Introduction: Bill Constantopoulos
Director, Sage Intacct Practice Leader

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- Over 8 years of experience implementing Sage Intacct

- Started professional career at the Federal Reserve Bank of Boston

- Implemented a diverse range of customized accounting solutions for more than 175 organizations

sage Intacct

AICPA Business Solutions
Preferred Provider of Financial Applications

About Our Organization

115 EMPLOYEES

77 YEARS

41 CPAS

15 PARTNERS

10 SPECIALTIES

Recognized Leadership

- Fastest Growing Firms in New England - *Accounting Today*

- Top 200 Firms - *Inside Public Accounting*

- Regional Leaders – Top Firms - *Accounting Today*

- Top Massachusetts Accounting Firms - *Boston Business Journal*

- Best Accounting Firm –*Banker & Tradesman*

- America's Best Tax & Accounting Firms – *Forbes*

- Best of the Best Firms – *Inside Public Accounting*

Professional Memberships

- American Institute of Certified Public Accountants
- AICPA Employee Benefit Plan Audit Quality Center
- Massachusetts Society of Certified Public Accountants
- Public Company Accounting Oversight Board
- CPAmerica, Inc.
- Crowe Global
- Family Firm Institute
- Family Business Association
- New England Business Association
- Association for Corporate Growth

All You Need to Succeed

CONSULTING

- Cybersecurity & IT Consulting
- Government Grants & Contracts
- Outsourced Accounting & Advisory Services
- Royalty Examinations
- Sage Intacct Accounting Software
- Strategic Business Planning
- Succession Planning
- Transaction Advisory Services

TAX

- Estate & Gift Taxation
- State & Local Tax Services
- Tax Strategy & Compliance

AUDIT & ASSURANCE

- Auditing & Accounting
- Employee Benefit Plan Audits
- Overhead Rate Audits

PRIVATE WEALTH

- Private Wealth Management

g3 Sage Intacct Partnership: VAR & SIAP

- SIAP Partner (Sage Intacct Accountants Program) since 2012

- VAR Partner (Value Added Reseller, Implementations, Ongoing Support) since 2016
  - The only ERP system g3 sells & implements is Sage Intacct
  - g3 also partners with third party applications that seamlessly integrate with Sage Intacct
  - Workato partnership: middleware tool to develop custom integrations/automations for Sage Intacct and other cloud-based applications

- g3 uses Sage Intacct for internal accounting & reporting

- Ability to pull in Sage resources at any time for publisher support

- Our Sage Intacct practice spans across many industries, including but not limited to:
  - NFP & Faith-based organizations (Diocese, Associations, Foundations, Churches, Cancer Care, etc.)
  - For Profit organizations (SAAS, Oil & Gas, Energy, Professional Services, etc.)

