Principals

7,000+

Employees



As of July 2025

○ Forvis Mazars markets

Alabama
Birmingham

Arizona
Phoenix

Arkansas
Fort Smith
Little Rock
Rogers

California
Irvine
Los Angeles
Sacramento
San Jose

Colorado
Colorado Springs
Denver

Florida
Boca Raton
Fort Lauderdale
Jacksonville
Orlando
Tallahassee
Tampa Bay

Georgia
Atlanta

Illinois
Chicago
Decatur

Indiana
Evansville
Fort Wayne
Indianapolis

Iowa
Des Moines

Kansas
Wichita

Kentucky
Bowling Green
Louisville

Massachusetts
Boston
Brewster
Chestnut Hill

Minnesota
Minneapolis

Mississippi
Jackson

Missouri
Branson
Joplin
Kansas City
Springfield
St. Louis

Nebraska
Lincoln
Omaha

New Jersey
Iselin

New York
Long Island
New York City

North Carolina
Asheville
Charlotte SouthPark
Charlotte Uptown
Greensboro
Greenville
Hendersonville
Raleigh
Winston-Salem

Ohio
Cincinnati
Toledo

Oklahoma
Enid
Oklahoma City
Tulsa

Pennsylvania
Fort Washington
Pittsburgh

South Carolina
Charleston
Greenville
Summerville

Tennessee
Knoxville
Memphis
Nashville

Texas
Austin
Dallas
Fort Worth
Houston
San Antonio
Waco

Utah
Salt Lake City

Virginia
Norfolk
Richmond
Tysons

West Virginia
Charleston

Wisconsin
Appleton
Madison

*FY 2025 revenue: period ending 5/31/25.




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Business Technology Services

We solve for business challenges and support innovation through technology solutions.

Our toolbox is equipped with leading enterprise resource planning (ERP), customer relationship management (CRM), artificial intelligence (AI), automation, and business intelligence (BI) tools.

Our end-to-end and managed service solutions help clients achieve their digital transformation goals. Services include:

-  Solution Assessment and Selection
-  System Implementation and Integration
-  Process and Technology Design
-  Upgrades, Enhancements, and Automation
-  Training, Monitoring, and Support
-  Implementation Project Rescues
-  Business Intelligence (BI) and Analytics
-  Robotic Process Automation (RPA)
-  Custom Application Development
-  IT and Cybersecurity Managed Services



Today's Presenters



Chad Collett
Marketing Leader
Business Technology Services
Forvis Mazars



Takoradi Harris
Pre-Sales Consultant
Sage Intacct
Forvis Mazars

Agenda

- The Need for ERP Modernization
- Business Drivers for ERP Modernization
- How Sage Intacct Supports Modern Finance
- A Look Inside Featuring a Live Demo
- The ERP Modernization Journey and Next Steps

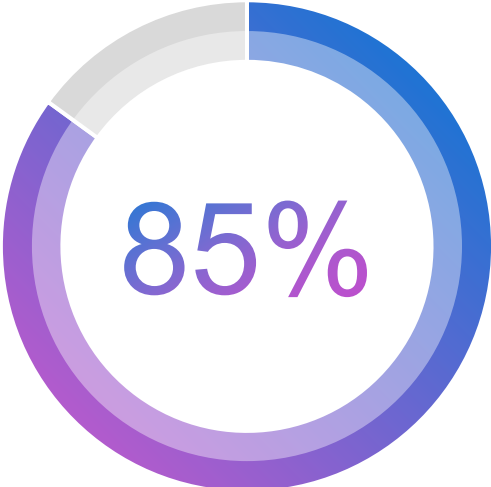


The Need for ERP Modernization



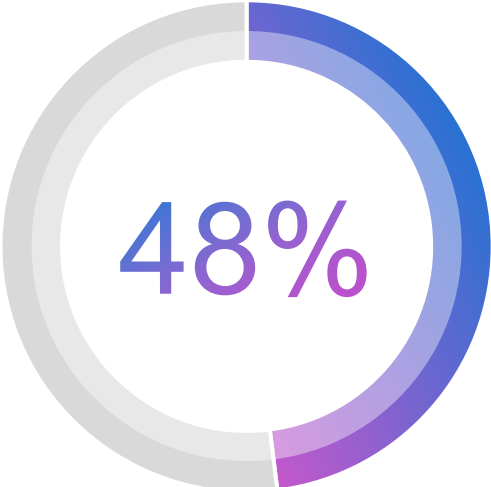
Are You Ready for What Comes Next?

