



# Modernizing ERP Strategies for Smarter, Scalable Systems

September 2025

# U.S. Presence

Leading U.S. Firm

**\$2.2bn**

Revenue (FY 2025)\*

**76**

Markets

**30**

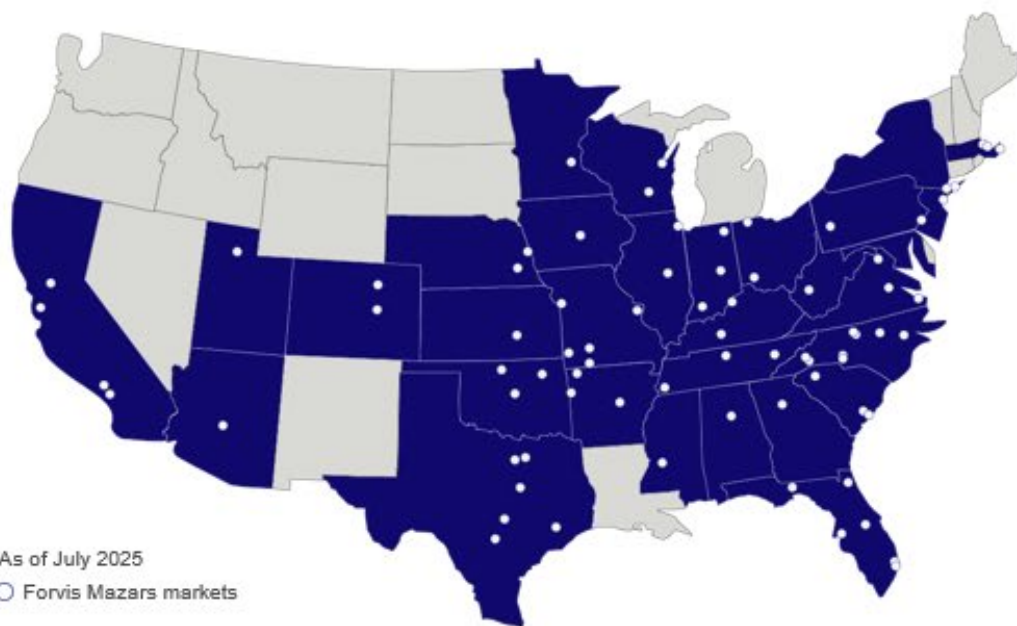
States

**600+**

Partners & Principals

**7,000+**

Employees



**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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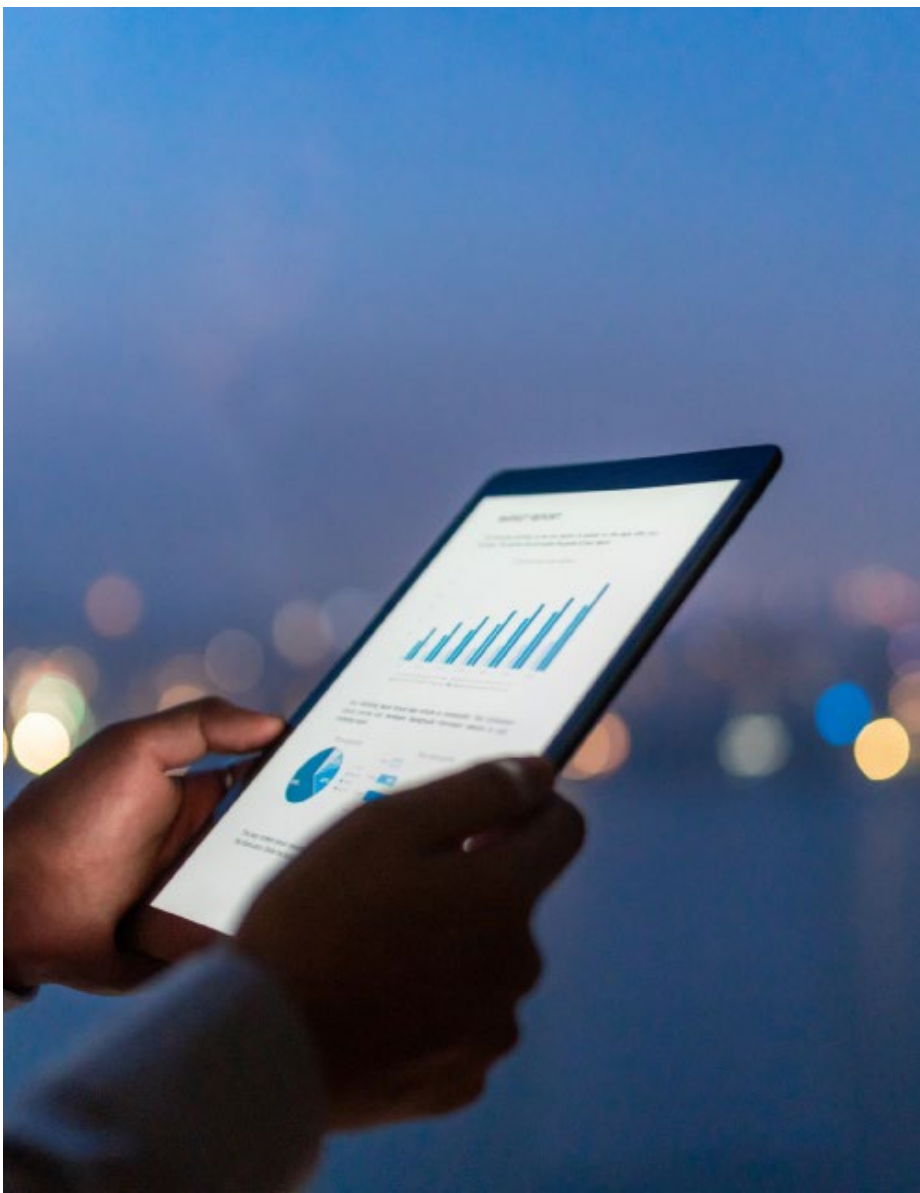
# Business Technology Services

