



HAT LAW Modernizes Financial Operations With Sage Intacct

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Case Study Snapshot

This case study explores how Hagwood and Tipton, P.C. (HAT LAW), with assistance from Forvis Mazars, implemented Sage Intacct to streamline reporting, improve transparency, and enhance decision making across the firm.

The Situation

HAT LAW's unique shareholder structure required individualized financial tracking. Manual processes and fragmented reporting created delays, inefficiencies, and low morale across the finance team.

The Solution

The firm selected Sage Intacct as its new accounting system and collaborated with Business Technology Services at Forvis Mazars to lead the implementation.

The Benefits

HAT LAW now generates reports in minutes, not hours. Shareholders have greater visibility into their financials, and the firm is positioned to scale without overburdening its finance infrastructure and administration team.

“We needed a system that could handle our unique structure and give our shareholders the clarity they were asking for. Sage Intacct, with Forvis Mazars’ help, delivered exactly that. Our reports are faster, more detailed, and easier to manage. It’s been a game-changer for our firm.”

Amy Leslie
Firm Administrator, HAT LAW

The Full Story

Hagwood and Tipton, P.C. (HAT LAW) is a firm with offices located throughout the Southeast U.S. and features a unique shareholder structure. The firm faced significant challenges managing financial reporting and allocations using Excel and a legacy billing platform. With each shareholder requiring individualized revenue and expense tracking, the firm experienced inefficiencies, delayed reporting, and low morale in the finance department.

By working with Forvis Mazars to help implement Sage Intacct, HAT LAW transitioned to a centralized, cloud-based financial system—achieving real-time visibility, simplified reporting, and improved stakeholder confidence. This transformation reflects Sage's broader innovation strategy to deliver secure, high-impact capabilities efficiently.

The Challenge: Manual Reporting & Shareholder Complexity

HAT LAW's structure required each shareholder to have a distinct allocation of revenues and expenses. As Leslie explained:

“We had general ledger accounts for each shareholder—so we had nine charts of accounts. We also had to sift through ledgers in order to make an Excel spreadsheet that was used as a monthly report. This took hours upon hours. The spreadsheet only had amounts, therefore, shareholders couldn't see what was being charged to them.”

These inefficiencies impacted productivity and morale, with the finance team spending hours on tasks that could have been automated. The lack of transparency also hindered timely decision making and sometimes created friction between departments.



The Approach:

Sage Intacct + Forvis Mazars

HAT LAW selected Sage Intacct for its robust dimensional reporting and ability to support complex financial structures. The selection process was straightforward, stated Leslie:

“We used Tabs3 and honestly didn’t shop other systems. We moved forward with Forvis Mazars as our Sage Intacct implementation partner.”

Forvis Mazars brought experience with legal and professional services firms and a well-structured methodology for configuring Sage Intacct to support multi-entity and partner-level reporting.

The implementation delivered secure, scalable capabilities that directly addressed HAT LAW’s operational challenges and enabled measurable improvements in reporting and transparency.

The Implementation:

Structured & On Schedule

The implementation was smooth and well received. Leslie shared:

“The project went very well. The Sage Intacct team at Forvis Mazars was wonderful to work with. Everything was perfect. The timing was right on schedule. Training was on point.”

The process followed a structured approach:

- **Discovery & Planning:** Identified reporting pain points and mapped out a new chart of accounts structure.
- **Configuration:** Sage Intacct was configured to support shareholder-level allocations and reporting.
- **Data Migration:** The firm transitioned from a legacy system and spreadsheets to a centralized, cloud-based system.
- **Training:** Hands-on training supported adoption across the finance team and firm leadership.

The Outcomes:

Efficiency, Transparency, & Morale

The transformation has been significant, Leslie noted:

“Productivity within our administration team is up and morale is great.”

- **Faster Reporting:** Monthly reports are now generated in minutes instead of hours.
- **Improved Transparency:** Shareholders can now view detailed breakdowns of their allocations, improving trust and reducing back-and-forth clarifications between departments.
- **Scalability:** The firm is now positioned to grow without placing additional strain on its finance infrastructure and administration team.

“Reporting is the biggest win. It’s very easy and quick. Shareholders can drill down into their expenses and revenues to ensure they’re being allocated properly. We’re very happy with Sage Intacct.”

These outcomes reflect the abilities of the Sage Intacct team at Forvis Mazars to support evolving client needs, helping HAT LAW move forward with momentum and further enhance future operations.

Contacts

Karen Bodach

Managing Director

karen.bodach@us.forvismazars.com

Chad Collett

Marketing Senior Manager

chad.collett@us.forvismazars.com

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