Importance
of ability



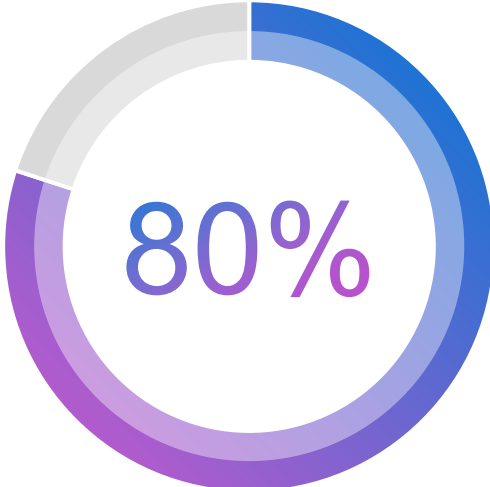
to adapt to change¹

Fragmented
processes



resulting in chaotic work²

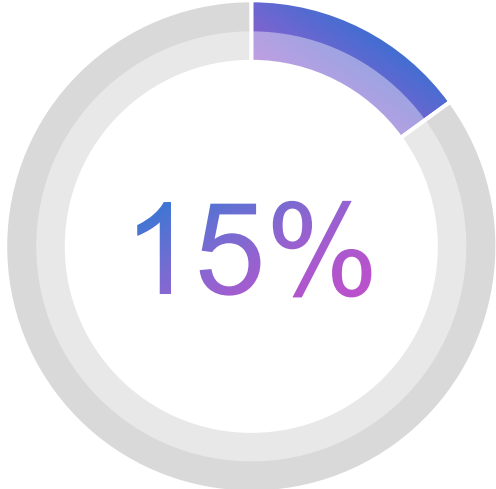
Lack sufficient
time



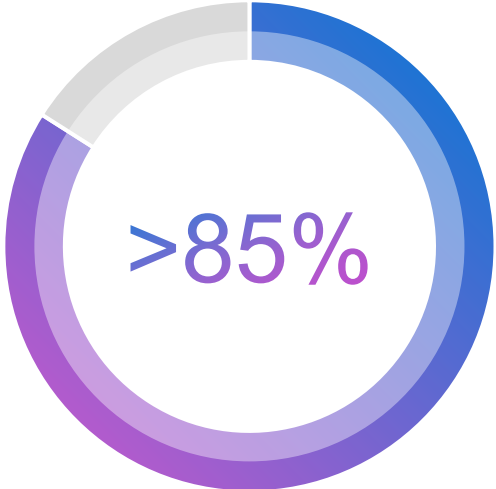
Due to infinite workday to do all
their work³

¹ 2026 [Global Human capital trends](#)
^{2,3} 2025 [Work Trend Index Annual Report, Microsoft](#)

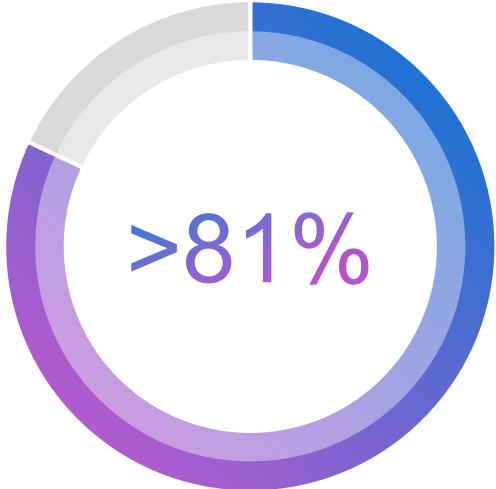
AI Is Reshaping the Future of ERP



of work decisions will be made autonomously through agentic AI by 2028



of workers using AI say it helps them focus on important work



Of leaders expect agents to be integrated into AI strategy in the next 12–18 months

¹ [Gartner, 2025–2026 AI / Agentic AI Predictions](#)

² [Microsoft, Work Trend Index Annual Report, 2024](#)

³ [Microsoft, Work Trend Index Annual Report, 2025](#)

In many cases, ERP systems in use today are **over 10 years old**—twice its intended lifespan.