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

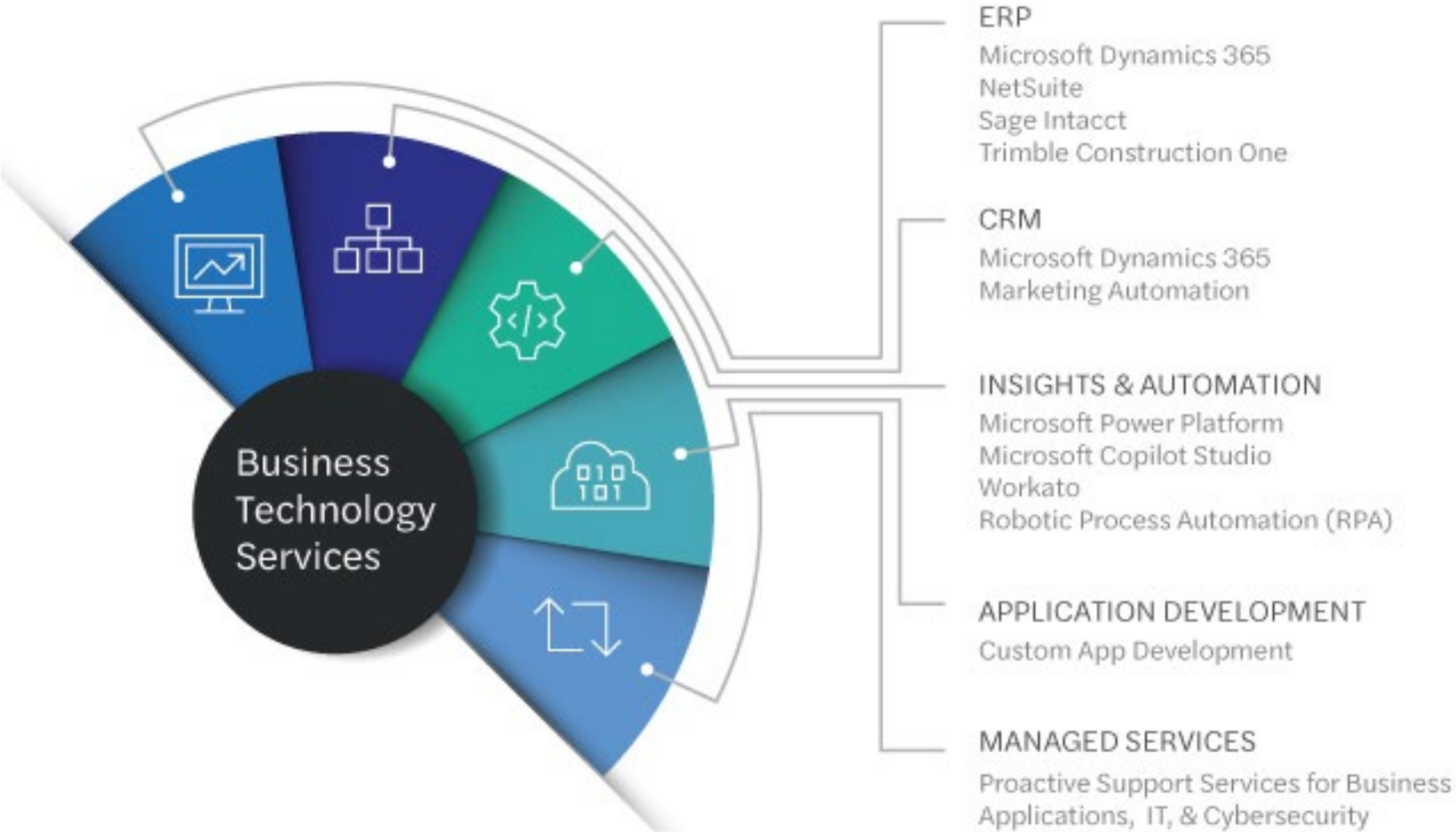
Our toolbox is equipped with leading enterprise resource planning (ERP), customer relationship management (CRM), artificial intelligence (AI), automation, & business intelligence (BI) tools.

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

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



# Premier Technology Partnerships



Microsoft Partner



Trimble Construction One™



# Today's Presenters



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**Chad Collett**

Marketing Leader  
Business Technology  
Services, Forvis Mazars



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**Karen Bodach**

Managing Director  
Sage Practice Lead  
Forvis Mazars



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**Robert Grainger**

Director  
Microsoft SMB Practice Lead  
Forvis Mazars



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**Walter Hilderman**

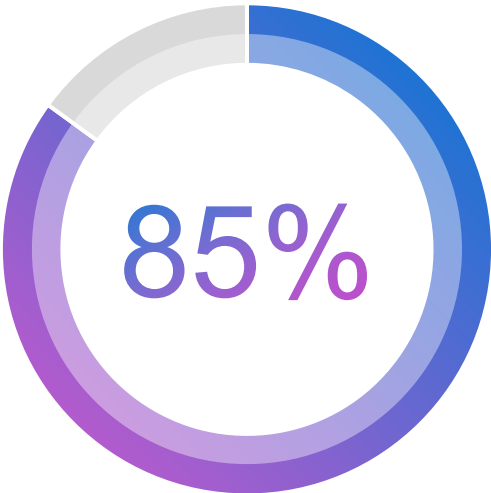
Director  
NetSuite Practice Lead  
Forvis Mazars

# Modernizing ERP



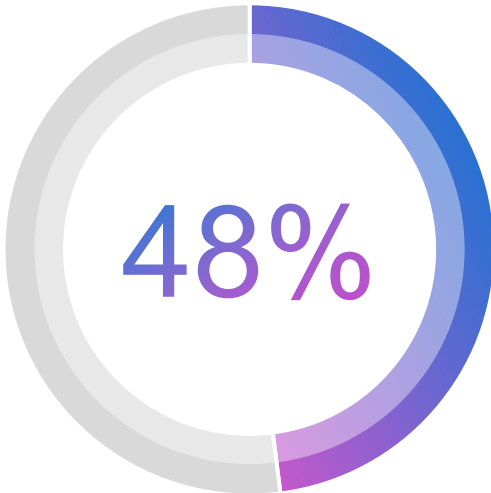
# Are You Ready for What Comes Next?

