

Research report

The secrets of successful Finance Leaders

The 3 frontiers of finance leadership

Sage



Executive summary

The 3 frontiers of finance leadership

Dive into the core competencies and visionary approaches that distinguish today's most effective finance leaders in our latest report.

Drawing from a rich tapestry of research, interviews with a broad spectrum of finance leaders, and insights from industry experts, this report uncovers the 3 pivotal ways finance leaders achieve business success:

1. Redefine influence—beyond budget management

Successful finance leaders are expanding their roles beyond traditional budget oversight to foster cross-departmental collaboration. With a 30% increase in such collaborations over the last 5 years, finance leaders are pivotal in enhancing teamwork and dismantling operational silos, redefining their influence.

2. Own the tech-finance fusion

Embracing the integration of technology and finance is key to elevating decision-making and operational efficiency. Despite 87% of finance leaders experiencing regular stress, those who adeptly merge technology into their finance operations report a 20% higher satisfaction level in their roles, showcasing the significance of owning the tech-finance fusion.

3. Balance the ledger of life

The pursuit of a work-life equilibrium remains a formidable challenge, with only 27% of finance leaders achieving a satisfactory balance despite 95% feeling successful professionally. This highlights the ongoing struggle to find harmony between professional achievements and personal well-being, emphasizing the need for financial leaders to balance the ledger of life effectively.



These findings underscore the essence of our report: in a world where change is the only constant, the finance leaders who thrive are those who adapt, innovate, and lead with empathy and insight.

Whether using AI-driven analytics for cost savings, implementing time management strategies, or influencing corporate culture towards sustainability and diversity, see through real-life examples what the transformative potential of visionary financial leadership could look like.

This comprehensive exploration of how finance leaders can transcend traditional boundaries to become catalysts for change and innovation, will help you understand how to power up your finance leadership skills and mindset.

“At Sage, we’ve observed how combining finance with technology gives Finance Leaders the chance to step beyond their traditional roles, offering them a chance to guide their businesses with both flexibility and deeper insight.

As we move forward, the success of Finance Leaders and the businesses they look after will increasingly depend on their ability to adapt, work together, and lead with clear purpose. It’s about leveraging technology to not only enhance their strategic role but also to broaden their influence within the business, setting the stage for a future where Finance Leaders play a pivotal role in shaping their companies’ futures.”

Steve Hare
CEO, Sage Group PLC

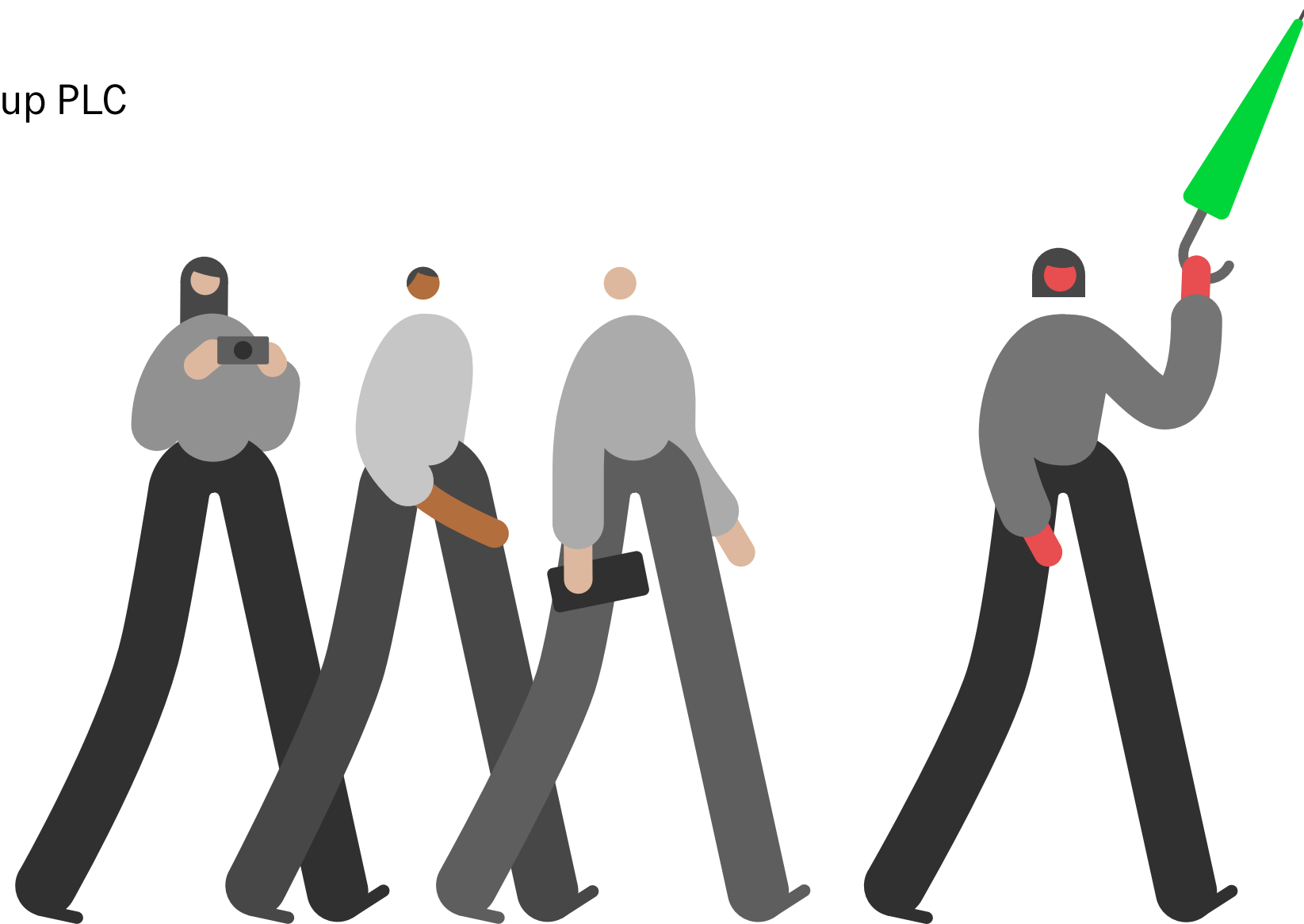


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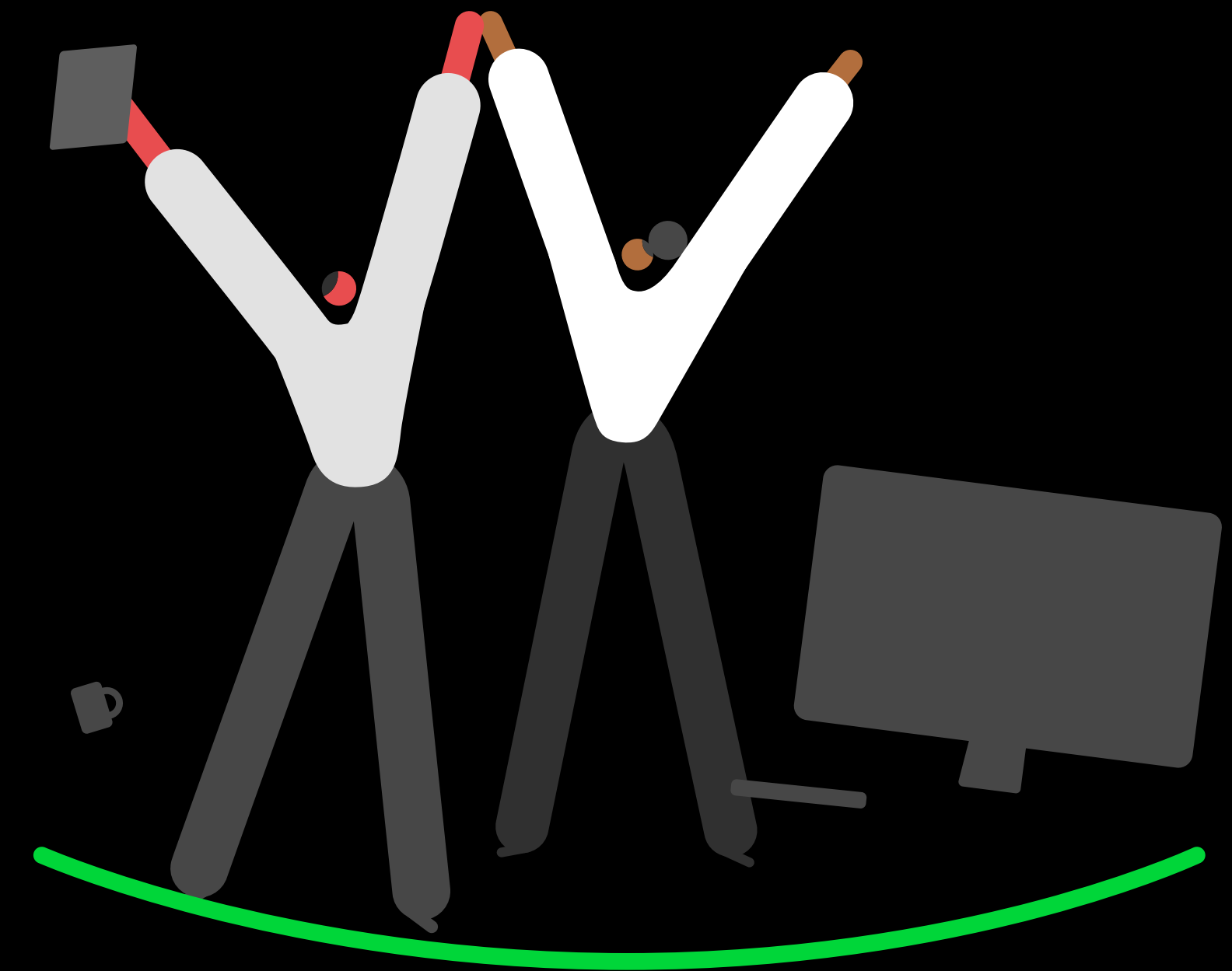
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Who we polled

We spoke to 1,221 senior finance leaders across the globe about their role, what’s keeping them up at night, as well as their views on the future of finance.