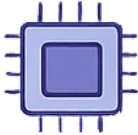


ERP modernization is no longer optional—it's imperative for agility, scalability, and competitiveness.



ERP Modernization

Key Challenges in ERP Modernization



Legacy System Complexity



High Costs & Budget Constraints



Change Management & User Adoption



Data Migration & Integrity



Security & Compliance Risks



Security & Compliance Risks



Integration with Existing Systems



Vendor Selection & Fit

Why Organizations are Moving to the Cloud



Why ERP Modernization Can't Wait

Organizations that delay modernizing systems risk falling behind in agility, scalability, and competitiveness.

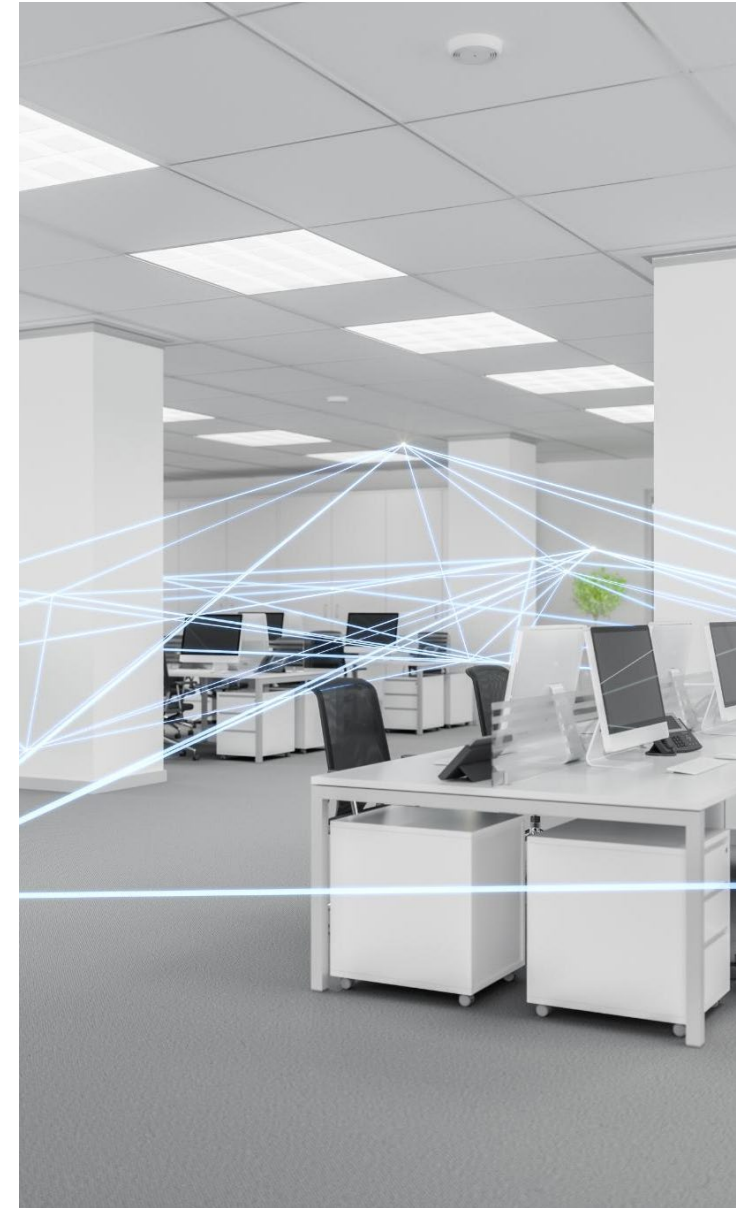
Here's why the urgency is real:

Legacy systems can limit growth—not just slow it

- Not built for modern models (subscription, multi-entity, global ops)
- Heavy reliance on workarounds and manual processes
- Limits scalability and agility as the business grows
- Prevents finance and ops from focusing on strategic initiatives