Lack of  
agility



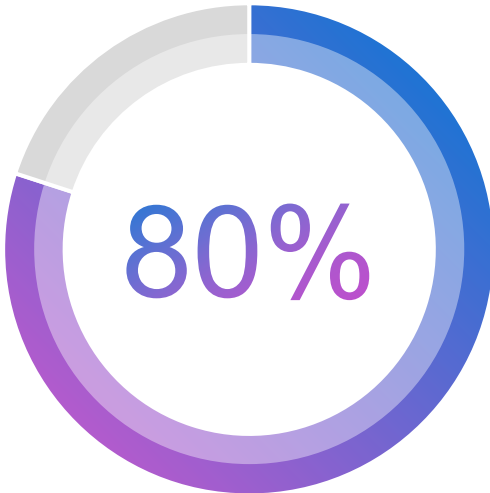
to adapt to change<sup>1</sup>

Fragmented  
processes



resulting in chaotic work<sup>2</sup>

Low productivity

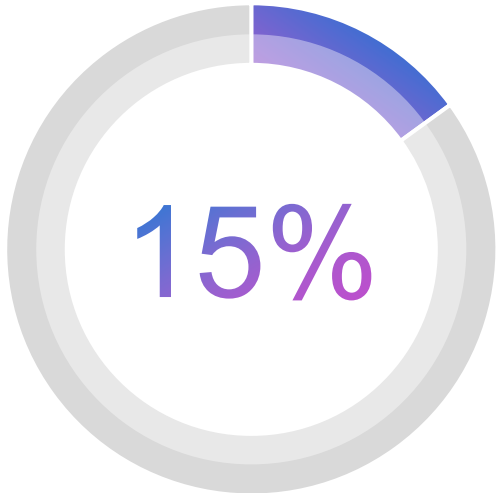


within finance & operations  
teams due to lack of time<sup>3</sup>

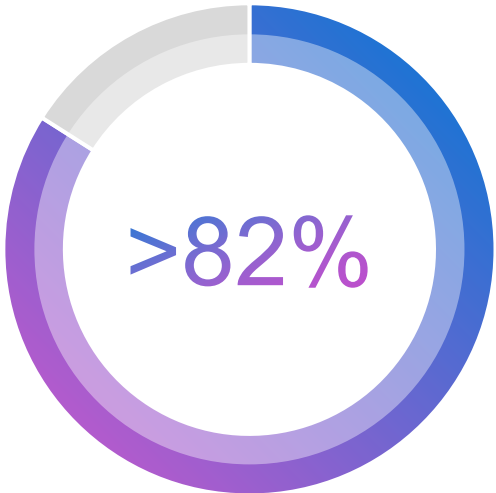
<sup>1</sup> 2025 [Global Human capital trends](#)  
<sup>2,3</sup> 2025 Work Trend Index Annual Report, Microsoft



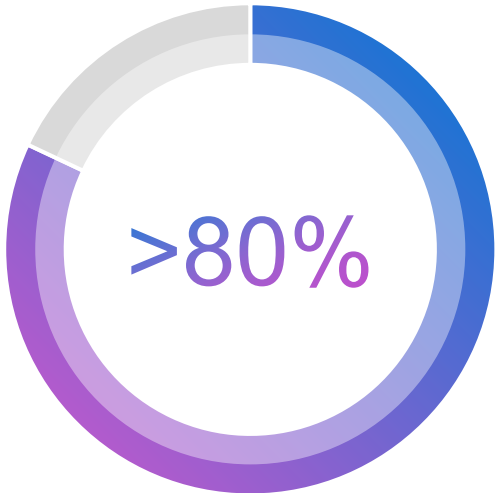
# AI Is Reshaping the Future of ERP



of work decisions will be autonomous by 2028



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



of CFOs & COOs will deploy digital labor to expand workforce capacity in 12–18 months

<sup>1</sup> Gartner The Current State of AI Agents for Enterprises, May 2025

<sup>2</sup> 2024 Work Trend Index Annual Report, Microsoft

<sup>3</sup> 2025 Work Trend Index Annual Report, Microsoft



“The average ERP  
system in use today  
is **over 10 years**  
**old**—twice its  
intended lifespan.”



“ERP modernization is no longer optional—it’s imperative for agility, scalability, & competitiveness.”



# Key Challenges in ERP Modernization



Modernizing ERP systems is a strategic move, but it comes with several challenges your organization should navigate carefully.