Demographic breakdown

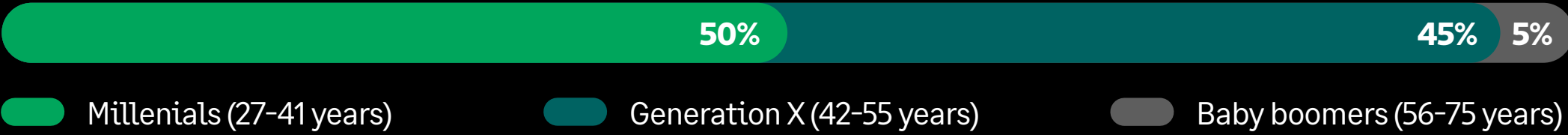
Gender



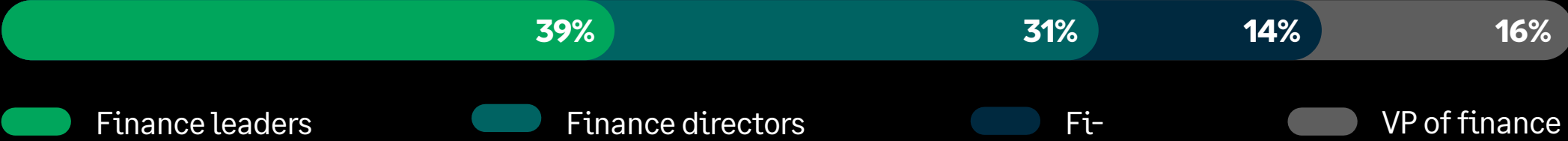
Ownership structure



Age



Roles

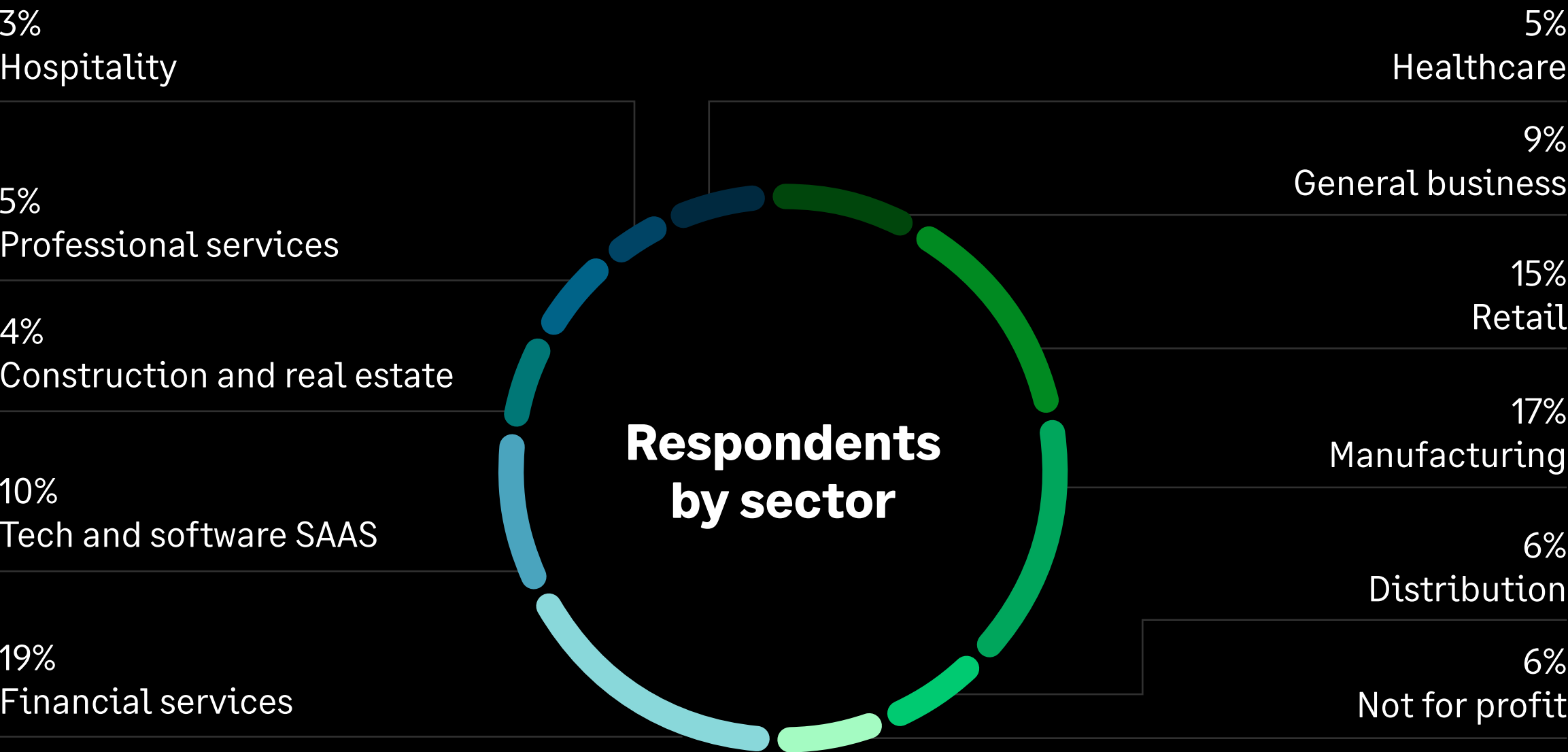
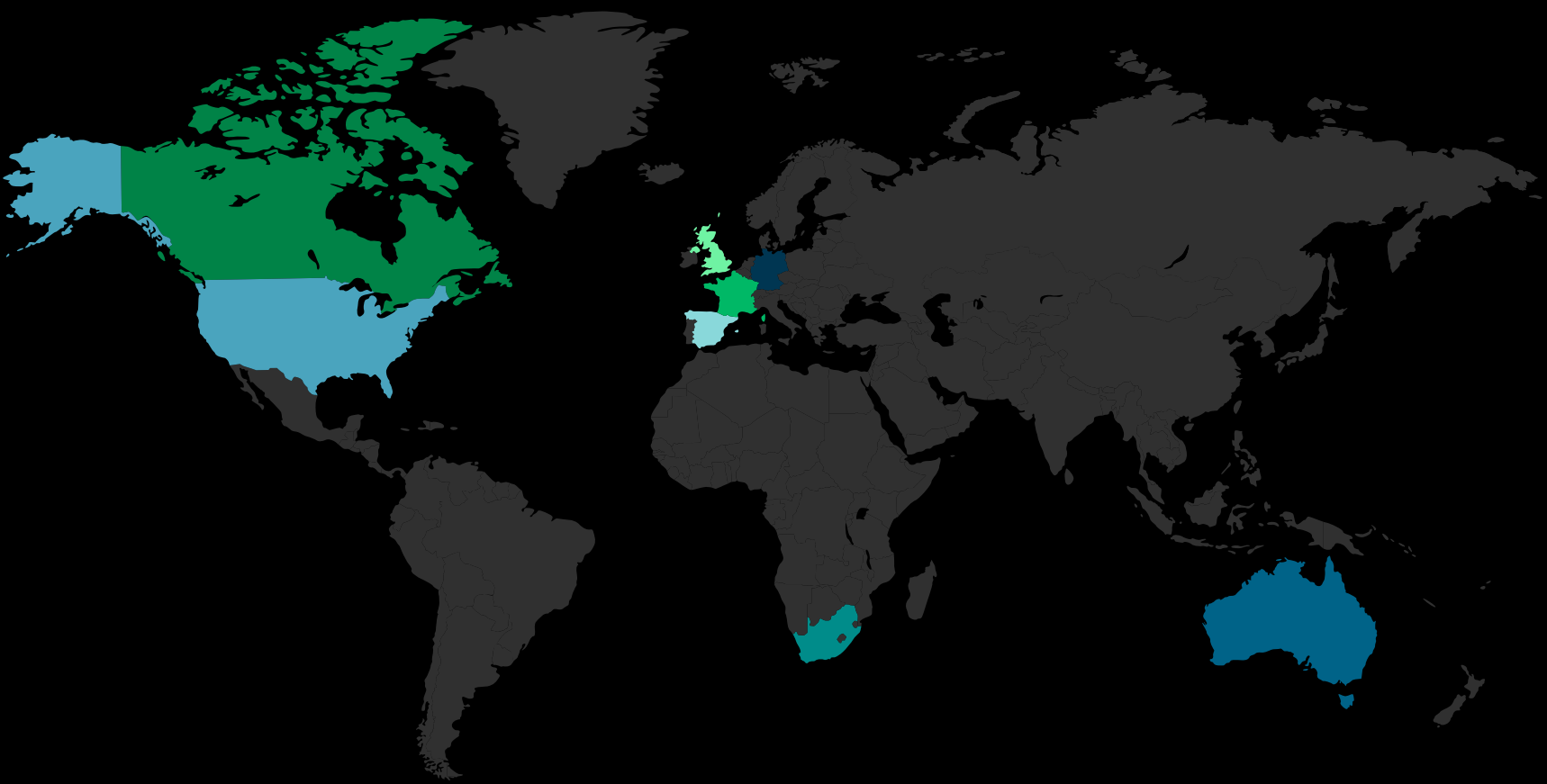


International company



Respondents by country

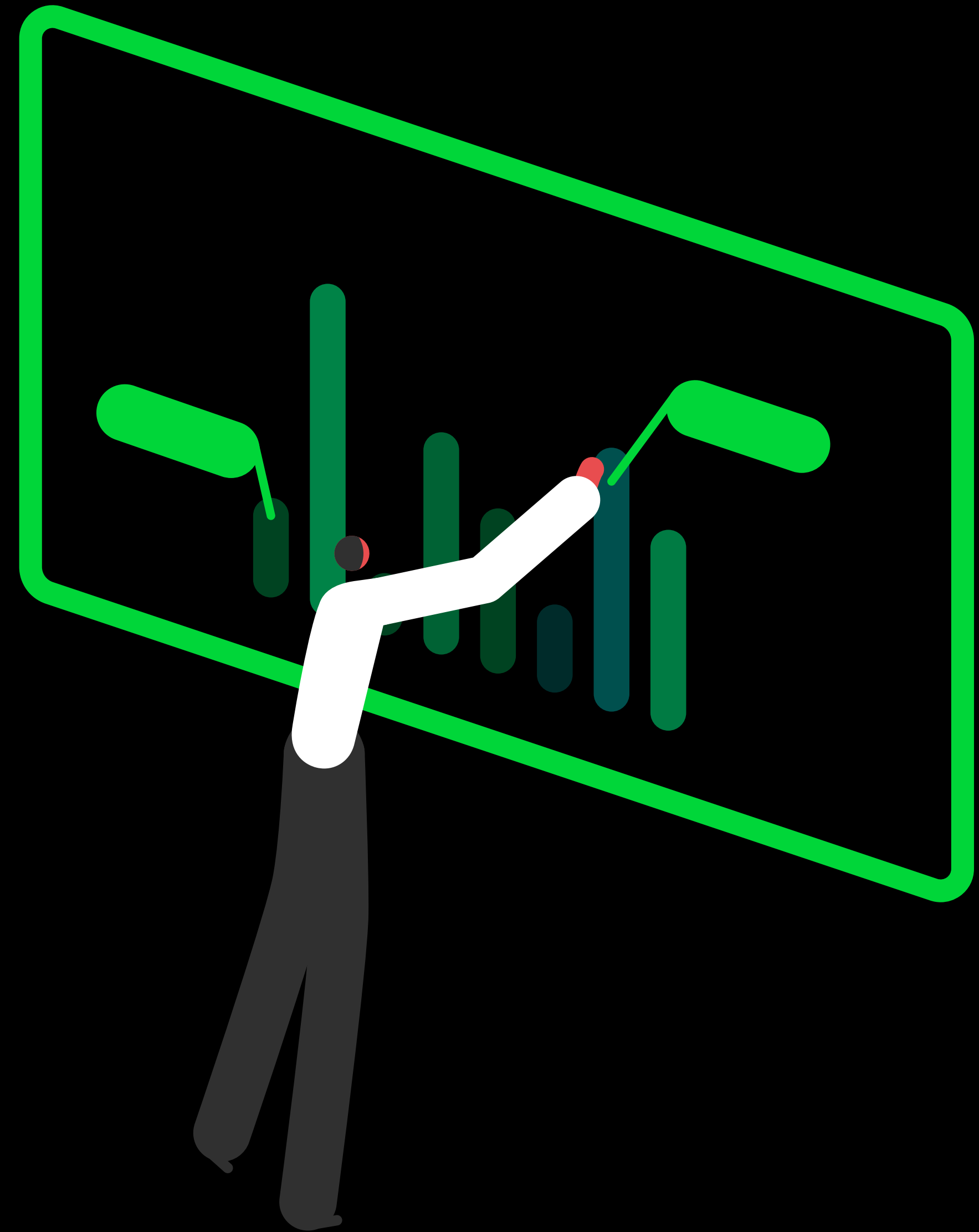
- Canada—17%
- France—17%
- UK—17%
- USA—17%
- Australia—8%
- Germany—8%
- South Africa—8%
- Spain—8%



Secret 1

Work beyond the budget—redefine your influence

Finance leaders are growing in areas outside traditional finance, including strategic decision-making and company-wide innovation.



The finance leader role: Expand your influence and navigate your evolving responsibilities

Traditionally anchored in daily finance and budget management, successful finance leaders now have broader, more strategic roles encompassing company-wide decision-making and innovation.

This evolution reflects a departure from conventional responsibilities, positioning finance leaders as central figures in future direction due to their insight into the business.



The pace of change in the business world has accelerated, compelling finance leaders to adapt swiftly. Our results reveal a landscape of rapid transformation, with 89% acknowledging a change in their role compared even to the previous year.

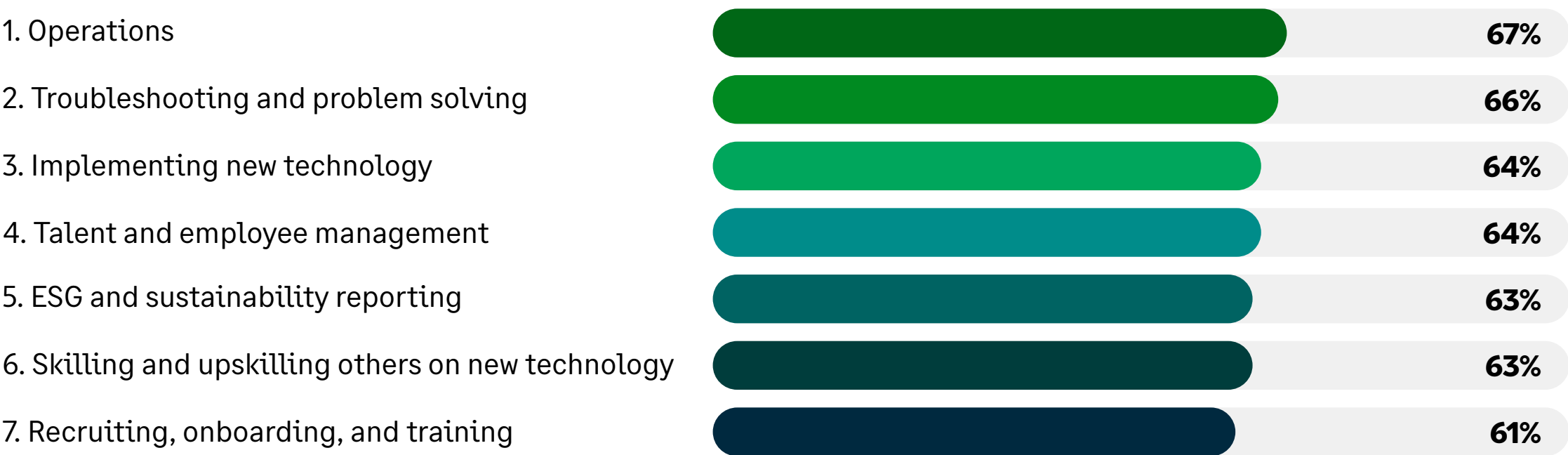
Furthermore, an overwhelming 96% of finance leaders anticipate that the role of finance within their organizations will undergo dramatic changes in the next 3 years.

Amid this evolving scenario, 80% express concerns about the future of their role, highlighting the need for agility and adaptability.

The way strategic and operational roles connect to solve challenges through the finance leader career is changing. This is partly because the tools and insight available have evolved as this role has expanded.

This graph demonstrates the breadth of responsibilities that finance leaders manage weekly, reflecting a role no longer confined to numbers.

Percentage of finance leaders who spend time on the following activities in a normal week



Percentage of finance leaders expecting to spend time on the following areas in the next 3 years*

More Same Less



*Percentages may not add up to 100% due to rounding

In today’s finance sector, a versatile skillset is crucial. Finance leaders who see themselves as successful prioritize problem-solving (79%) and leadership (78%), indicating the importance of these skills in navigating the complexities of finance.

