SAGE INTACCT PARTNER MIGRATION GUIDE

Right Software, Right Partner

Sage Business Partner

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Introduction

The idea of introducing ERP (Enterprise Resource Planning) & financial management software to your company was to help you manage your entire business operations, fundamentally what ERP is meant to do for you. But you might be feeling you made the wrong software decision if you are not achieving what you set out to. What if it's not the software – maybe your implementation and support partner wasn't and isn't the right partner for your company?

You've invested lots of time and money in Sage Intacct, so you cannot just scrap it and buy something new. Perhaps it's time to look at a new Sage Intacct partner.

In this document we will be highlighting some of the reasons why businesses change partners, what you need to consider when you decide to move your support, what to look for in a new partner, and you've guessed it, why you should seriously consider Acuity!

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The importance of having a strong and reliable Sage Partner

Let's face it, the investment in new software isn't cheap but with effective use you can achieve a responsibly quick return on investment. However, that depends on whether you are working with the right Sage Partner.

When investing such a large amount of your well-earned revenue to buy a new solution, you want to be certain you are buying from a partner who not only knows their way around Sage Intacct but has plenty of experience implementing the software. Additionally, you want to be assured the partner understands your business and your goals and they are genuinely interested in helping you to achieve them.
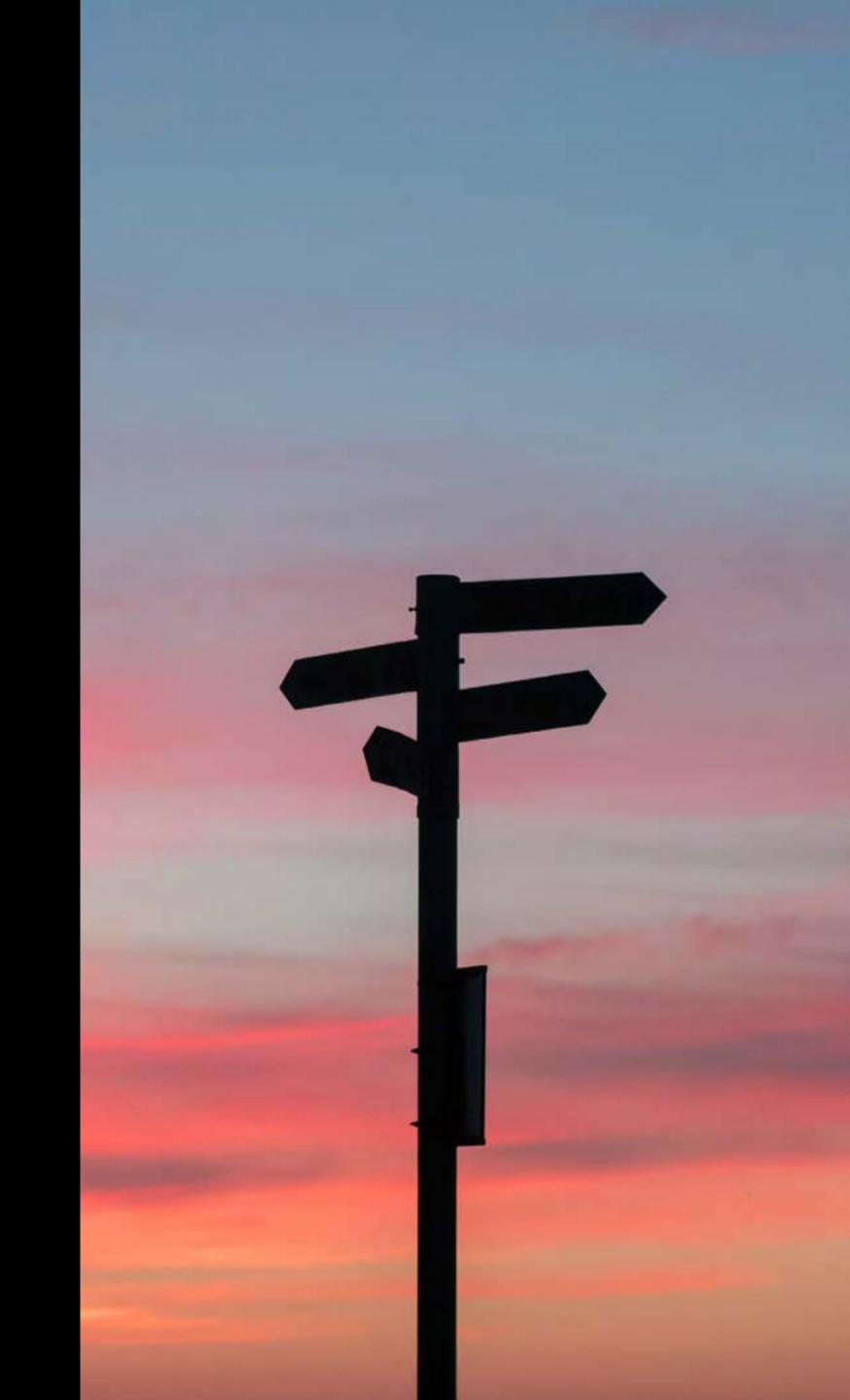
Your implementation and support partner for Sage Intacct should be one that has your best interests at the core of the relationship. You want to be able to trust your Sage Intacct partner to be transparent and honest throughout, and support your business' growth, identify future challenges relating to the software and proactively make recommendations for change. You need to be able to trust that they can resolve issues in a reasonable timeframe and keep you informed on progress, and that you are not unnecessarily overcharged for standard services.