# Why ERP Modernization Can't Wait

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

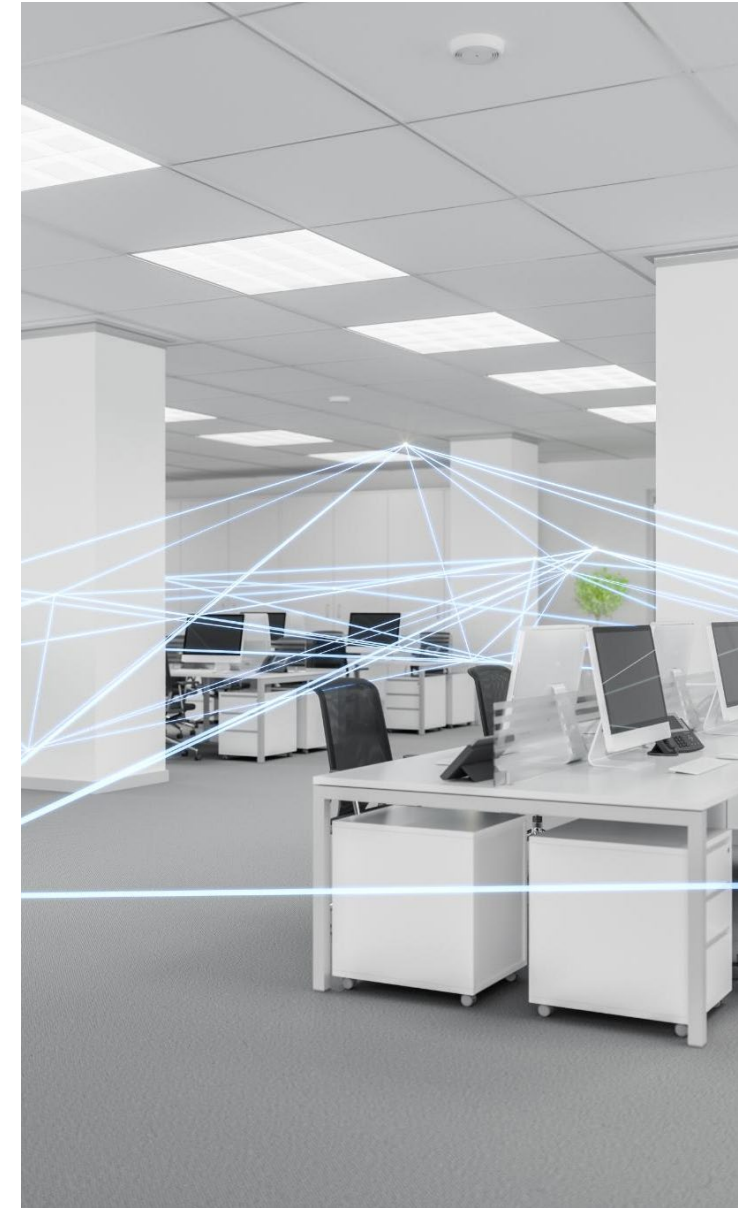
**Here's why the urgency is real:**

## 1. Legacy Systems Are a Liability

- Many ERP systems in use today are **10–20 years old**, far beyond their intended lifespan
- These systems are often **monolithic, inflexible, & expensive to maintain**, consuming IT budget just to resolve technical issues
- They struggle with **data silos, security vulnerabilities, & limited integration** with modern tools

## 2. The Business Landscape Has Changed

- Post-pandemic realities demand **real-time data, remote accessibility, & cloud-first infrastructure**
- Organizations need to pivot quickly in response to market shifts, regulatory changes, & customer expectations, something legacy ERP simply can't support





# Why ERP Modernization Can't Wait

## 3. Modern ERP Enables Strategic Transformation

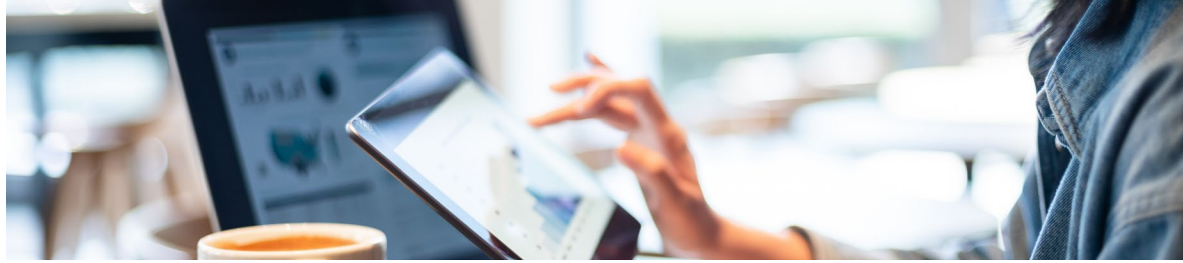
- Modern ERP platforms are **cloud-native, modular, & AI-ready**, enabling:
  - Faster decision making through real-time analytics
  - Operational efficiency via automation & streamlined workflows
  - Scalability for multi-entity, multi-currency, and global operations
- They also support **innovation enablement**, allowing integration with AI, agents, & advanced analytics

## 4. Competitive Pressure Is Mounting

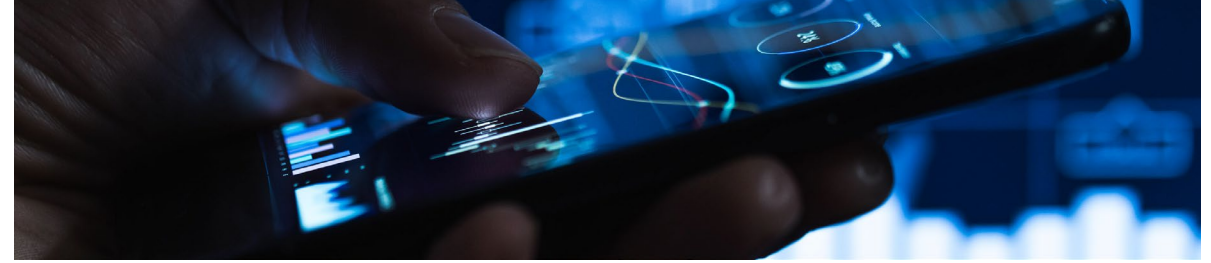
- ERP modernization is now seen as a **lever for transformation**, not just a tech upgrade
- Companies that modernize are better positioned to **attract talent, retain customers, & scale efficiently**



# ERP Modernization Motivators



- Cloud-first strategies
- Insight-led decision making
- Workforce expectations
- Regulatory compliance



- Cybersecurity
- Business agility & innovation
- Operational efficiency
- Scalability & adaptability