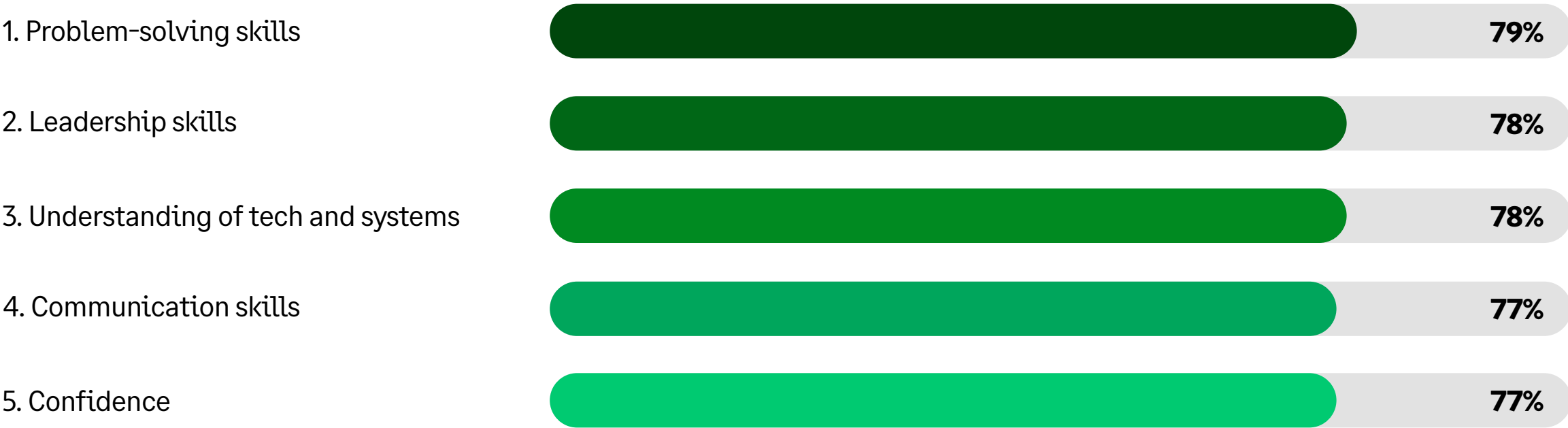
A deep understanding of technology and systems (78%), effective communication (77%), and robust confidence (77%) are also crucial.

These skills are especially prominent among the most successful finance leaders, who embrace continuous learning and adaptability as cornerstones for success.

To remain competitive, regularly assess your skills and seek growth through mentorship, new learning opportunities, and technology. This will ensure you continuously thrive and drive progress.

Top 5 attributes that are crucial to be successful over the next 3 years

Top skills listed by finance leaders who identify themselves to be successful



Top skills listed by all finance leaders



The data emphasizes that investing in operations management, problem-solving, and embracing new technologies are essential elements for the success of a modern finance leader.

This trend towards a broader influence scope mirrors the evolution within finance leader careers. With a considerable percentage dedicating time to talent management and employee development, successful finance leaders understand that nurturing human capital is now as integral as managing financial capital.

Moreover, as businesses commit to environmental, social, and governance (ESG) reporting, this signals a shift towards a more sustainable and ethically minded approach in finance leadership.

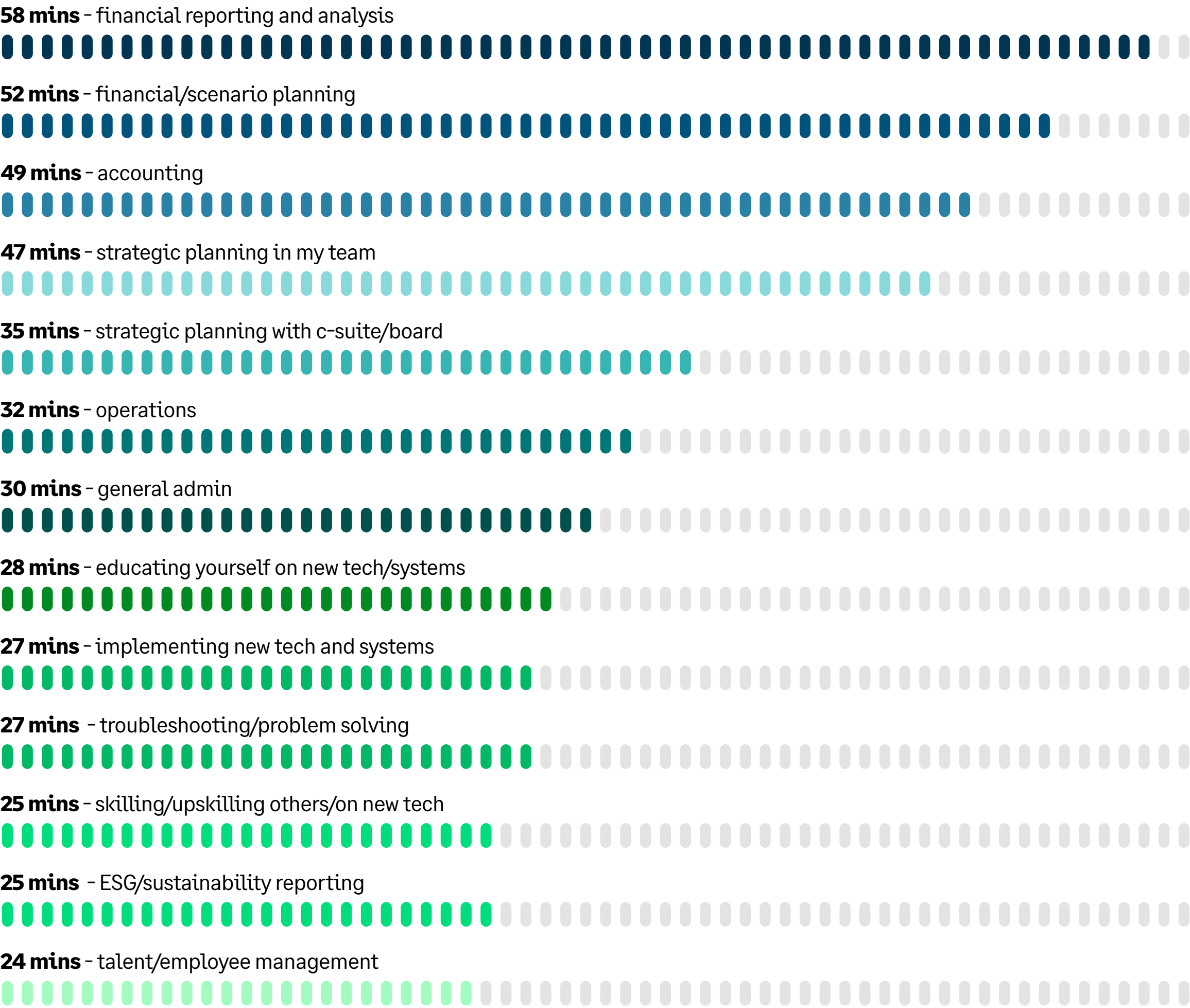
The future of the finance leader role is shaping up to be vastly different from its traditional archetype, with an ever-expanding horizon of influence that includes both people and technology.

4+ hrs

Over 4 hours a day are spent on tasks outside of traditional finance activities.

A day in the life of a finance leader

Average time spent on activities per day (in minutes)



Aside from a broader role, the daily life of a finance leader has also significantly diversified.

Far from being confined to their traditional financial tasks, for which they spend an average of 2 hours and 40 minutes daily, today's finance leaders now allocate substantial portions of their day to areas that reflect the evolving business landscape.

- Successful finance leaders dedicate around 1 hour and 20 minutes to technology-related activities and 1 hour and 22 minutes to strategic planning, on average.

The role has also grown to include aspects of general administration, operations, and troubleshooting, as well as ESG and sustainability reporting, and managing talent within the company.



2 hours 40 mins
spent on
financial tasks



1 hour 20 mins
spent on
technology



1 hour 22 mins
spent on
strategy



Expect more involvement with overall business strategy and counsel

Finance leaders are also poised to amplify their role in the broader business landscape, with 85% expecting to take on a more significant part in shaping strategy and providing counsel across their organizations.

This anticipated shift towards a more integrated approach to business leadership reflects the evolving expectations of finance chiefs.

- The majority, 60%, foresee a future where their insights will increasingly influence company-wide strategy.
- Meanwhile, 57% predict a surge in collaboration with other senior executives and board members, indicating a move towards a more cohesive leadership model.
- Furthermore, 56% of finance leaders are preparing for a heightened demand to offer broader business counsel, stepping outside the traditional financial domain.

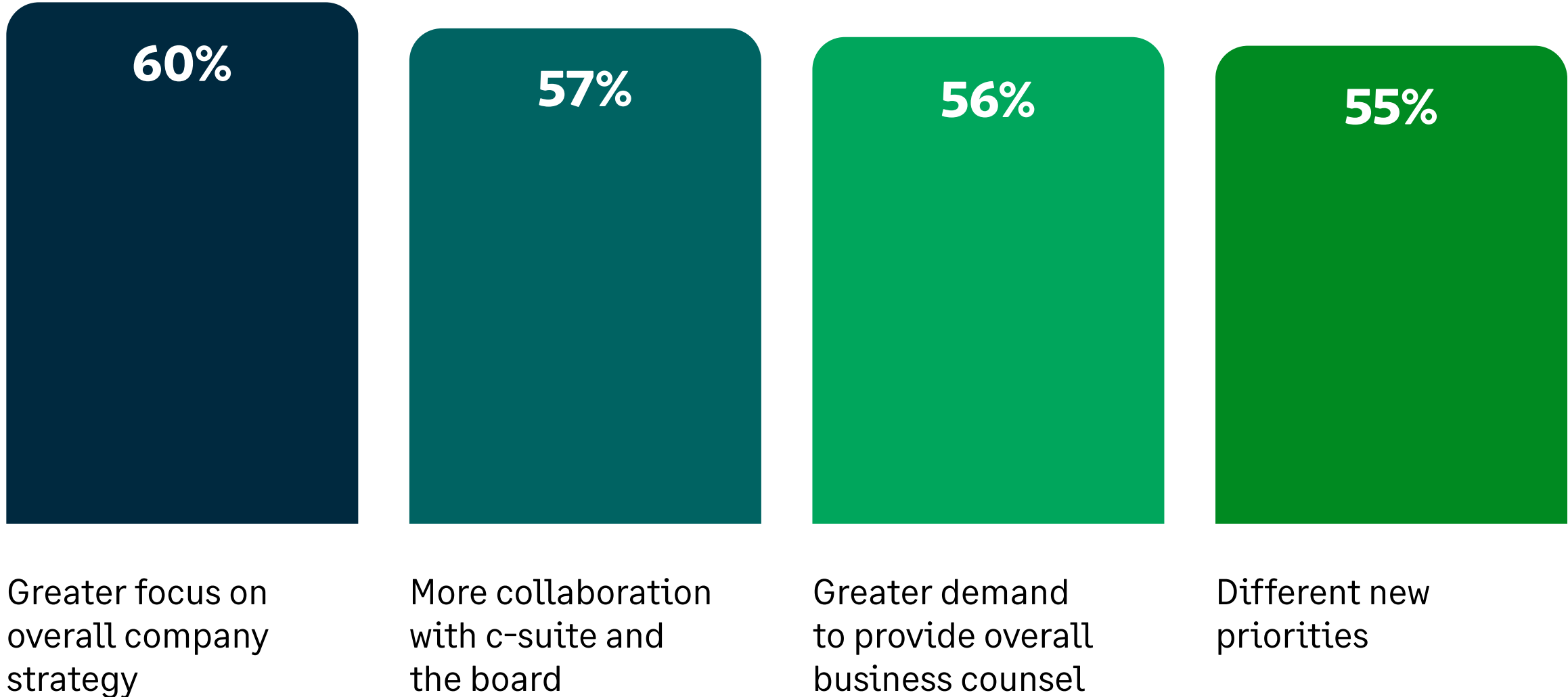
In an ever-evolving economic environment that calls for defensive and forward-thinking strategies, fostering cross-departmental collaboration to move quickly becomes vital to your success.

To maintain agility, your insight into resource allocation and financial foresight becomes business-critical when determining investment priorities and identifying areas for cost reduction.



of finance leaders believe they will become more involved in strategy and counsel for the overall business.

Percentage expecting the following changes to have major or significant impact on their role over the next 3 years



Expect your technology responsibilities and challenges to expand

The role of a successful finance leader now must keep up with and also drive the use of technology. Our survey found that over 80% of finance leaders anticipate dedicating more time to technological innovation, including implementing new systems, self-education on emerging tech, and upskilling their teams.



of our finance leaders expect to spend more time on new technology, whether it be implementation, educating themselves or teaching and upskilling others.

This commitment to technology is not a fleeting trend

- The finance leader's engagement with technology is expected to grow, with 61% preparing to invest more time in financial reporting and analysis and an equal percentage in financial and scenario planning—all leveraging technological advancements.
- Similarly, 61% of finance leaders plan to deepen their knowledge of new technology systems, signifying a proactive approach to technological fluency.

As you continue to harness technology, you'll gain access to deeper insights and more powerful analytical tools, positioning you as a strategic advisor who can guide your organization through complex landscapes with data-driven confidence.

This shift promises substantial benefits as you lead your teams into a future where technological expertise complements financial acumen.

As a result, you will have powerful tools and more insights at your disposal.

Technological versatility: The key to advancing finance

Integrating diverse technologies is as vital as developing varied skills for today's finance leaders.

A striking **86%** prioritize cybersecurity, **84%** have embraced cloud accounting and cloud computing, **79%** leverage big data analytics, and **75%** use data automation for forecasting, among other tools.