Not all partnerships work the way you hoped. It's not always love at first sight and it takes commitment from both sides to make the relationship work, but when it's clearly the partner at fault, 'plenty more fish in the sea'.

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Top reasons why businesses change support:

- Poor or slow response to questions or support tickets

- Lack of experience within the partner's team

- No knowledge of, or failure to discuss, Sage Intacct updates and news

- Little contact from the partner – only when it's time to renew your contract or an invoice needs to be paid

- The partner has limited knowledge of your industry or your business' needs to enable growth

- Implementation was unsuccessful and you are left with an unusable solution

- Unresolved issues due to lack of experience or knowledge

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Better the Devil You Know!

We get it. Making the move to another partner you may feel sometimes isn't worth the hassle, and who's to say you will any better service for the next one.

This can be true but if your current situation is that much of a concern for you to be thinking about it – what have you got to lose?

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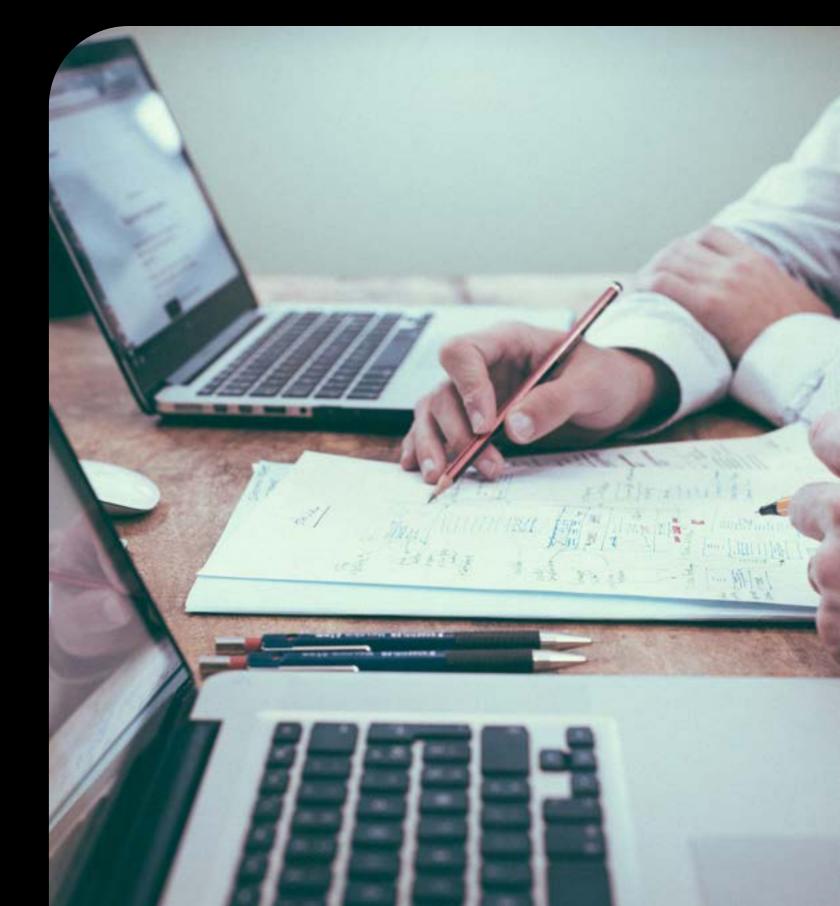**Just make sure that the move and the partner is right for you and your business. Things to consider:**

• Be sure the service is no less than what you are getting now and that it offers value for money.

• Do they have ample experience of implementing and supporting Sage Software?

• Do they have experience in your industry?

• How long have they been in business?

• Do they have a large Sage Intacct team?

• Are they able to outline the implementation methodology?

• Have they got referenceable customers?

• Do they offer fixed price project costs?

• Do they offer flexible support contracts?