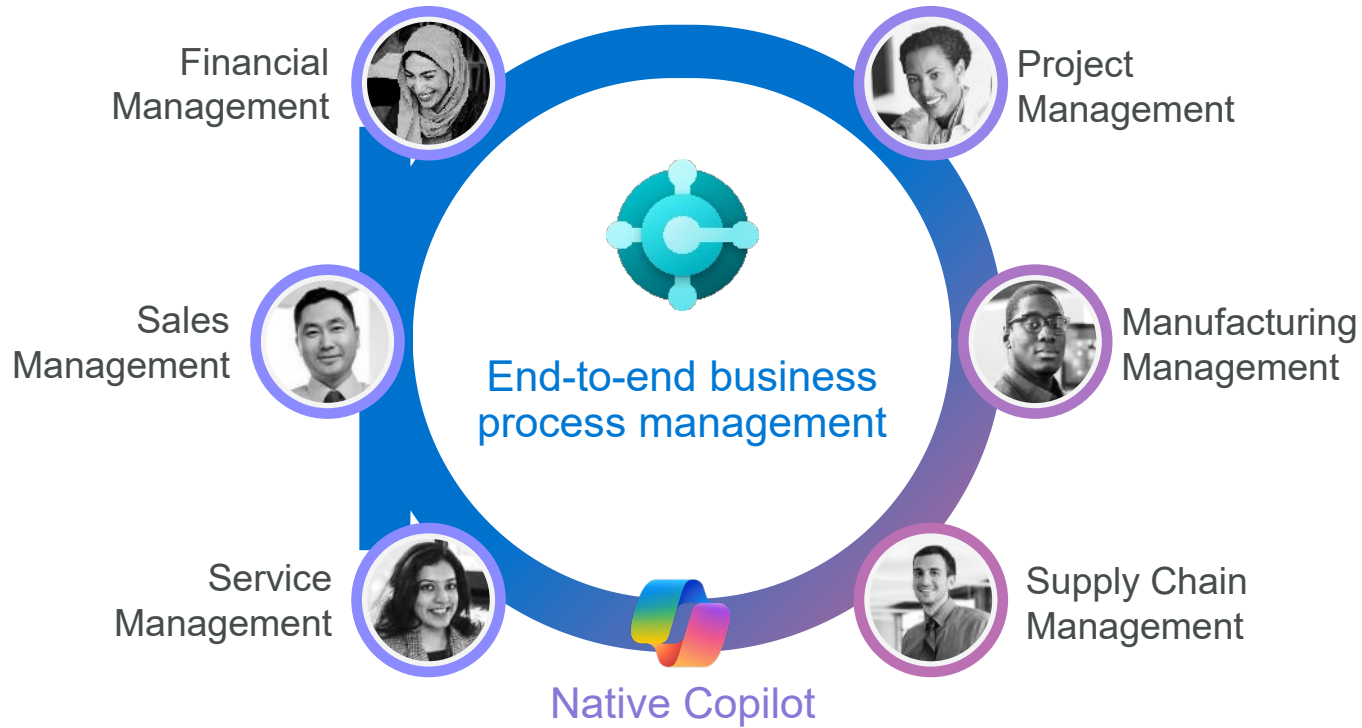
# Leading ERP Solutions



# Microsoft Dynamics 365 Business Central

## A Rock-Solid ERP Foundation

Microsoft Partner



## Enhanced & Extended

with more than 7,000 solutions on AppSource

## Mapped to Your Processes

through the experience & effort of Microsoft partners

## Automated

with the power of prebuilt & custom agents

## Integrated Natively

through the entire Microsoft ecosystem



# Microsoft Dynamics 365 Business Central

Microsoft Partner



## Key Capabilities

- Cloud-Based
- Automation
- Increases Security
- Talks to Other Systems
- Improves Efficiency, Reliability, & Up-Time
- Rapid to Deploy



## Use Cases & Industries

- Non-Verticalized
- Product Depth From Finance & Accounting to Inventory, Fulfillment, Purchasing, Supply Chain, Service, & Warehouse Management
- 80/20 Idea



## Integration & Scalability

- Wide ISV Network
- Flexible, Adaptable, & Configurable
- Extension Architecture
- No Minimums/Affordable
- Reduces Infrastructure & Maintenance

# NetSuite

## A Comprehensive Solution

ORACLE NETSUITE  
Solution Provider

### ACQUIRE & GROW CUSTOMERS



CRM  
CPQ  
e-Commerce  
Point of Sale  
Connectors

Inventory & Order Management  
Procurement  
Warehouse Management  
Supply Chain Management  
Project Management



### HIRE & EMPOWER EMPLOYEES



HR Services  
Performance Management  
Workforce Management  
Payroll

Accounting  
Cash Management  
Analytics & Reporting  
Planning & Budgeting  
Billing & Revenue Management  
Multi-Sub, Currency, Tax, & Language



### CREATE & DELIVER PRODUCTS & SERVICES

### IMPROVE CASH & PROFITS



## Key Capabilities

- Cloud-Native Architecture
- Real-Time Data Access
- Global Accessibility
- Customization & Extensibility
- Security & Compliance
- Mobility & Remote Work Support
- Disaster Recovery & Reliability
- AI Innovations



## Use Cases & Industries

- Business Process Automation & Agility
- Multi-Company Consolidation & Business Management
- Database Replacement
- Operational Impact
- Customer & Vendor Management
- Industry Agnostic