This technological diversification streamlines workflows and sharpens competitive edges.

Financial cloud management software could be pivotal in providing your business with a significant competitive advantage.

Such platforms empower decision-makers to execute informed, strategic actions by streamlining workflows and automating complex processes.

Key features like multi-dimensional reporting, real-time data access, and multi-entity consolidations are indispensable for dynamic financial oversight and management.

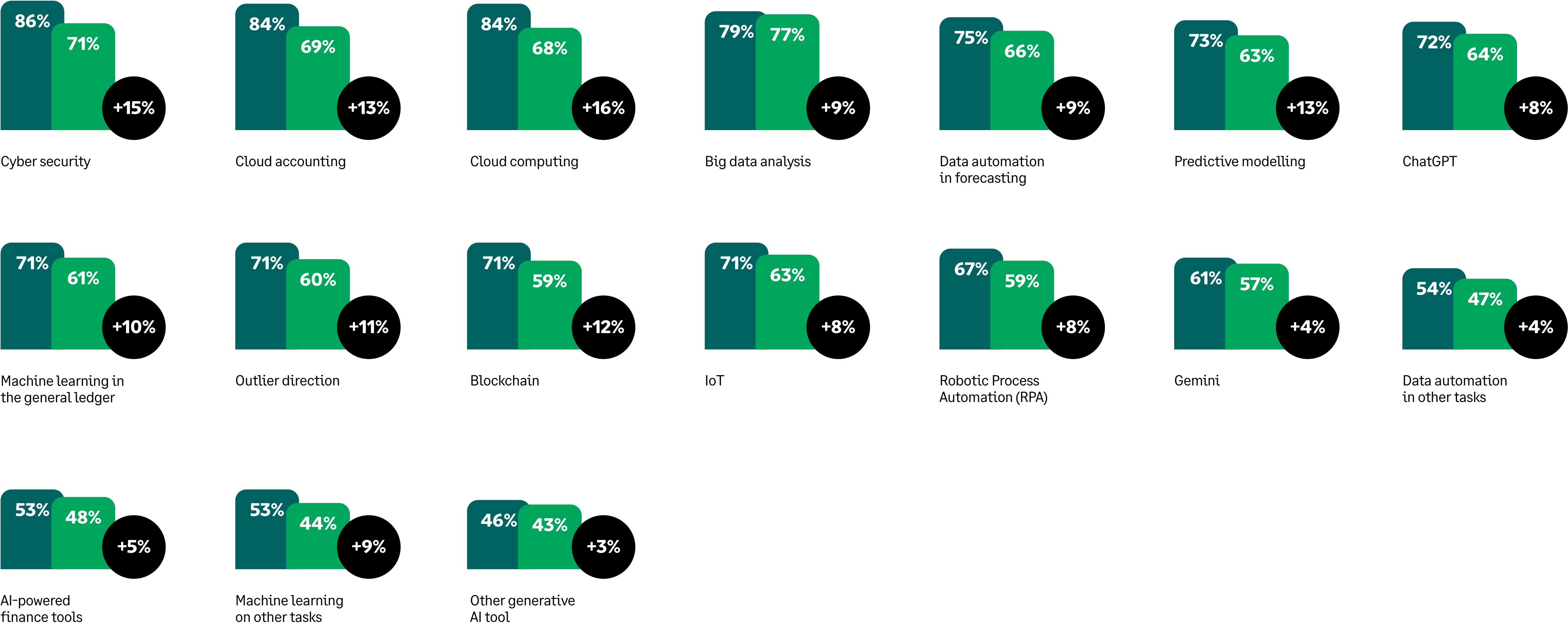
In addition, AI innovations like AP Automation and Outlier Detection can significantly enhance financial processes. These advancements transform financial management technology from automation tools into strategic partners supporting visionary leadership.

By adopting these solutions, your organization gains the technological agility necessary to adapt to changing market demands, ensuring that you remain at the forefront of financial innovation.



Percentage of finance leaders who say they use the following technologies in their current role

Very successful finance leaders Others

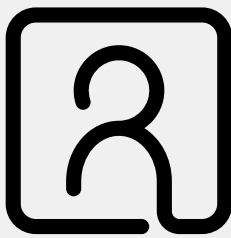


The expanding purview of the finance leader brings with it a suite

- At the forefront, 69% of finance leaders report that their primary challenge is managing an ever-increasing array of responsibilities.
- Close behind, with 68% of finance leaders pointing it out, is the integration of cutting-edge technology, including automation and AI, into their operations.

The finance leaders we surveyed look candidly into the issues that weigh heavily on their minds. Yet, within these challenges lies the potential for growth and innovation.

The complexity of today’s finance leader role tests your limits but offers you unprecedented opportunities to shape the future.



“With Sage, we can focus our resources on strategies rather than procedures. That’s a positive step for our shareholders, and it creates a better working environment for our employees.”

Ahmed Khan
Director of Finance, Global Food and Ingredients Inc.

7 of the top 10 biggest challenges for finance leaders are outside of the traditional role of finance

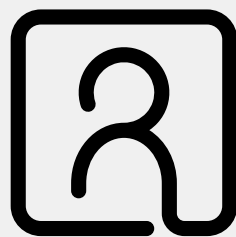
Juggling many responsibilities	69%	Time management	66%
Implementing new tech (e.g. automation, AI)	68%	Collaborating with other departments (e.g. HR, IT)	65%
Attracting and retaining talent	68%	Mergers and acquisitions	65%
Balancing the needs/priorities of diverse stakeholders	67%	Employee-related activities (e.g. talent management)	65%
Risk management	67%	Accurate and timely reporting	65%
Strategic responsibilities	66%	Collaborating with c-suite and the board	64%
Digital skills gap in my department or team	66%	Inefficiency of current financial toolkit	64%
Financial regulations	67%	External auditing	64%
Financial reporting and analysis	67%	Managing cash flow	64%
		Operations (e.g. ways of working)	63%

The collaborative future of finance leadership

The expanding role of finance leaders has increased the need for collaboration across various facets of the business.

- 60% of finance leaders foresee greater engagement with IT departments, underscoring the importance of digital transformation in finance.
- Similarly, engagement with ESG and sustainability initiatives is expected to rise for 58% of finance leaders, reflecting the growing importance of corporate responsibility in financial strategies.
- Collaboration will also extend to the executive tier, with 59% of finance leaders expecting more interaction with the finance leader and the board, while 57% predict closer work with CIOs and 55% with CTOs.
- Even interactions with departments like HR and sales are set to increase for 53% of finance leaders, illustrating the finance leader’s role as a cross-functional strategist.

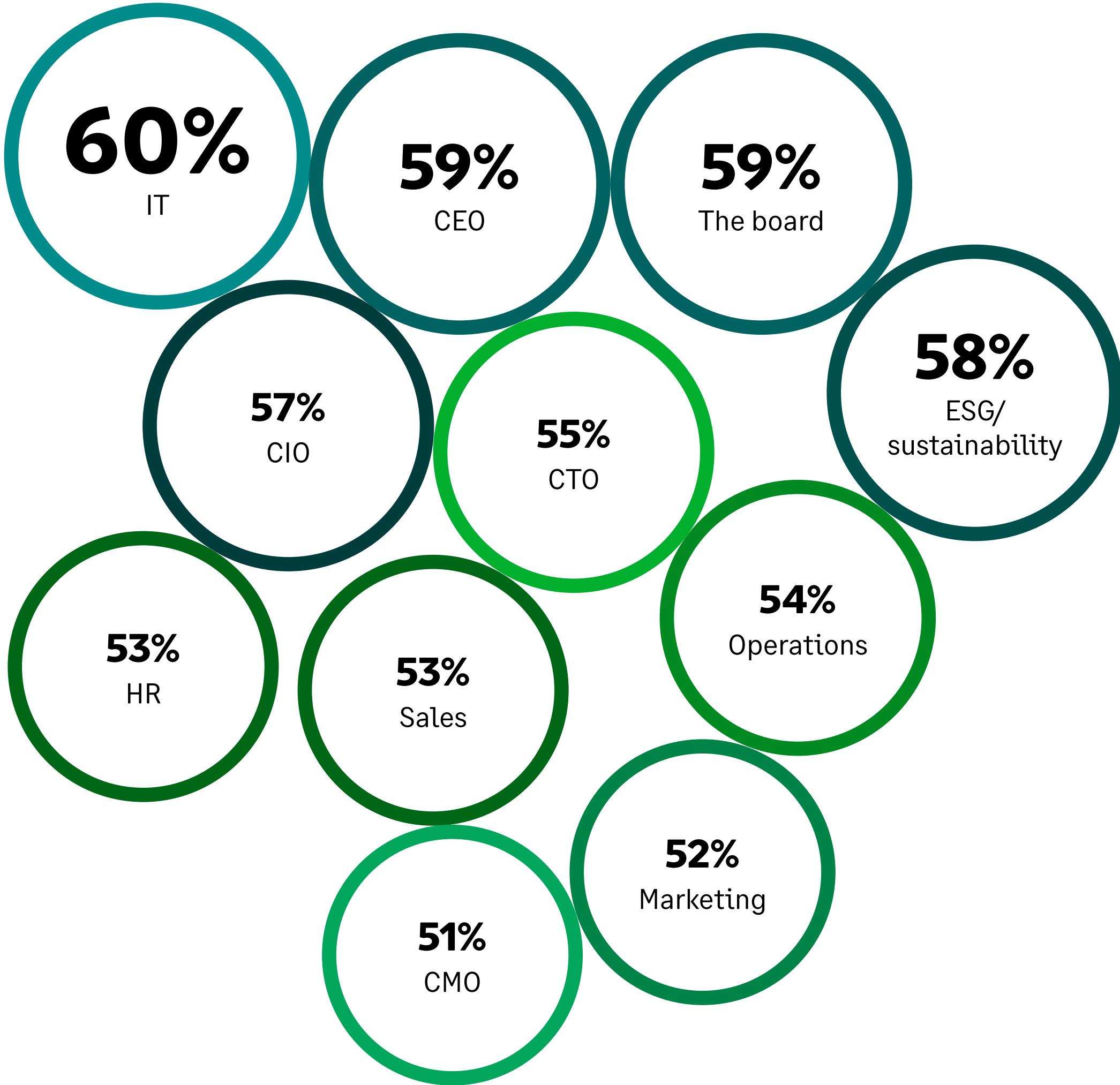
In this environment, data insights and automation efficiencies will help you become an indispensable advisor, trusted for your expertise across the company’s spectrum of operations.



“You’ve got to get them working together, showing them we can improve, that we can take on new things and solve new challenges as they arise.”

Gregory Billhardt
President & COO, American Cutting Edge

Percentage of finance leaders that expect to have more contact with the following departments or stakeholders



Make sure you dedicate time to your core craft

Ask yourself: as finance leaders increasingly wear multiple hats, does this breadth of responsibility dilute my expertise? Or, conversely, does it enrich my role, making me more integral to the business than ever before?

In answer, mastering core financial competencies remains paramount. To consider whether finance leaders are spreading themselves too thin across various tasks, you can look at the practices of the most successful finance leaders.

- Data reveals that 91% of these top-performing finance leaders prioritize financial reporting and analysis, indicating that despite their expanded roles, the essence of finance still lies at the heart of their daily activities.
- A very close 90% underscore the importance of financial and scenario planning, while 86% maintain that accounting skills are essential.

This commitment to foundational finance skills forms the bedrock of finance leader success, suggesting that being a “jack of all trades” does not necessarily prevent you from excelling in your core responsibilities.

Successful finance leaders integrate their daily competencies with diverse responsibilities, enhancing their effectiveness and strategic influence.

