RSM 100

WIA builds a scalable finance foundation with Sage Intacct

Key takeaways



Challenge

An aging on-premises system and siloed invoicing limited visibility for a lean finance team.



Solution

RSM helped WIA select and implement Sage Intacct, centralizing core finance functions in the cloud.



What's next

Next up: integrating AP, expense management, vendor onboarding and forms with Sage Intacct.

When the Wireless Infrastructure Association (WIA) evaluated their financial management system, the organization decided they needed more than a replacement for their platform. According to LaShena Honore, controller at WIA, the organization required a modern, cloud-based system that could support increased transparency, connect with other systems and help a lean finance team keep pace with a growing organization.

"Our old platform had reached its limits," says Honore. "It just couldn't do a lot. We needed something more up to date."

WIA brought in RSM to help select, implement and optimize a new system for the organization. With RSM's support, WIA picked Sage Intacct after evaluating multiple systems.

Through the engagement, WIA has modernized their core accounting operations, brought more invoicing activity under the finance umbrella and built a foundation for future automation.

The challenge of modernization

WIA represents the businesses that build, develop, own and operate the nation's wireless infrastructure. The organization's members—including carriers, infrastructure providers and professional services firms—own and manage nearly 655,000 U.S. structures dedicated to wireless connectivity.

Before the engagement with RSM, the association's finance function was working within the limits of its technology. The aging on-premises system no longer matched the organization's operational needs. The system relied on physical servers just as WIA was moving away from them, and it did not easily connect with other key applications

used across the association. That lack of integration created practical barriers.

For example, when WIA needed information from other systems or departmental platforms, the process often involved flat-file exports, manual imports and one-off work-arounds.

Invoicing was also fragmented across departments. Membership, events and other teams each had their own process, which limited the finance team's visibility into open invoices, customer history and other details.

The organization's goals were to move to the cloud, improve transparency, reduce reliance on spreadsheets, centralize accounting data and create a system architecture that could integrate with WIA's broader technology environment. The new platform also needed to be accessible enough for a small team to manage day to day, while flexible enough to evolve as WIA's needs change.

A potentially powerful solution

During the evaluation process, Sage Intacct stood out for its usability, cloud-based architecture, integration capabilities and pricing. It also scored highly with WIA's users, who could envision running with the system once it went live.

RSM's familiarity with WIA's environment was the basis for the transition. Because RSM had experience with the existing platform and Sage Intacct—and understood WIA's accounting structure and operating model—the implementation team could translate existing processes into the new system more effectively. RSM helped WIA determine how to structure entities and reporting relationships, including separating department and program dimensions and creating the parent-child relationships needed for better reporting.

"RSM saw how we were using our platform and how that translated into Sage," Honore says. "That made the implementation a lot smoother than if we were starting fresh with someone who didn't know us or Sage as well."

The implementation also created the basis for future phases. WIA knew that once their core accounting system was modernized, they could bring more activity under the finance umbrella, including functions that had previously lived in departmental systems. Sage Intacct's open API and marketplace ecosystem gave WIA a framework for connecting finance with the other systems the association relies on.

Major results

With Sage Intacct in place, WIA gained visibility into financial information that had previously required manual work, system hopping or spreadsheet reconciliations. The finance department could respond to leadership questions with relevant information instead of chasing data scattered across other departments.

That visibility changed how work was distributed. Before the RSM engagement, the association's sales team often had to follow up on invoices because they had the clearest view into open balances. But after implementing Sage Intacct, the sales team could focus more on customer relationships instead of administrative follow-up.

"We can answer more questions now than we could when we were using the old platform," Honore says. "We have a lot more insight."

More broadly, centralizing core finance functions on one online platform created efficiencies across the organization, freeing program departments to spend more time on work that advanced WIA's mission.

WIA has also increased operational complexity without increasing staffing. The association remains relatively small, with a lean accounting function. RSM's solution has reduced manual support needs and saved time for the finance team. Since moving to Sage Intacct, the finance department has taken on more sophisticated reporting and centralized more invoicing activity while continuing to look for automation opportunities.

Other improvements include bank connections for reconciliations, customizable dashboards, drill-down reporting, prepaid expense journal entry automation, import functionality for journal entries and the ability to attach documentation directly to journal entries and other records. By reducing the need to maintain supporting documents outside the system, WIA has improved efficiency and audit readiness.

> **Before, I had to work around the system. Now, I don't have to go to Excel to give people the level of detail that they need to do their jobs better.**



LaShena Honore
Controller,
Wireless Infrastructure Association

Ongoing optimization

For WIA, the value of the engagement did not end after going live. When a new Sage Intacct feature appears relevant, RSM analyzes whether it fits WIA's operating model and long-term roadmap.

That ongoing relationship helps WIA avoid the risk of letting a modern system become stagnant. Instead, WIA is using Sage Intacct as a platform for continuous improvement, and the association is exploring additional functionality within the Sage ecosystem.

Looking ahead

As WIA evaluates their next phase, integration remains a defining requirement. RSM will facilitate the connection of new systems with Sage Intacct, support real-time reporting and reduce duplicate work. The association is especially focused on integrating more workflows with Sage Intacct, including accounts payable, expense management, vendor onboarding and operational forms. With a modern financial foundation in place, WIA is better positioned to scale processes, increase transparency and give stakeholders more access to information.

The engagement shows how the right combination of cloud technology, integration strategy and ongoing advisory support can help organizations move to a more connected, adaptable operating model. Honore says RSM's experience and focus on results were key to the association's transformation: "RSM didn't just stop at implementation. They are still a resource for us. And I believe that our relationship with them will continue to evolve and strengthen over time."

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