• What does onboarding look like?

With Acuity24, you could try before you buy – if you have a challenging issue that your existing partner has been slow to resolve, give us a call.

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Congratulations, you've decided to move, what next?

This is where you identify your reasons for looking at alternative support providers. Before approaching any other partners, it's incredibly important that you review your current partnership – it shouldn't just be about getting a better support price.

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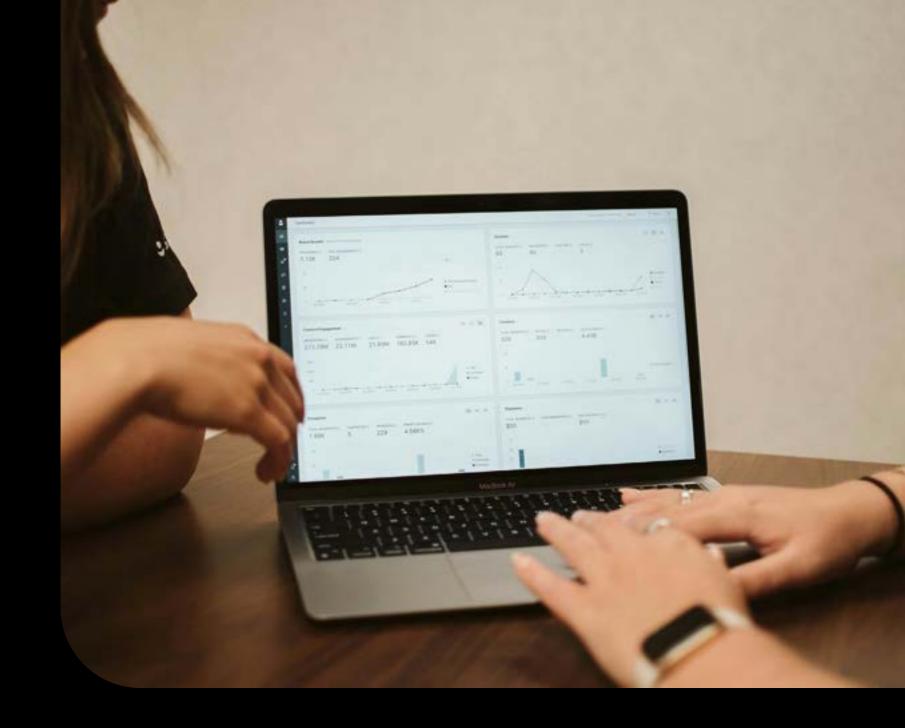
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Consider these Questions:

• What are the main reasons for wanting to move support?

• What is working currently?

• What isn't working?

• What would you like to change if you could?

• What do you need from a new partner?

• What are your non-negotiables?

• What do you use now that you could do without?

• What level of support do you really need?

• When is your support contract due for renewal?

• Are you able to move? You may be in a long-term contract and need to negotiate an early release.

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It's probably wise to write the answers to these down in preparation for talking to partners. Engaging a new partner without preparation or an idea of what you need from them is going to make the process that much harder and could potentially result in you getting stuck in another partnership that will make you wonder why you changed in the first place.

You might want to consider putting together a document of requirements that outlines your expectations for Sage Intacct and the new partner. This could include:

• Does your system fit your needs, now and for the future?

• How often do you use support, and what type of challenges have you had?

• Is your team fully trained to use Sage Intacct, would they benefit from more?

• What are you happy/unhappy with in Sage Intacct?

• What add-ons/customisations have been created and will they be needed going forward?

Selecting a Partner:
What Should you look for?

You've gathered your quotes, spoken to a few potential partners, and now you need to make a decision. But where do you start?

There are several things to consider when selecting a new partner, and we would argue that this process is going to be even more important than your decision-making process for switching to or adopting Sage Intacct in the first place.

Moving to work with a new Partner is an involved process, can be stressful, and it is incredibly important for your business that you get this decision right. No pressure.