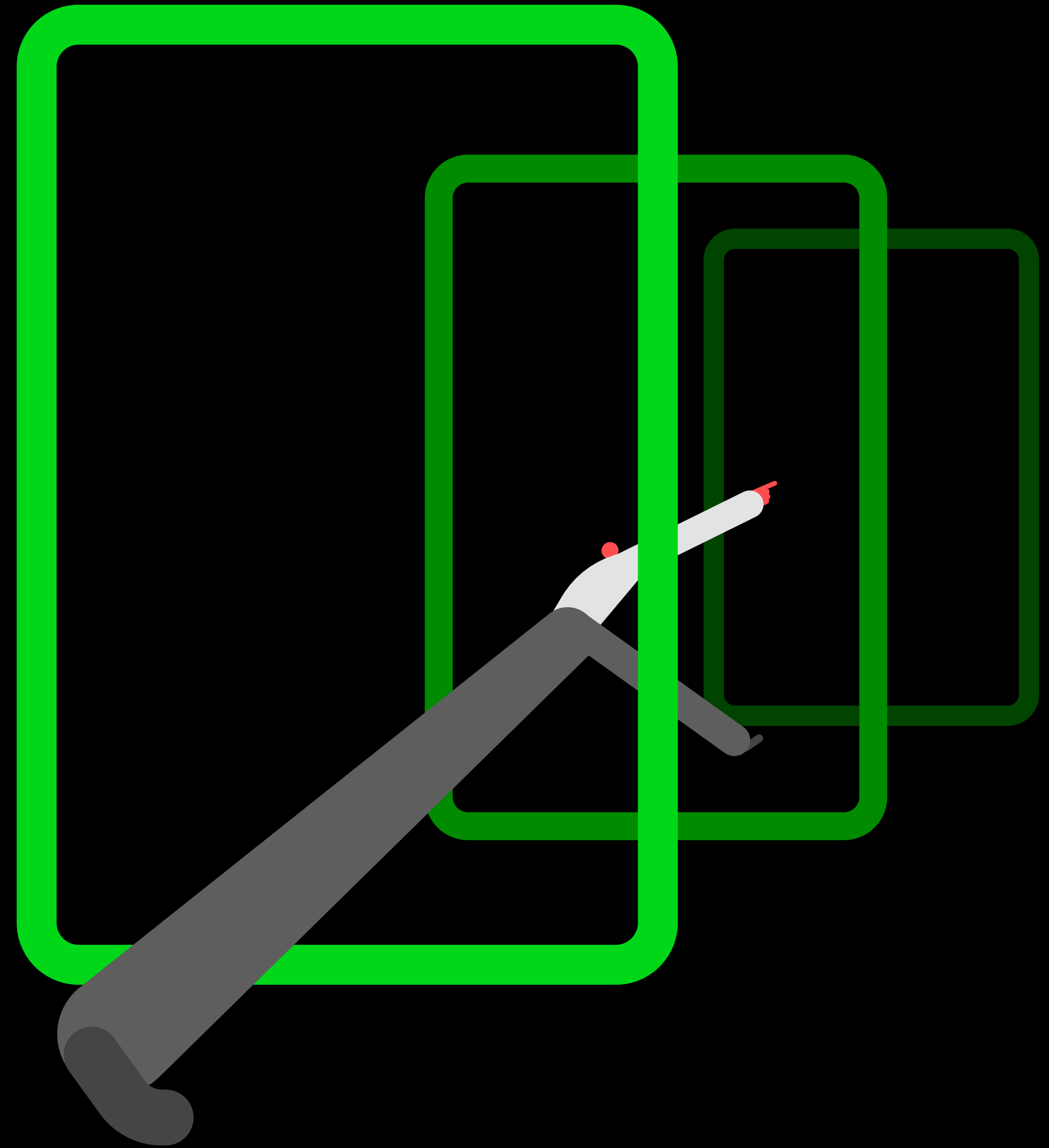
Percentage of finance leaders who spend time on the following activities in a normal week



Secret 2

Own the tech-finance fusion

Top finance leaders blend financial expertise with technological know-how, expanding their roles into strategic and technical domains for more significant impact.



Future-proofing finance: The imperative of technological proficiency

It's essential to build your tech knowledge base proactively. Staying ahead in the fast-paced world of finance requires a firm grasp of emerging technologies.

78% of highly successful finance leaders emphasize the importance of staying current with technological advancements, viewing it as critical for success in the coming 3 years.

The key to this success is to engage with technology vendors and industry analysts, who are often eager to share insights on the latest financial tools and trends.

This proactive approach to learning can provide a competitive edge, ensuring you are well-equipped to leverage new opportunities that technology brings to the finance sector.



**of our very successful finance
leaders identified keeping up with
new technology knowledge as crucial
to success over the next 3 years.**

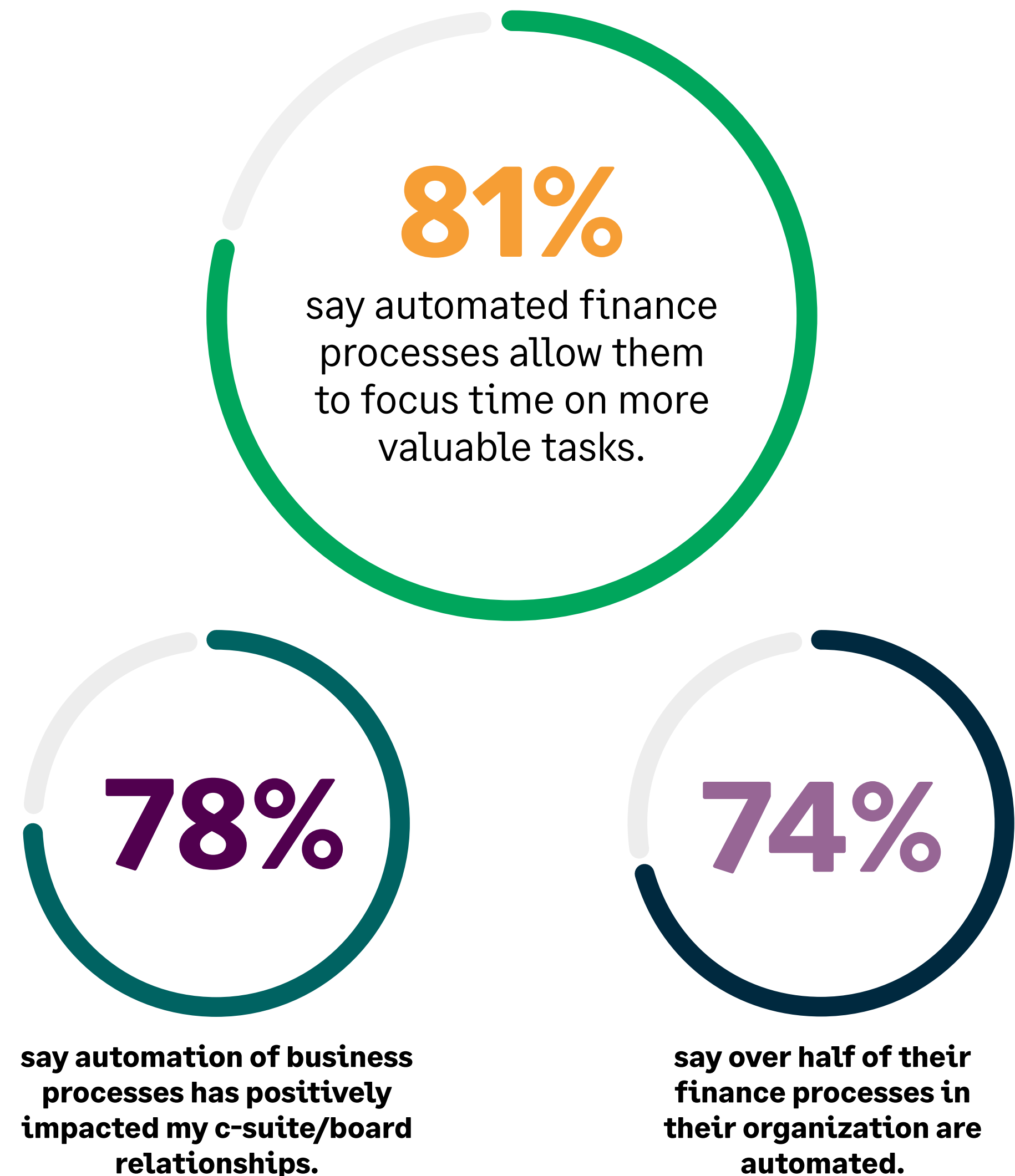


Brilliant strategy: Merge finance and data analytics for better decision-making

The transformative power of technology, specifically automation, has significantly reshaped the role of finance leaders, with 74% reporting that over half of their finance processes are now automated.

This technological shift is not just about efficiency; it empowers you to redirect your focus toward tasks that add excellent value to your organization.

- An impressive 81% of finance leaders acknowledge that automation frees them up for more strategic initiatives.
- Furthermore, the impact on executive dynamics is notable, with 78% observing a positive effect on their interactions with other c-suite members and board directors.
- The appetite for progress is clear: 81% of finance leaders believe there is room for increasing automation to drive further efficiency gains.



Stay ahead of the curve: Navigate emerging technologies

A resounding 79% of finance leaders believe AI has the potential to revolutionize their organization's workflows. To stay ahead, 78% acknowledge that implementing AI in finance is not optional but necessary to maintain a competitive edge.

- The impact on the bottom line is clear, with another 79% predicting AI will bolster revenue growth.
- The benefits extend beyond the balance sheet; 77% of finance leaders anticipate AI will enhance job satisfaction within the finance function.

Yet, despite the recognized value of AI, there's a disparity in its adoption for finance-specific tasks—while 86% of organizations have embraced AI, **only 51% have used AI-powered finance tools.**

This gap represents a significant opportunity: half of the finance leaders are not yet using AI tools to their full potential. Adopting these tools could maximize efficiencies and position your teams at the forefront of the financial industry's AI-driven future.



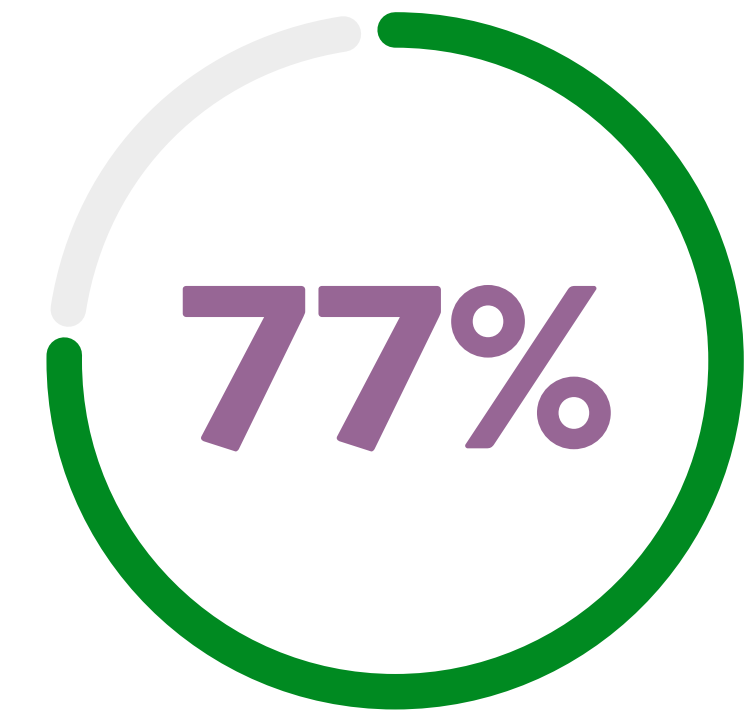
**say AI has the ability
to revolutionize
ways of working in
their organization.**



**say implementing AI in
finance is crucial for
organizations to
stay competitive.**



**say they believe the use
of AI in finance will
improve revenue growth
in their organization.**



**say the investment in AI
finance will help improve
job satisfaction.**

Bridge the metrics gap: From insight to action

The journey from recognizing the importance of metrics to actively tracking them reveals a notable gap among finance leaders—a gap technology, like automation and AI, can help bridge.

- While a substantial majority (86%) understand the significance of metrics, only 45% are collecting them, indicating an area ripe for technological enhancement.
- Priorities are clear with financial reporting and the satisfaction of customers and employees (91%) at the forefront, closely followed by customer retention (90%).

The divergence is most pronounced in ESG and sustainability metrics.

Even though these are deemed necessary by 68% of finance leaders, there's a lag in their tracking, underscoring an opportunity to use technology to collect these metrics and translate them into strategic insights and competitive advantages.

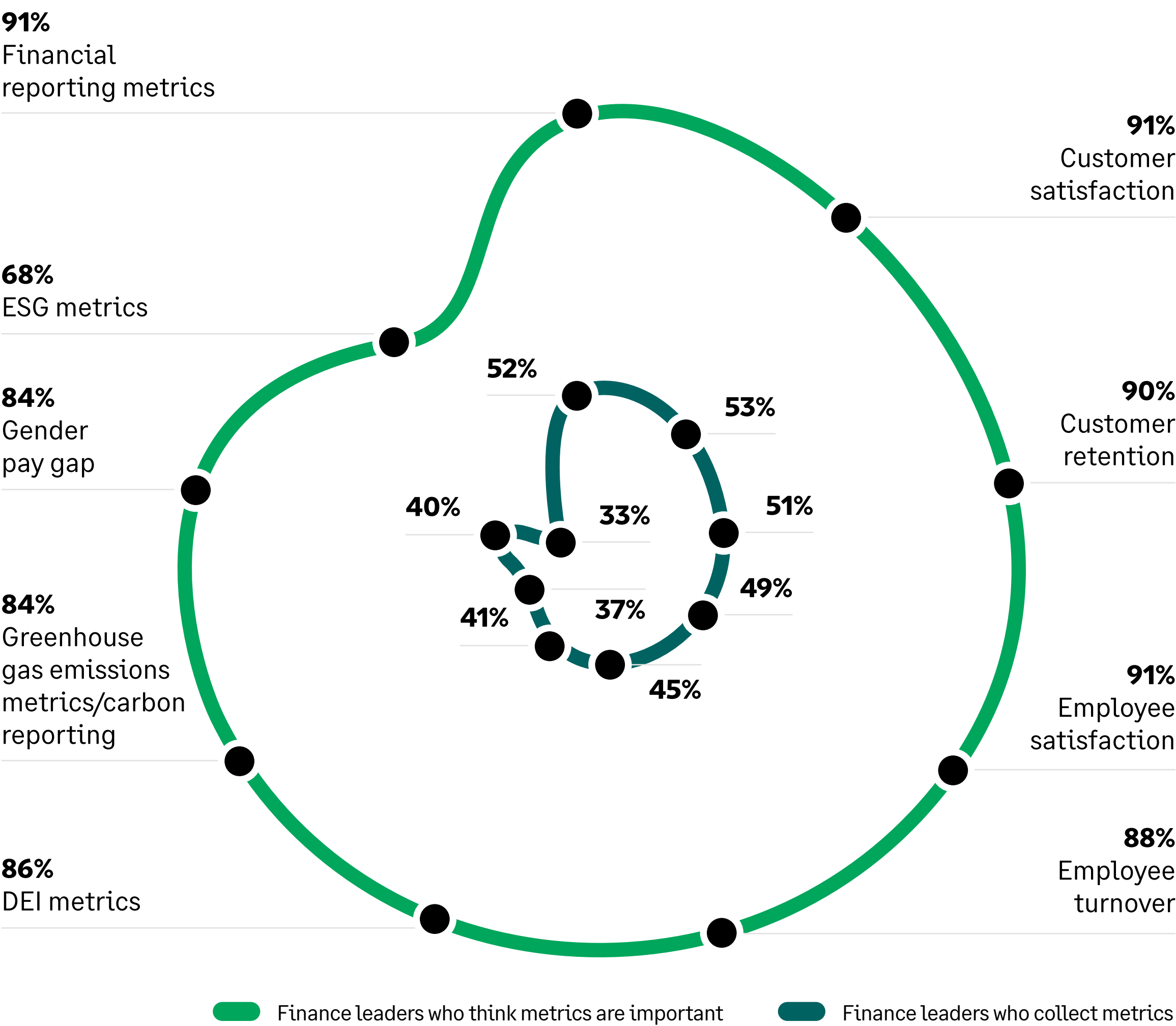
86%

understand the significance of metrics

45%

collect metrics

The number of finance leaders thinking metrics are important, versus the number of finance leaders actually collecting these metrics



Unleash your finance team's potential— AI, automation, and maximum impact

The correlation between technology adoption and perceived success in finance is undeniable.