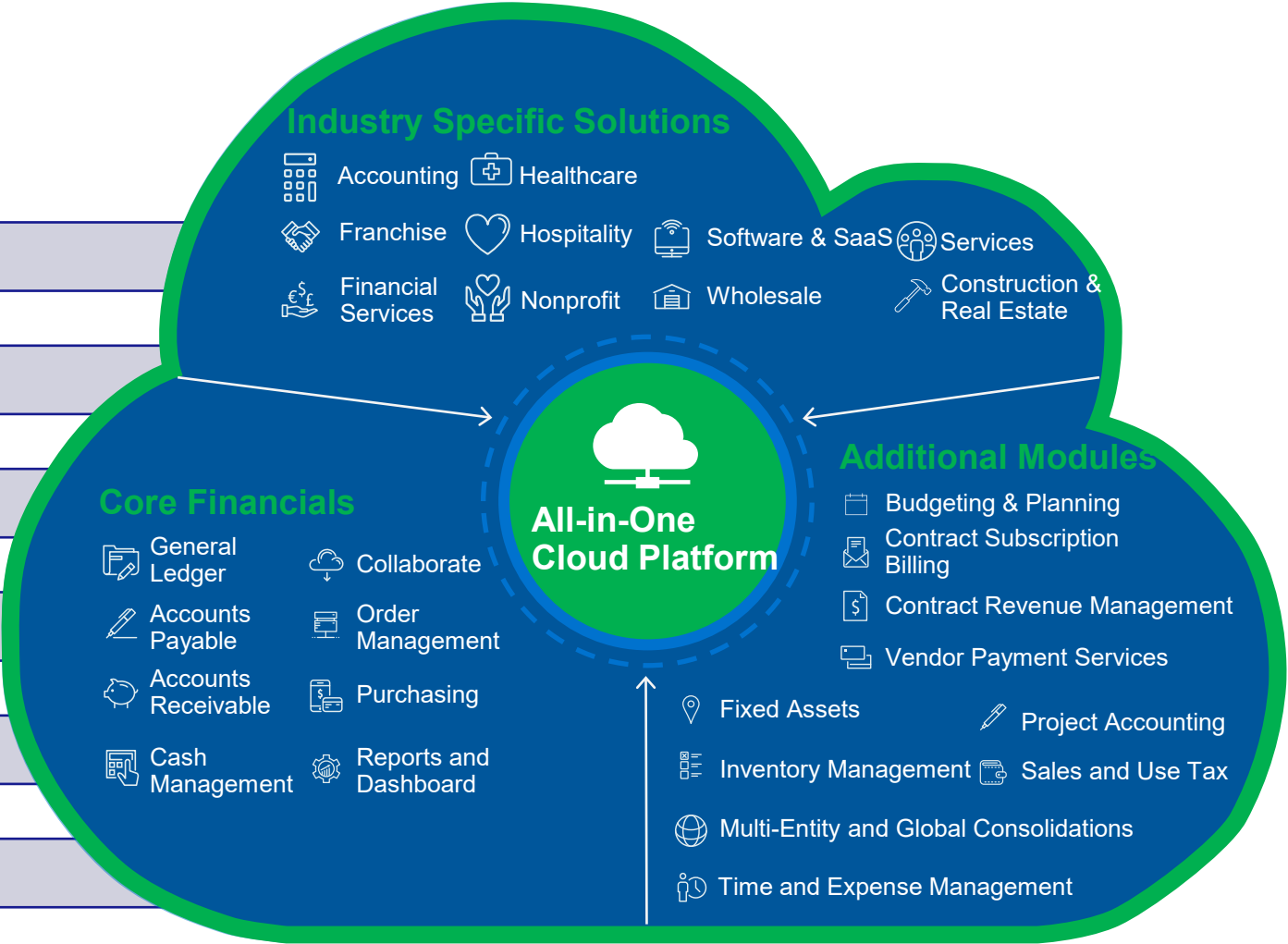
## Integration & Scalability

- SuiteCloud Platform for Custom Apps & Workflows
- SuiteTalk for API-Based Integrations With Third-Party Systems
- Pre-Built Connectors
- Modular Architecture
- Multi-Entity Support
- Global Business Management
- User Role Expansion
- Customization at Scale

# Sage Intacct Born in the Cloud

Sage Partner

- Native Cloud From the 1st Line of Code
- Deep Multi-Dimensional Accounting & Automation for Efficient Financial Operations
- Sophisticated Visibility for Real-Time Decision Making
- Best of Breed, Easy Integration With Other Tools
- Fresh & Modern User Interface
- Designed for CFOs & Finance Teams Seeking a Powerful Solution







## Key Capabilities

- Automation
- Dashboards & Reporting
- Dimensions
- Intelligent General Ledger
- Multi-Entity Insights
- Open API
- HIPAA Compliant
- ASC606 Revenue/Expense



## Use Cases & Industries

- Core Finance
- Healthcare
- Nonprofit
- Professional Service
- Family Offices
- Franchise
- Hospitality
- Software & SaaS



## Integration & Scalability

- Open API
- Marketplace Partner (ISV) Network
- Sage Copilot/AI
- SaaS Solution/Cloud-Based

# Modernizing ERP

## Panel Discussion



# Panel Discussion

## Strategy & Transformation

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- What are the warning signs an organization needs to modernize its ERP?



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## Strategy & Transformation

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- How do you align ERP modernization with long-term business strategy?





# Panel Discussion

## Strategy & Transformation

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- What are the warning signs an organization needs to modernize its ERP?
- How do you align ERP modernization with long-term business strategy?
- What role does cloud adoption play in ERP scalability?

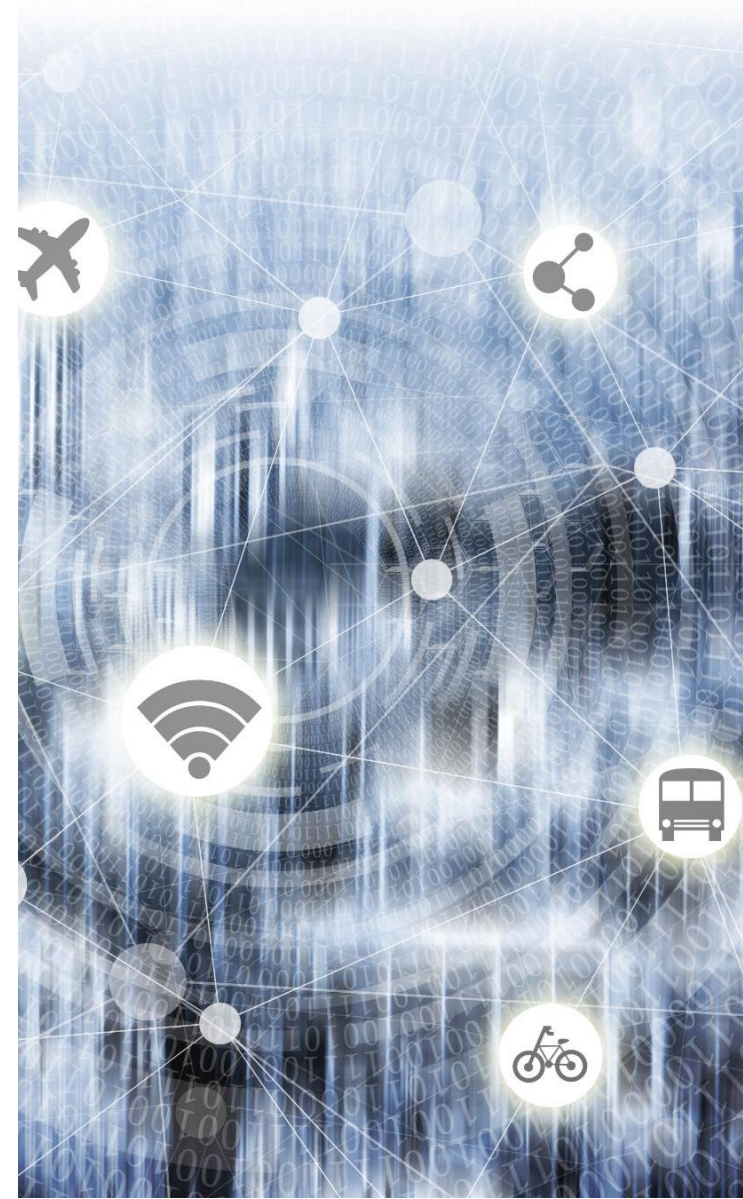


# Panel Discussion

## Solution Fit & Selection

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- How should organizations get started or assess which ERP solution is right for them?