Live Sage Intacct Demo

- CFO Dashboard
- Drilldown to detail
- COA design, dimensionality
- Multi-entity, intercompany, consolidations
- Access, security, segregation of duties
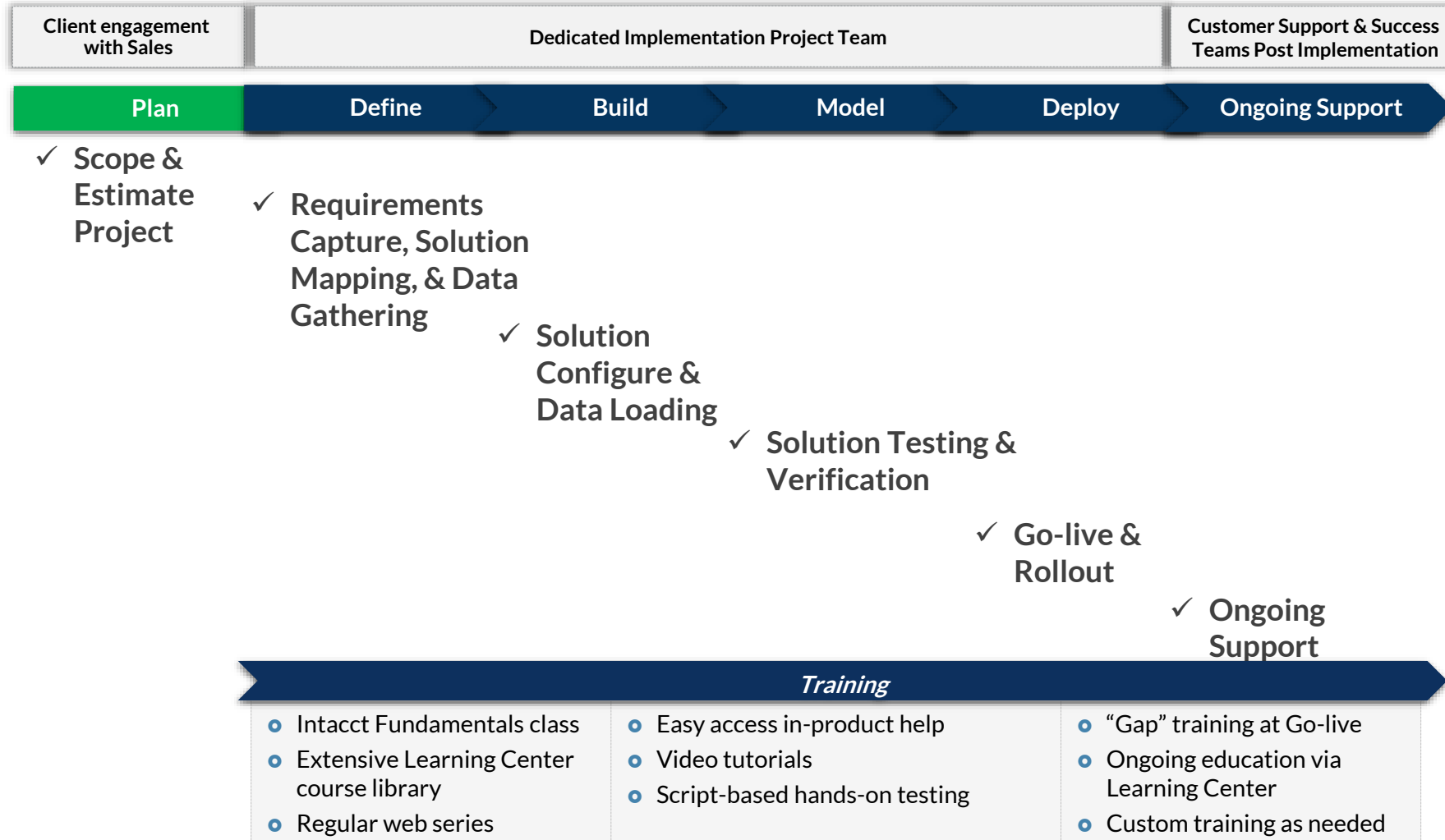- High-level module overview
- Customizations, ease of integration

Discovery & Implementation Methodology

Our Approach to Requirements Gathering

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- Conduct detailed & thoughtful interviews with key stakeholders with the goal of understanding your current state – and the collective vision for your ideal state
  - Interviews are recorded via Microsoft Teams or can be conducted in person

- Understand the totality of your reporting requirements
  - Inclusive of internal & external reporting, consolidated and individualized, non-financial/metrics, etc.

- Understand and document your current Accounting processes for all business areas

- Identify all accounting & finance technologies currently in place and associated flow of data between the various applications

Our Implementation Methodology

Client engagement with Sales	Dedicated Implementation Project Team				Customer Support & Success Teams Post Implementation
Plan	**Define**	**Build**	**Model**	**Deploy**	**Ongoing Support**

- ✓ **Scope & Estimate Project**
- ✓ **Requirements Capture, Solution Mapping, & Data Gathering**
- ✓ **Solution Configure & Data Loading**
- ✓ **Solution Testing & Verification**
- ✓ **Go-live & Rollout**
- ✓ **Ongoing Support**

Training

○ Intacct Fundamentals class	○ Easy access in-product help	○ "Gap" training at Go-live
○ Extensive Learning Center course library	○ Video tutorials	○ Ongoing education via Learning Center
○ Regular web series	○ Script-based hands-on testing	○ Custom training as needed

Key Project Task and Milestones

Phase	Key Task/Milestone	Date or Date Range
Define	Detailed project plan	
Define	Conduct business process review meetings	
Define	Produce functional requirements document and sign-off	
Define	Produce solution definition document	
Build	Configure Production Environment	
Build	Prepare and load master record data	
Build	Provision Implementation Environment	
Model	Define test plan	
Model	Demonstrate configured system	
Model	Conduct end user training & user acceptance testing	
Deploy	Prepare and load final data for Go-live	
Deploy	Go-live on the system	
Deploy	Provide post Go-live support and load post-Go-live data	

Implementation Tools and Technology

- **Collaboration**
  - Teamwork Projects
    - Project plan with milestone sign-offs
  - Series of Define Calls

- **Project Management**
  - Weekly Status Meeting and Report
  - Tailored Functional Requirements and Solution Definition

- **Support Documents**
  - Data upload templates
        Ex: Company Information, Chart of Accounts, Customers, Vendors, Projects, etc.

- **Training and Knowledge**
  - Sage Intacct Learning Center and Community
    - Extensive Help Pages
  - Intacct Implementation Copy Company
  - Remote or in-person Sage Intacct Training
    - UAT scripts

Next Steps

Please contact me at bconstantopoulos@gggllp.com for an extended discovery & demo session.