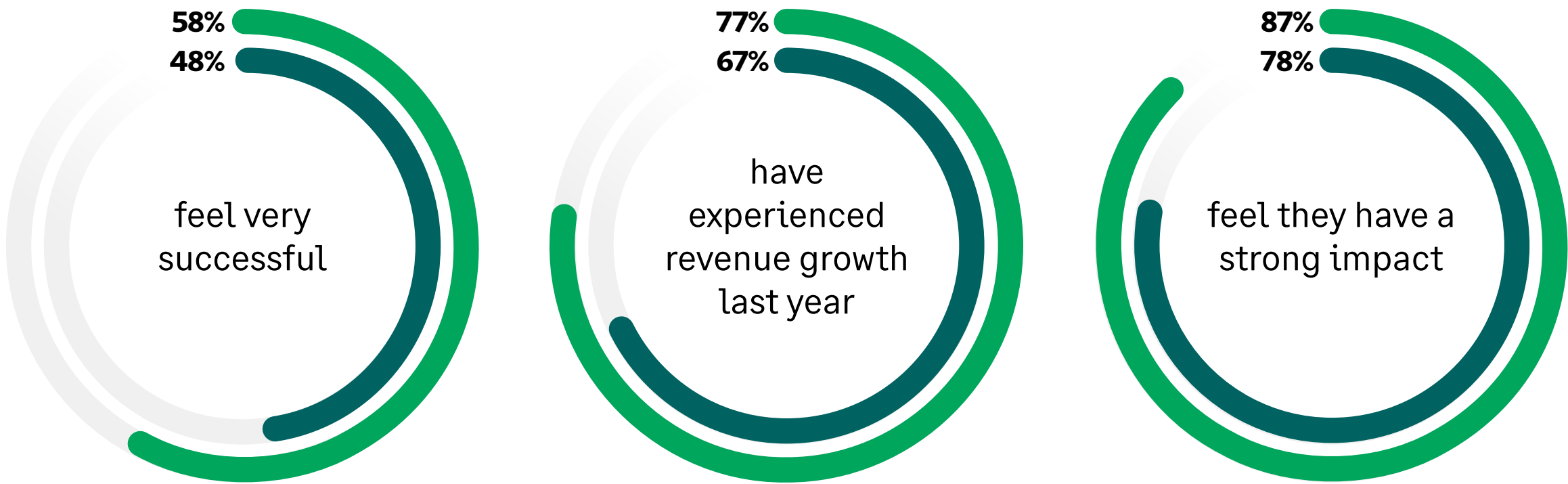
- Our findings reveal a compelling trend: 87% of finance leaders who have incorporated AI into their roles report a significant impact on their businesses.
- This sentiment is echoed in machine learning, with 88% of those employing this technology also feeling a strong influence on business outcomes.

The embrace of new technology is widespread among finance leaders, with high adoption rates across various platforms.

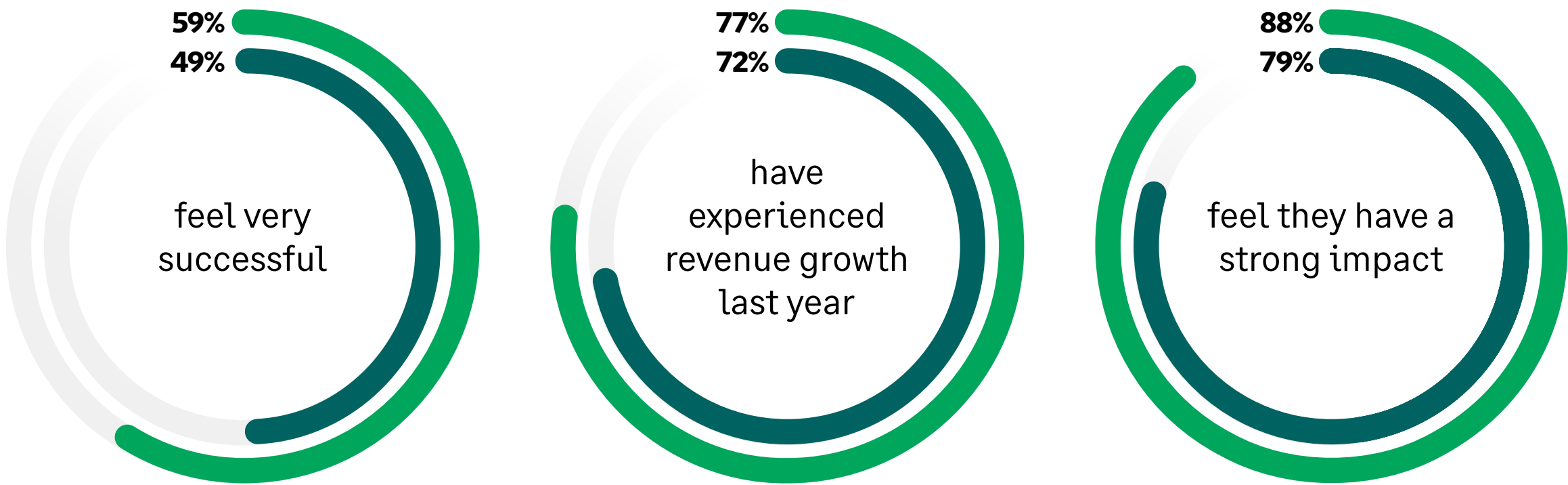
- 88% have adopted cloud technologies, 86% are using automation, and 77% have implemented machine learning.

These tools are not just about keeping pace with the digital transformation; they are about you leading it.

Those who currently use AI in their roles are more likely to...



Those who currently use machine learning in their roles are more likely to...



Fi- Finance leaders

Tech-savvy leadership: Gain an edge in finance

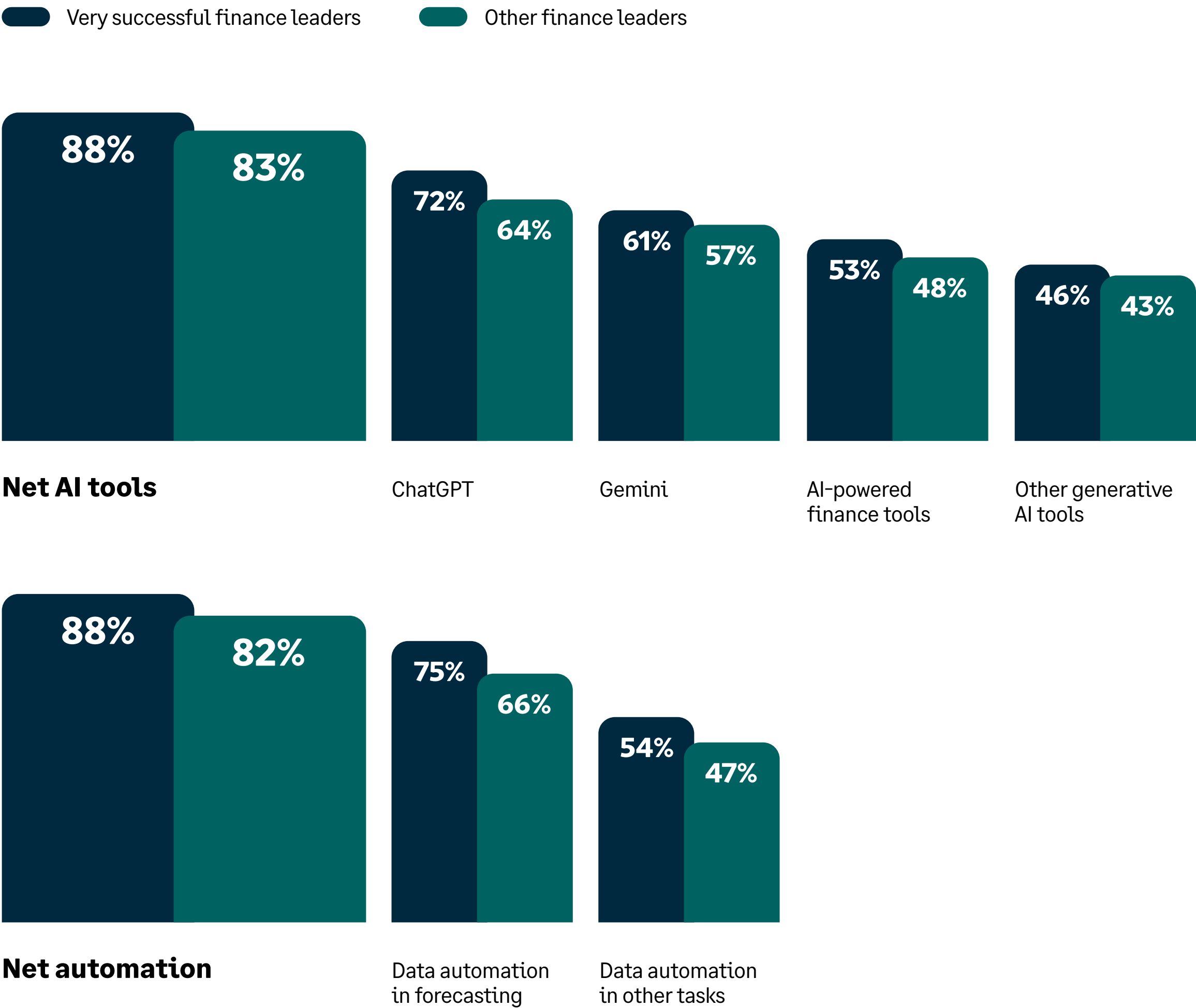
The data is clear: the most accomplished finance leaders are those who fully embrace AI and automation within their roles.

- A notable 88% of these very successful finance leaders use AI and automation tools, surpassing the 83% of their peers who do the same.
- This trend is even more evident when looking at the adoption rates for tools like ChatGPT, leading to AI tool usage among very successful finance leaders.

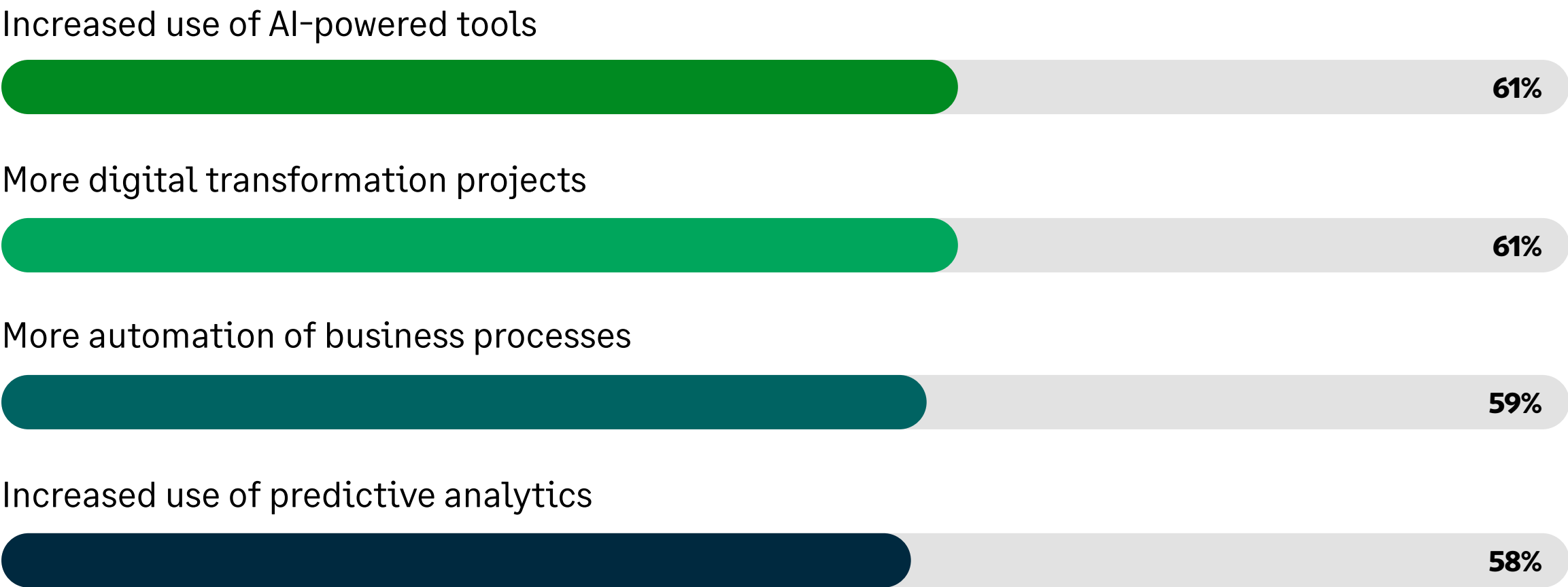
These technologies are not just about streamlining existing processes; they help forge new paths. Generative AI, for instance, provides novel ways for you to allocate resources more effectively and uncover hidden revenue opportunities.