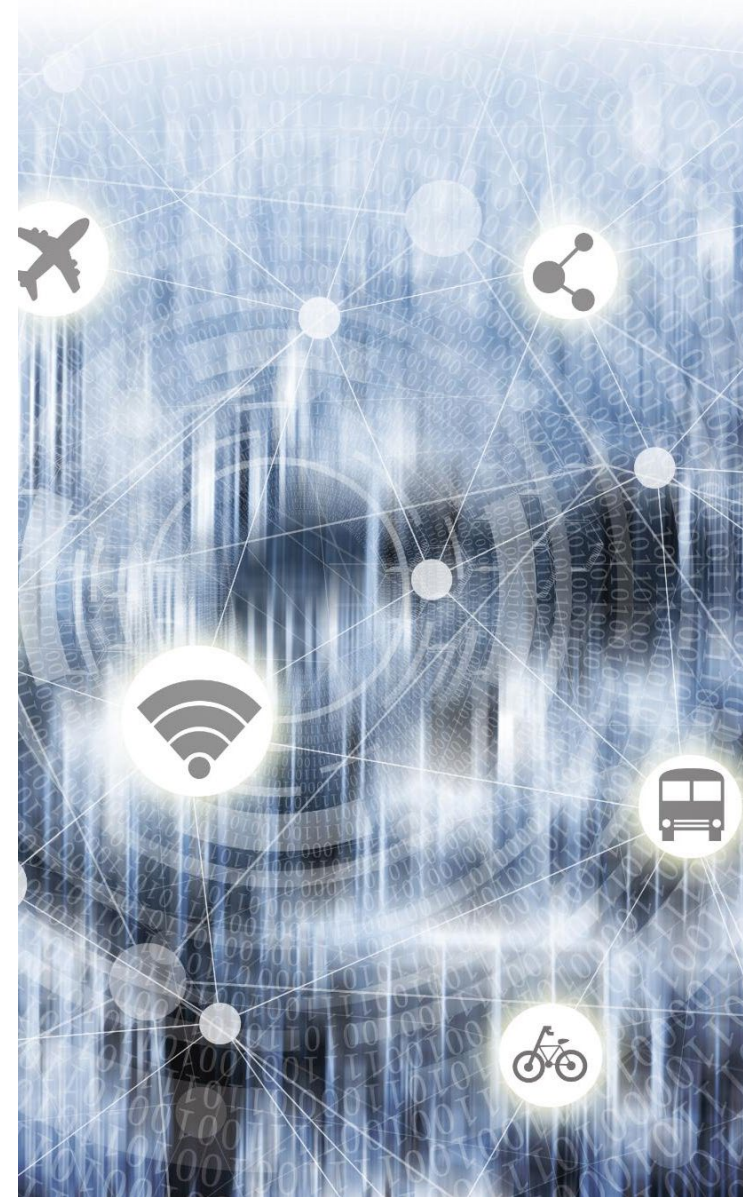


# Panel Discussion

## Solution Fit & Selection

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- How should organizations get started or assess which ERP solution is right for them?
- What are the most common pitfalls & challenges during ERP?
  - Selection
  - Implementation
  - Post Go-Live





# Panel Discussion

## Data & Decision Making

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- How do modern ERP systems improve data-driven decision making?



# Panel Discussion

## Data & Decision Making

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- What analytics capabilities should organizations prioritize?





# Panel Discussion

## Data & Decision Making

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- How do modern ERP systems improve data-driven decision making?
- What analytics capabilities should organizations prioritize?
- How does industry &/or department play a role?