Real-time visibility is now table stakes for decision-making

- Delayed reporting due to batch processing and reconciliations
- Disconnected systems create inconsistent data
- Limited access to real-time insights and dashboards
- Slows decision-making and reduces confidence in data



Why ERP Modernization Can't Wait

Manual processes are creating risk and inefficiency

- Overreliance on spreadsheets and manual entries
- Increased risk of errors and compliance issues
- Audit challenges due to lack of automation and traceability
- Inefficient workflows reduce overall productivity

Talent expectations have changed—and outdated systems are a liability

- Modern workforce expects intuitive, easy-to-use tools
- Poor user experience impacts productivity and morale
- Increases frustration and employee turnover risk
- Makes it harder to attract and retain top talent



Why ERP Modernization Can't Wait

Integration gaps are holding back digital transformation

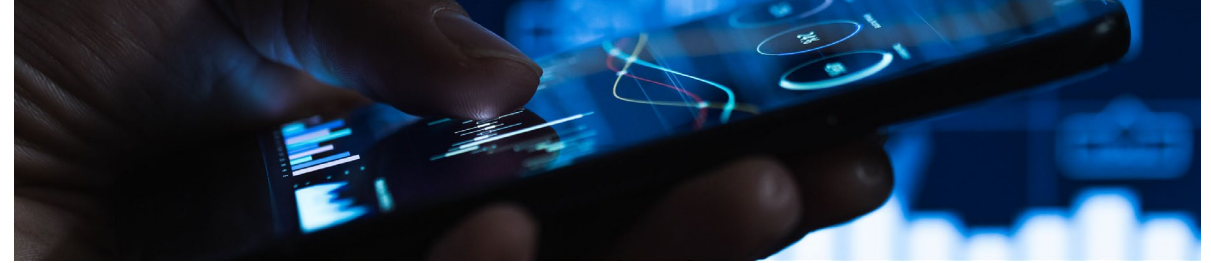
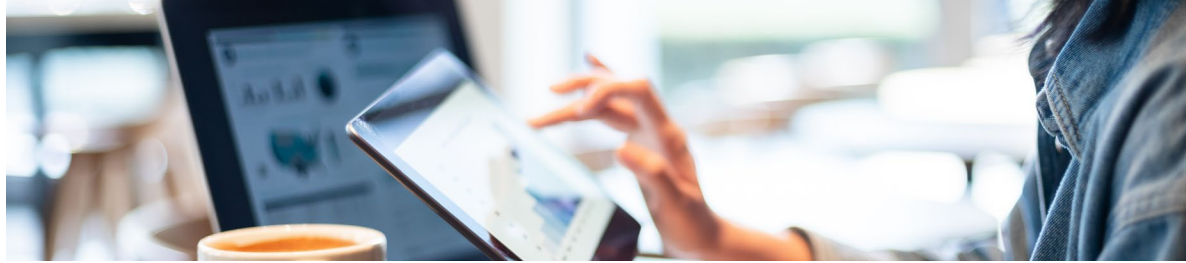
- Disconnected systems require manual data transfers
- Costly and complex custom integrations
- Lack of seamless data flow across business functions
- Slows down innovation and transformation initiatives

The cost of waiting is compounding

- Ongoing spend on maintenance and system workarounds
- Missed opportunities for automation and efficiency gains
- Competitors may gain advantage with modern platforms
- Delays increase long-term cost and complexity of change