By harnessing the power of generative AI to delve deeper into business data, very successful finance leaders reveal insights that might have remained undiscovered, driving strategic decisions that keep their organizations at the vanguard of the financial sector. Make AI part of your toolkit to ensure the same success.

Percentage who say they use the following technologies in their current role



Percentage expecting the following changes to have major or significant impact on their role over the next 3 years



Most finance leaders, 86% to be precise, predict that technology will significantly change their roles, primarily through AI, machine learning, and automation—these are frontiers of opportunity.

- With 61% expecting an increased use of AI-powered tools and an equal number looking forward to more digital transformation projects, the finance domain is on the brink of significant evolution.
- Nearly 60% foresee more automation of business processes, while 58% are gearing up for a greater reliance on predictive analytics.

These technologies promise to redefine the finance landscape, turning it into a strategic powerhouse that goes beyond numbers, offering insights and driving your business forward.

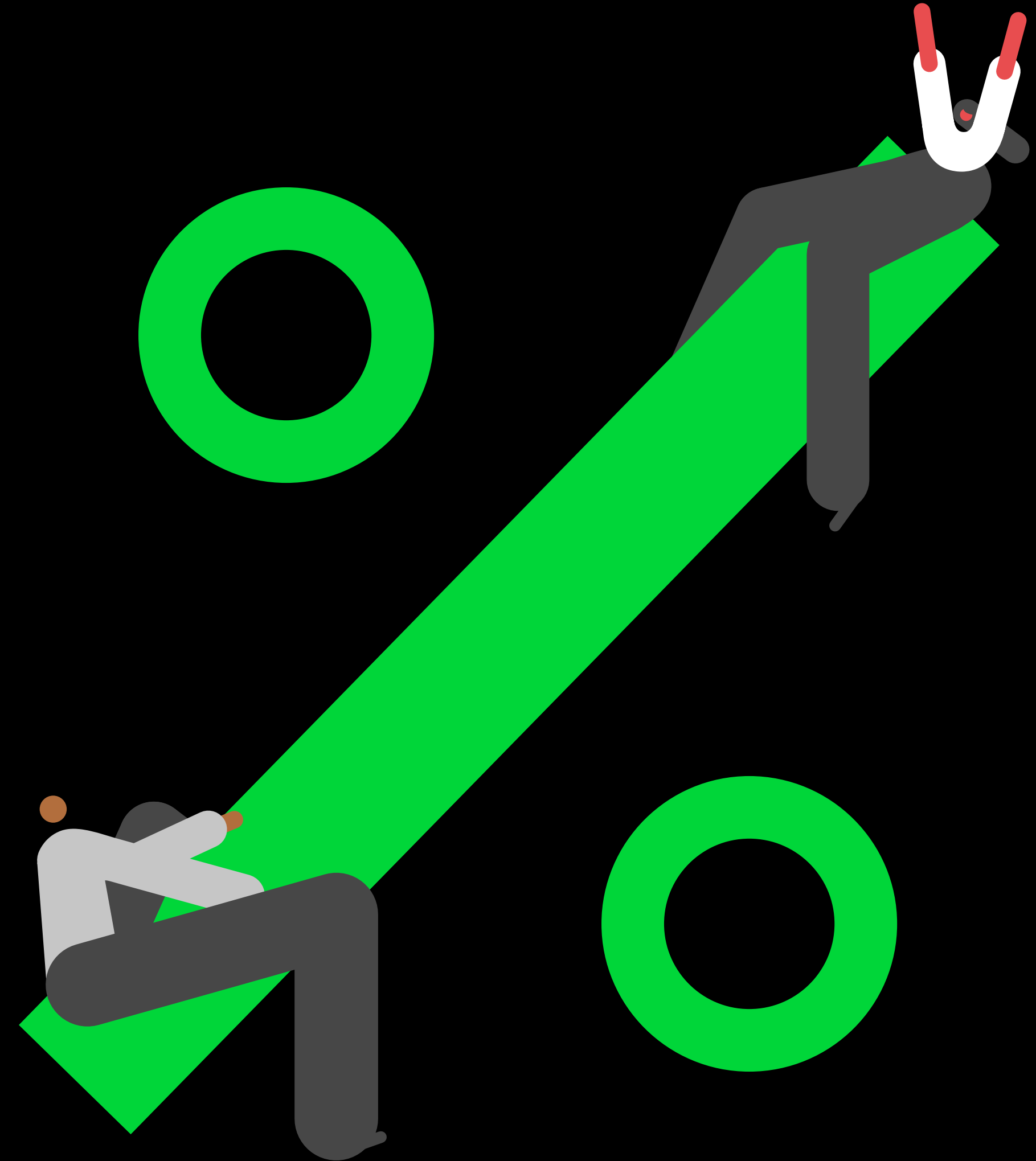


of finance leaders think tech will have a major impact in their role in the future, with AI, machine learning, and automation cited as the biggest opportunities.

Secret 3

Balance the ledger of life—manage success and sacrifice

Successful finance leaders manage the crucial balance between professional success and personal well-being.



Strategies for healthier work-life integration

The issue of stress and burnout among finance leaders is strikingly prevalent, with our research indicating that 87% of finance leaders experience regular stress, and 83% report burnout.

This highlights the intense pressure and demanding nature of their roles in today’s fast-paced business environment.

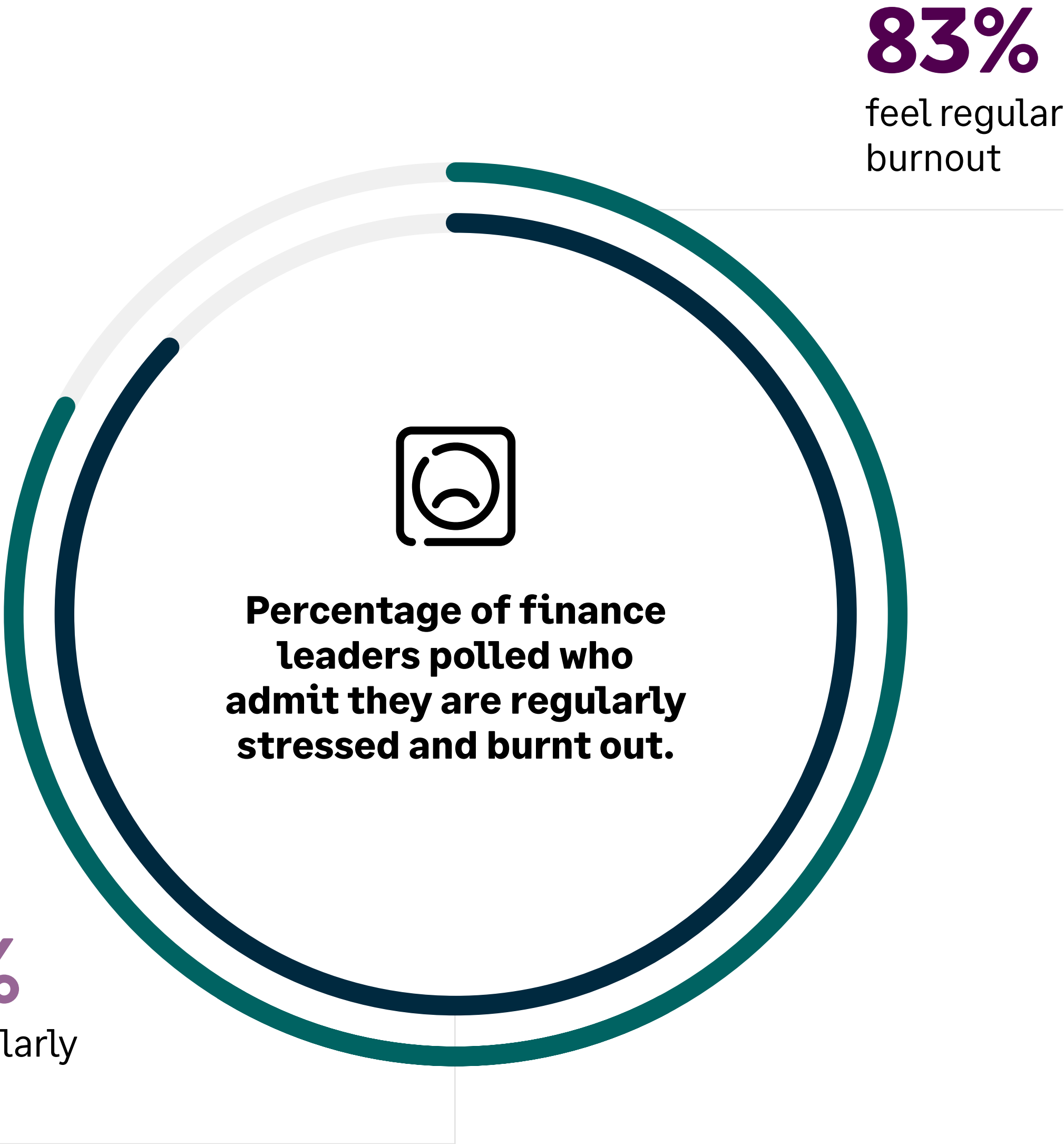
Moreover, the challenge of maintaining a work-life balance is evident, as only about 33% of finance leaders believe that achieving this balance is feasible in their current position.

These statistics underscore a critical need for organizations to foster a supportive environment that prioritizes the well-being of their finance leaders, potentially through flexible work arrangements, wellness programs, and the delegation of responsibilities.

As finance leader, you can help to influence this change toward a human approach to people management.



Only 1 in 3 believe it is very easy to achieve a healthy work-life balance (35%).



The quest for equilibrium: Success versus balance in finance

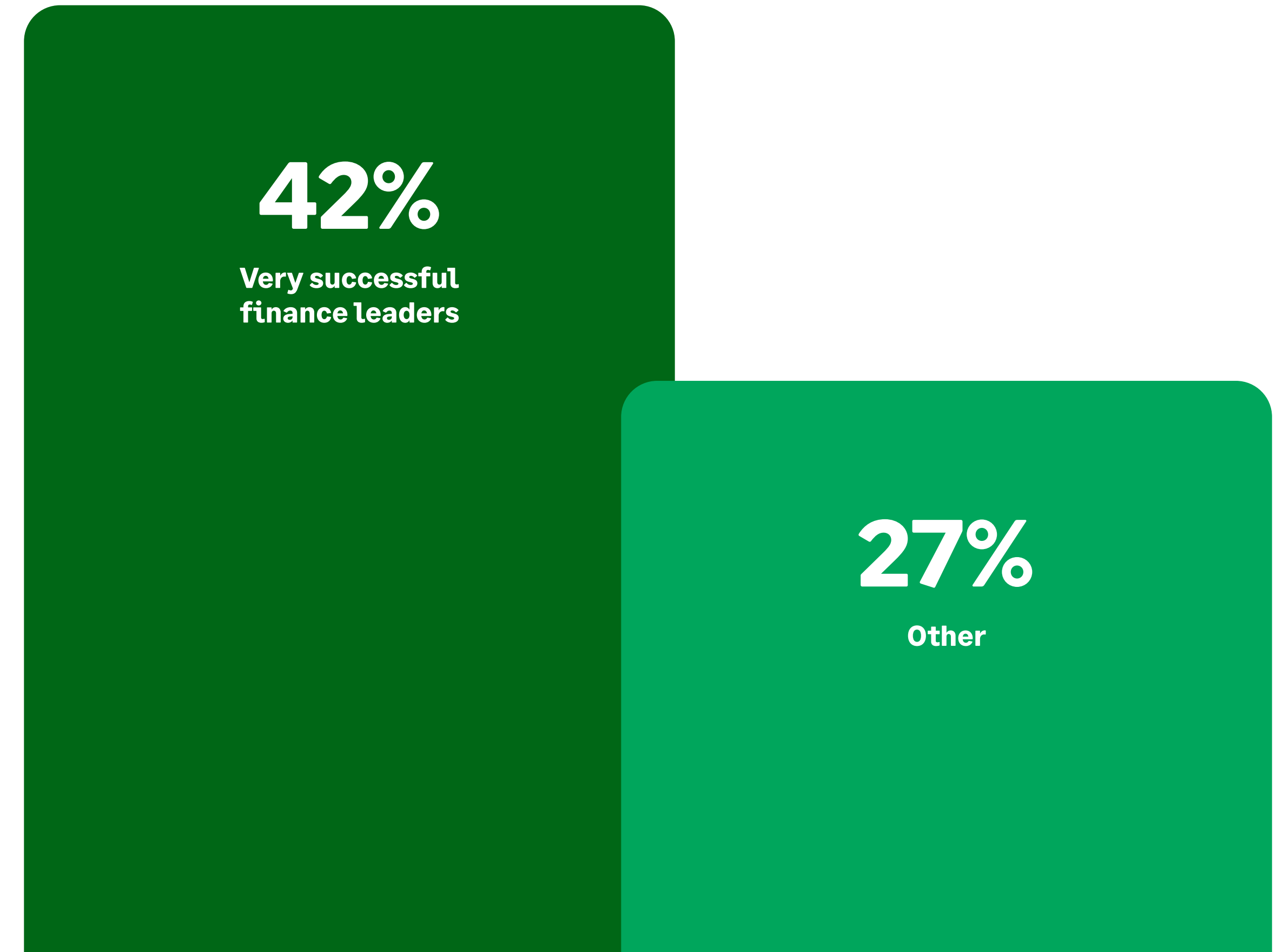
In finance, achieving a work-life balance can often seem like a distant goal. However, our research reveals a notable difference in perceptions of this balance between varying levels of success among finance leaders.