Our first tip would be to consider the manner of the people you discussed your proposal and the process with at each of the companies. If the person or people you spoke to didn't seem enthusiastic about the prospect of working with you and your company, they probably aren't. So, scrap them from the list.
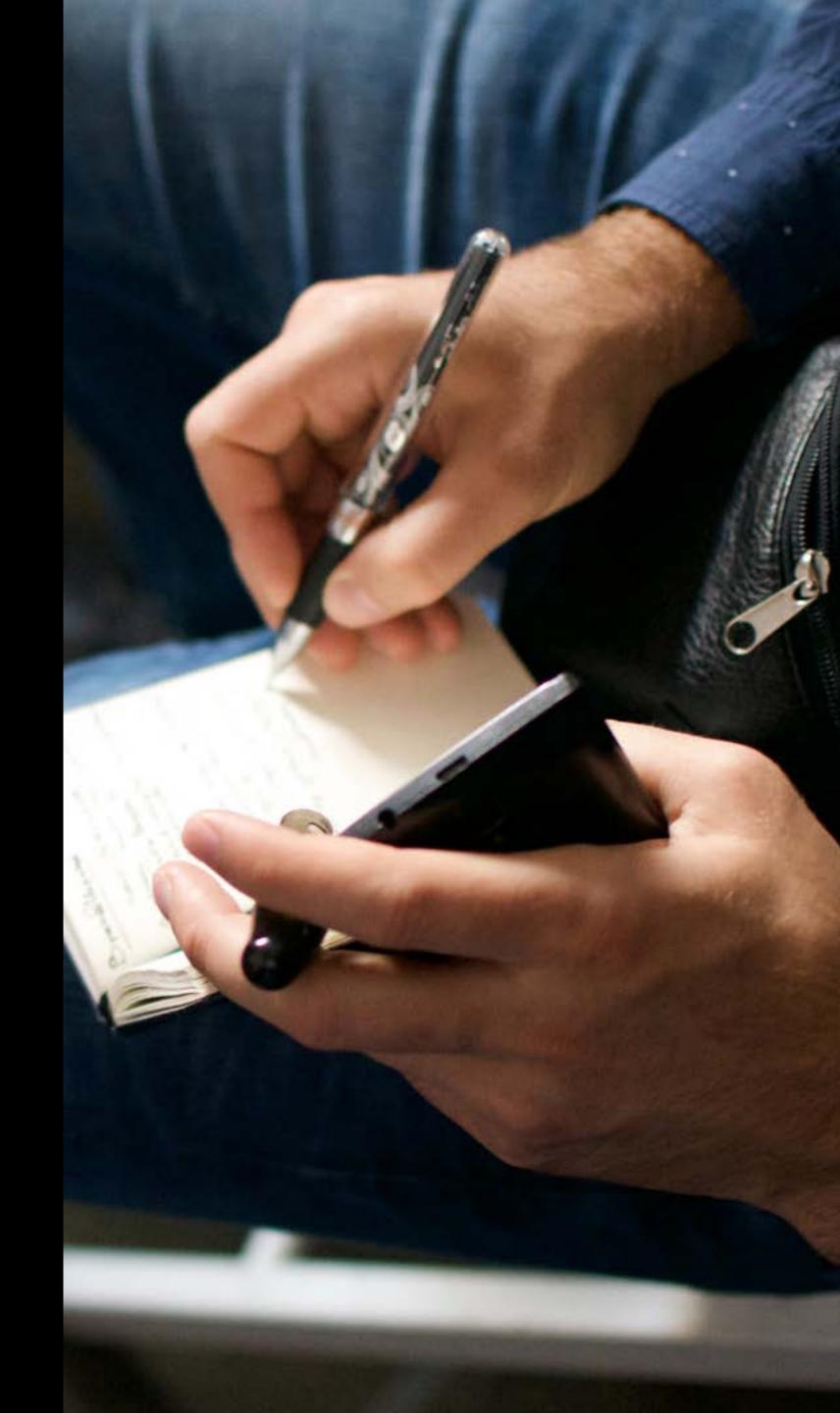
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Secondly, you are looking for a partner you can trust. Again, think back to the interactions you have had with them. Have they been transparent with you about costs, the time involved in making the switch, how they can help make improvements and addressed any other concerns you had?

Look at what they can offer you that the other partners can't - if anything.

And finally, do they tick the boxes of the things you outlined as must haves and must avoids in the previous chapter?

Once you have answered the above you should be ready to make your choice.

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You've found a new partner. What now?

Pretty much the same as when you signed up to your current provider, you sign a contract and agree terms of business. The partner will inform Sage directly about the change of partner, but you may need to email them authorisation to access information. This will just be an email.

It's as simple as that!

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7 Reasons to Choose Acuity24 as your Next Sage Intacct Support Partner

1. We are the only Sage partner in the whole of the UK that offers all customers a fixed-price implementation – no nasty hidden costs or surprises!

2. We guarantee the cost and scope of all projects and only bill you at agreed milestones

3. We guarantee increased customer satisfaction through accurate project budgeting

4. We specialise in complex, multi-entity implementations here in the UK and internationally

5. We create and build add-ons that enhance the capabilities of Sage software to support and enrich your business

6. We have a large, fantastic Sage Intacct team that genuinely care about every one of our customers!

7. We don't believe that our relationship stops after implementation – we want to continue to help you to get the most out of your Sage solution and help you grow.

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