ERP Modernization Motivators



Cloud-first strategies

Insight-led decision making

Workforce expectations

Regulatory compliance

Cybersecurity

Business agility and innovation

Operational efficiency

Scalability and adaptability

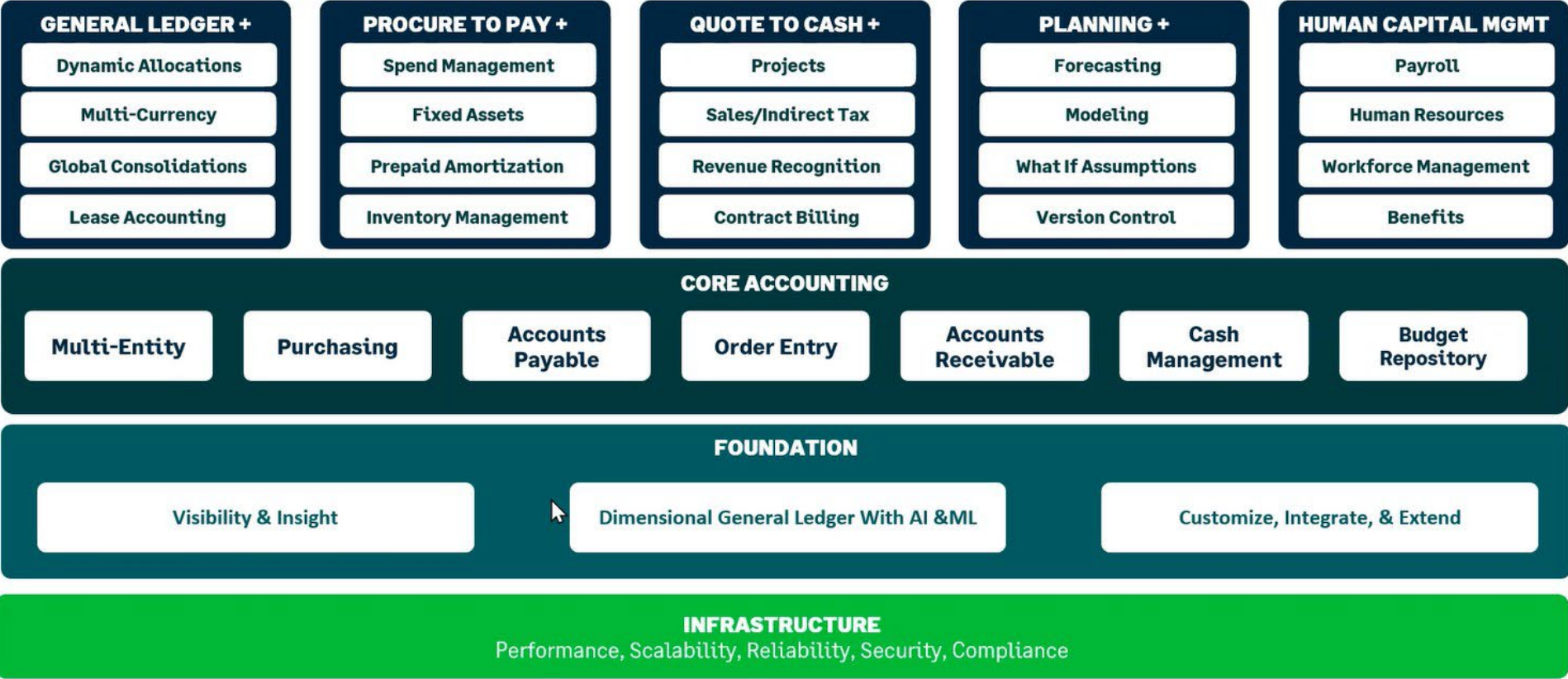
Sage Intacct as a Modern ERP Solution



Sage Intacct

Born in the Cloud

Sage Intacct Solution Map



Sage Intacct

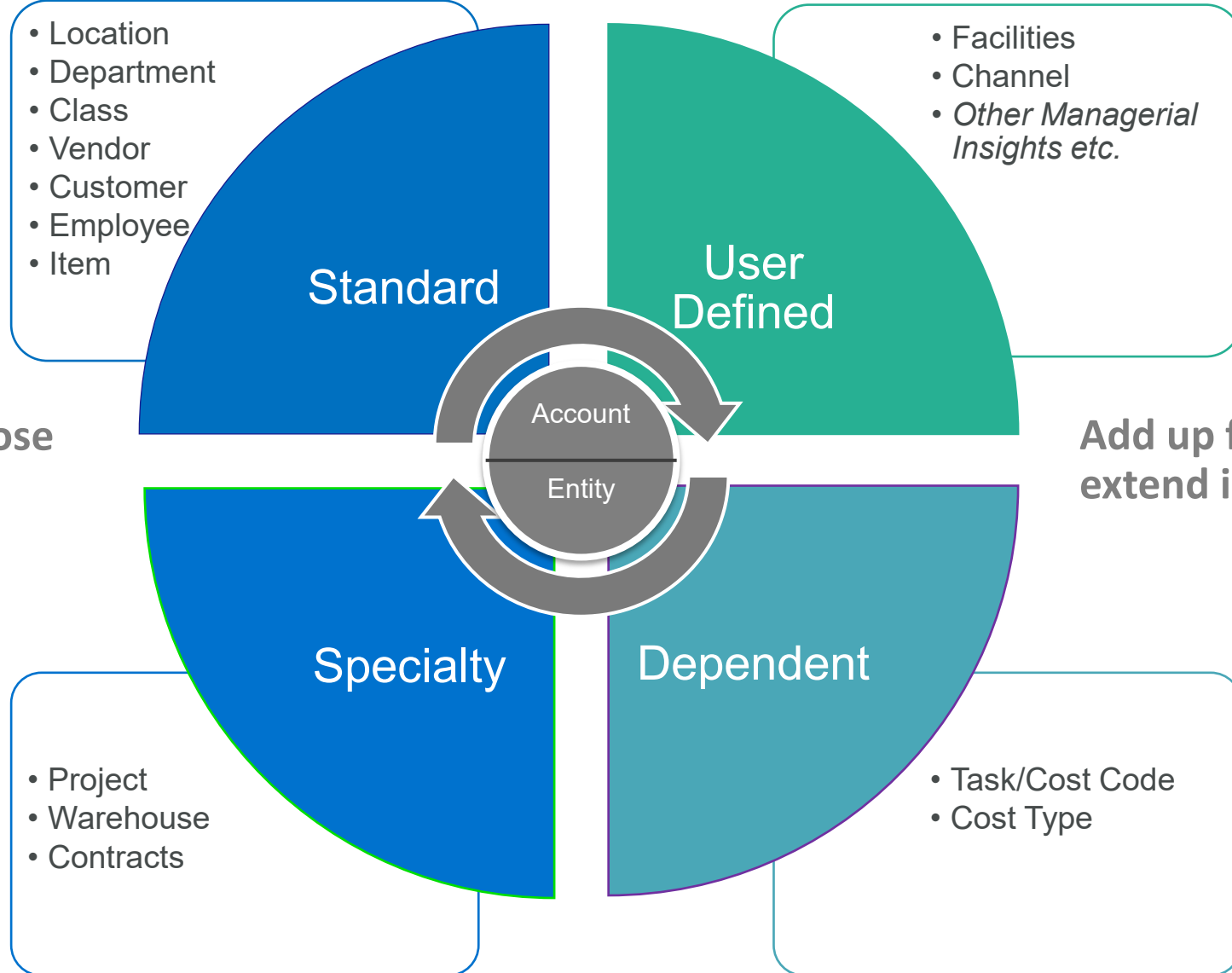
Born in the Cloud

Traditional Chart of Accounts Management - Segments

Entity	Account	Departments	Locations	Grants or Projects or Events	Funds
XX	XXXXXX	XX (alpha only)	XXX	XXXX	XX

Sage Intacct – it's a Dimensional World!

- Report
- Drive Workflows
- Secure Insights



Get angles of analysis

A Modernization Option:

Let's Look at Sage Intacct



The ERP Modernization Journey



From Assessment to Adoption

Assessment and Requirement Definition

- Begin with assessing current systems to identify inefficiencies and define clear business needs for effective ERP modernization.

ERP Selection and Planning

- Choose the right cloud ERP solution aligned with organizational goals and plan for data migration and implementation.

Implementation and Change Management

- Careful execution of implementation, data migration, training, and change management ensures user adoption and project success.

Ongoing Optimization

- Continuous improvement and automation post go-live maximizes long-term benefits and system value.



What Success Looks Like and Where to Go Next

Faster, Accurate Financial Closing

- Modern ERP enables finance teams to close books quickly with enhanced accuracy and confidence.

Real-Time Leadership Visibility

- Leaders gain real-time insights into performance for faster, informed decision-making.

Improved Operational Efficiency

- Automation reduces manual tasks, boosting operational efficiency and strategic finance roles.

Path to ERP Modernization

- Evaluating current ERP, exploring demos, and consulting advisors guide a clear modernization path.



Q and A



Business
Technology
Services

Questions?

Contact

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