Interestingly, very successful finance leaders report a significantly higher capability of balancing work and personal life—42% of these leaders find it very easy, compared to just 27% of other finance professionals.

This disparity suggests that those at the higher echelons of success may have better access to resources and support systems or more autonomy to manage their schedules effectively.

It also points to the importance of strategic time management and prioritization, skills that may naturally correlate with higher success and a better balance. Leverage this to find your work-life equilibrium.

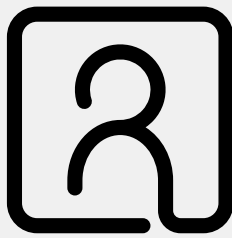
Percentage of finance leaders who say it's very easy to attain a healthy work-life balance



This positive outlook is a testament to their ability to navigate and thrive amid the challenges of modern business pressures.

The correlation between this satisfaction and the previously noted ability of very successful finance leaders to maintain a healthy work-life balance is undeniable.

The ability to manage professional success and personal well-being is desirable and attainable, as evidenced by the higher reported rates of ease in achieving work-life balance among the most successful finance leaders. Make time management, agility, and resilience critical in your attitude, which will help you succeed in your role, business, and at home.



“With Sage, we stay out in front. I never feel like we’re playing catch-up. We have continuous access to the data we need to run the business in the most efficient, safe, and profitable way possible.”

Jacques Plante
CIO and Finance leader, MLW Foods



Ambition and ability: Harmonize your drive and skillset

Ambition is a defining trait of successful finance leaders, with 72% showing a higher drive than their peers.

Their ambition fuels personal and company success, contributing to job satisfaction and a balanced life.

These leaders strategically align their career goals with their company's direction, understanding that personal growth and organizational success complement each other.

This synergy encourages them to adopt innovative tools and strategies, striving for excellence in their roles while fostering company growth. It will help you harmonize your role with the business need, giving you a valuable skillset as your role expands.

Percentage of finance leaders who say they are very ambitious



Very successful finance leaders

72%



Other

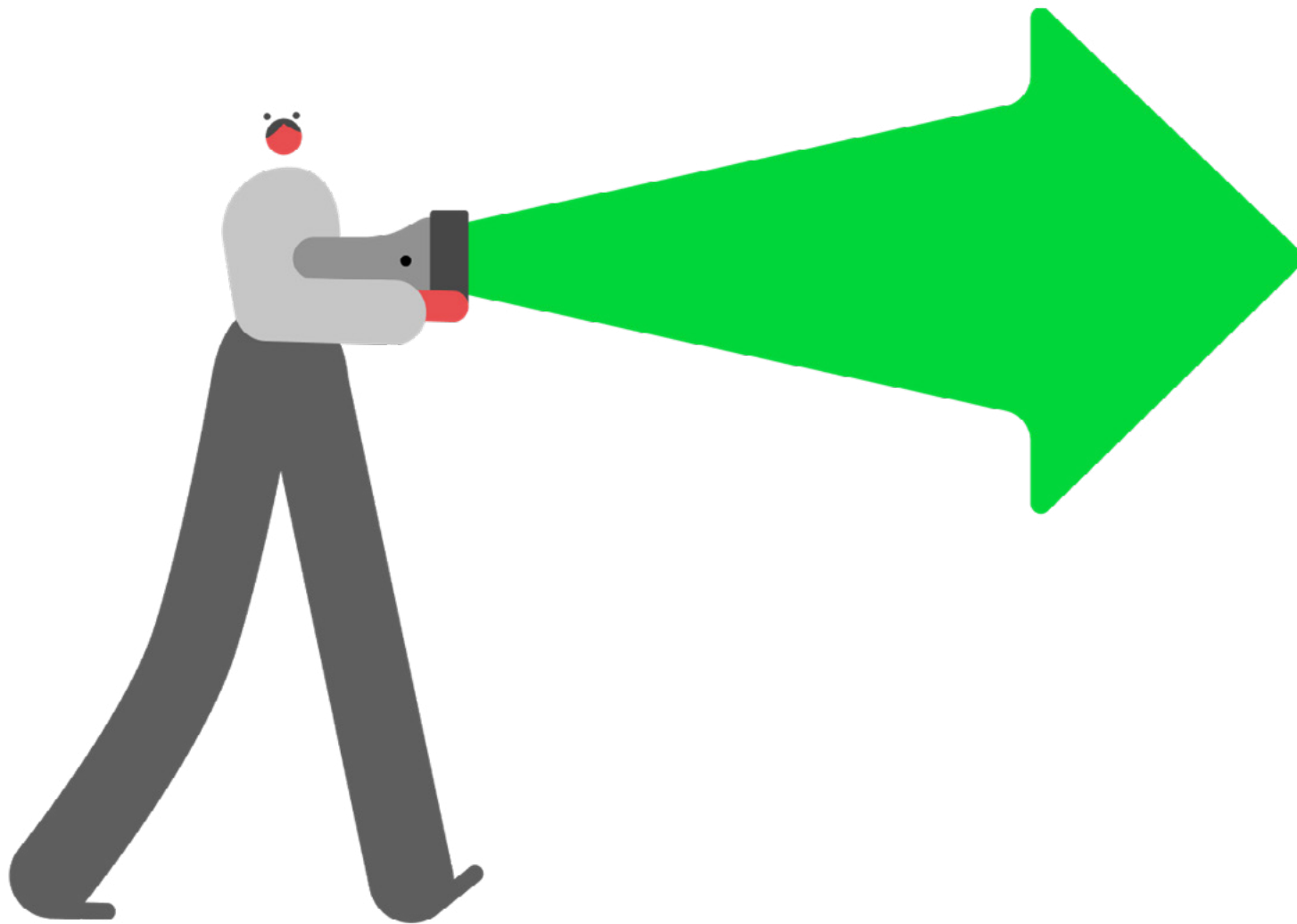
42%



of finance leaders are motivated by the success of the company.

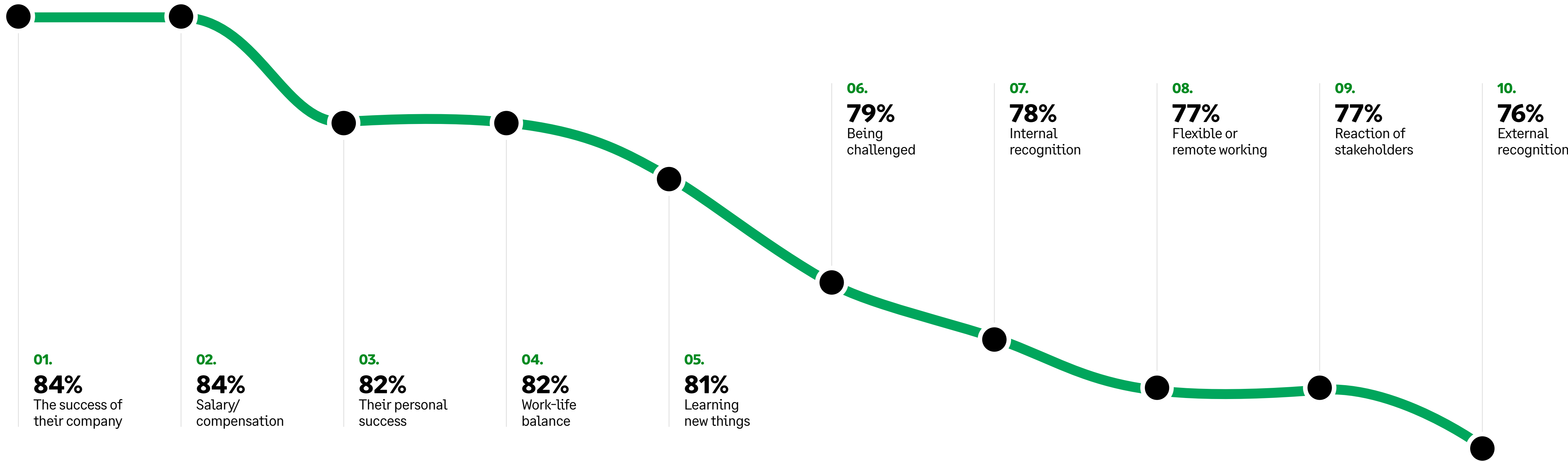


of finance leaders are motivated by their own personal career success.



Motivating factors are diverse and cover both personal and professional

Percentage of finance leaders who are heavily motivated by the following areas



Aspiring to leadership: The path from finance leader to CEO


Finance leaders are setting their career goals high, with 40% of directors of FP&A targeting the CEO role, showcasing a solid alignment with strategic leadership. Likewise, 27% of finance professionals aspire to become CEOs, indicating ambition across the board with no gender disparity.

Percentage saying the following is their career end-goal



...and women match men

*Director of FF&P tend to work more on strategic tasks in their roles, so this difference may be due to them already taking on responsibilities they see as aligned with those of a CEO.

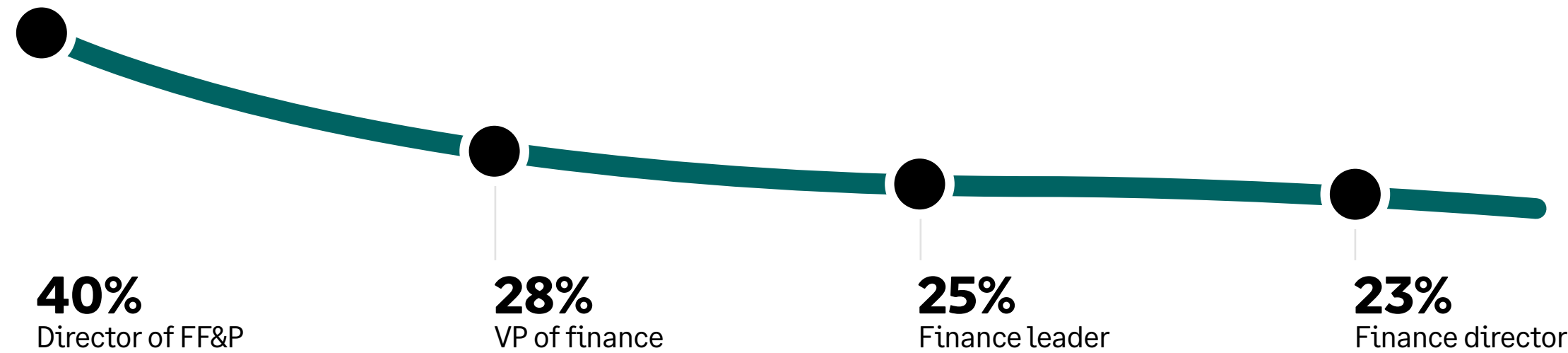


Over 1 in 4 women aim to become a CEO (27%).
- matching men's ambitions

This widespread ambition among finance professionals suggests a readiness to expand their skill sets, use new technologies, and challenge the status quo, which is crucial for those aiming for the CEO position or entrepreneurship.

Ensuring you have the sharpest strategic mindset as the finance sector evolves will position you to lead the change.

Percentage of finance leaders that say becoming a CEO is their career end-goal



A vast majority, 95%, are ambitious, and 59% feel very ambitious, indicating a potent drive for growth and leadership.*



95%
of finance leaders feel ambitious



59%
of finance leaders feel very ambitious

Conclusion

The 3 frontiers of finance leadership highlight the essential competencies and visionary approaches necessary for today's finance leaders to excel.



Beyond the budget: success for finance leaders now entails expanding their influence beyond traditional finance roles, embracing strategic decision-making, and fostering innovation across the organization.



Tech-finance fusion: embracing technology, including automation, outlier detection, and AI, is crucial. This integration is about improving efficiency and positioning finance leaders as strategic advisors who use data for insightful decision-making.



Work-life balance: finally, the challenge of balancing professional success with personal well-being remains paramount. Achieving this balance is essential for sustainable leadership and organizational health.



As we look forward, the role of finance leaders will continue to evolve amid rapid technological advancements, global economic complexities, and increasing expectations for sustainable and ethical leadership. Adaptability, continuous learning, and strategic foresight will be critical for you to lead your organizations through these dynamic times.

Technology continues to reshape the finance leader's role, allowing you to make astute, faster, well-informed, and forward-looking decisions. This pivotal transformation gives you a competitive edge for sustained growth and scalability. In your newly defined role, use technological breakthroughs like AI and machine learning, as well as your skills, to lead your organization toward strategic growth, innovation, and resilience. The journey ahead is complex, yet the opportunities are boundless if you're brave enough to face the future head-on.

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About Equation Technologies



Equation Technologies provides business management solutions for mid-sized companies in the USA and Canada. We make carefully crafted recommendations from among the industry's best-performing ERP software, including Sage Intacct and Sage 300. We help you reduce the risk in choosing and implementing solutions by:

- Listening closely to your challenges and exactly how your business works.
- Developing processes that match your business, not requiring you to conform to a software system.
- Mapping out efficiencies using technology to improve operations without adding staff.

Our main goal is simple: have a clear understanding of our clients' goals. We believe the only way to sufficiently grasp that information is by listening first, and offering valuable advice later. We also know that one single approach is not right for all businesses. We leverage our team's vast education and business experiences across industries to focus on our clients' unique needs. We understand the importance of your business. We know when you call on us, time is of the essence and we value & respect your time.

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