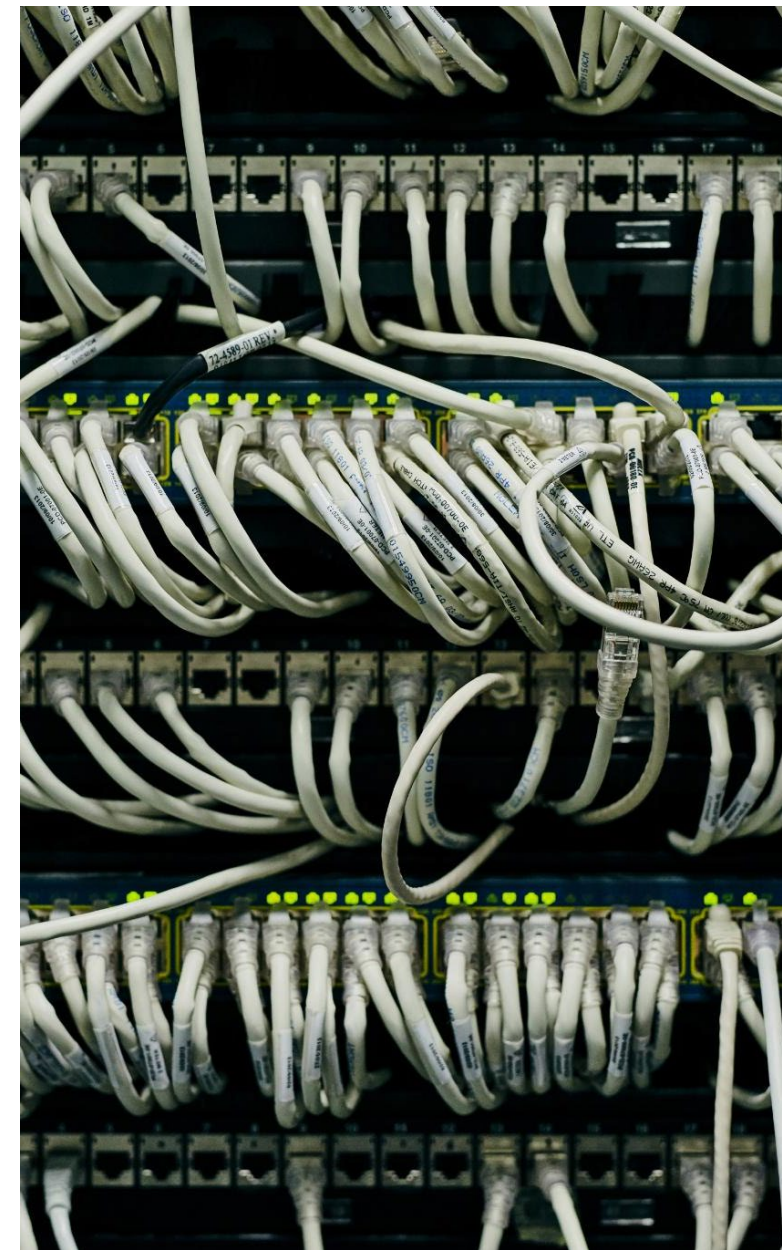


# Panel Discussion

## Risk & Security

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- What are some key security considerations when transitioning from legacy ERP?



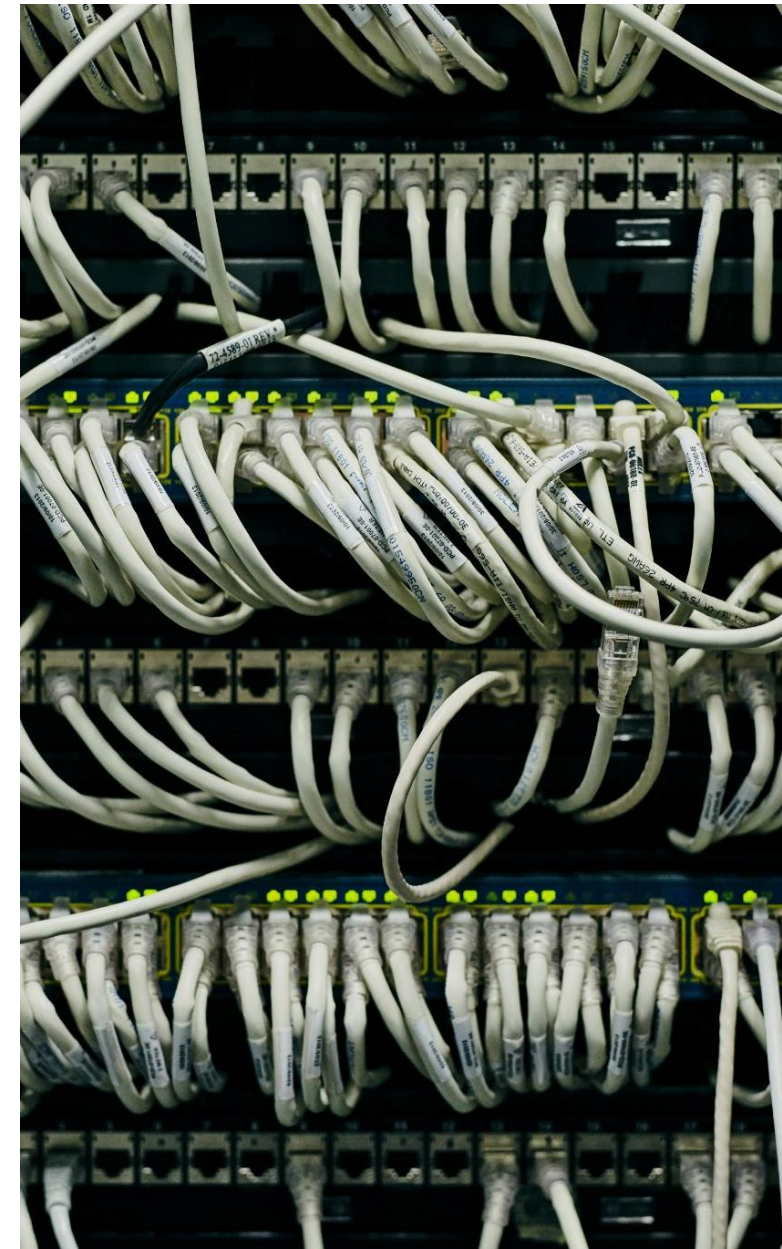


# Panel Discussion

## Risk & Security

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- What are some key security considerations when transitioning from legacy ERP?
- How do modern ERP platforms address compliance & data governance?



# Panel Discussion

## What does the future hold for ERP?

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- What innovations are shaping the future of ERP?





# Panel Discussion

## What does the future hold for ERP?

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- What innovations are shaping the future of ERP?
- How should your organization prepare for continuous ERP evolution?



# Q&A



Business  
Technology  
Services

## Questions?

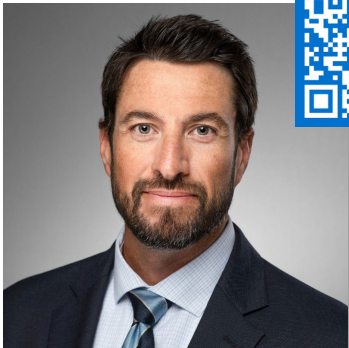
# Closing Remarks & Advice



**Karen Bodach**

Managing Director  
**Sage** Practice Lead  
Forvis Mazars

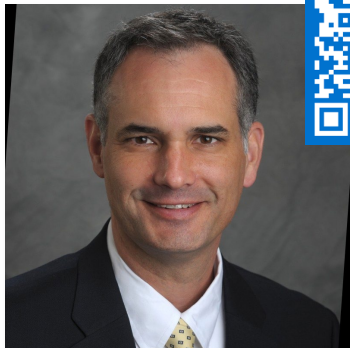
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