

BroadPath, Inc. Triples in Size with Help from BT Partners and Sage Intacct

Industry	Client Since	Solution
Professional Services	2019	Sage Intacct

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BROADPATH Brian Peura, VP of Finance, Payroll, HR and Compliance, BroadPath, Inc.

Companies trust BroadPath, Inc. with their most important assets — their customers. BroadPath provides virtual call center and customer support services for insurance providers, financial services firms, travel and hospitality enterprises, and high-growth companies. The innovative company’s workforce has always worked remotely, providing BroadPath with tremendous flexibility to scale quickly to meet the needs of its customers. That agility proved especially valuable during the 2020 pandemic when its services were in even higher demand. Supporting the company’s financial management technology platform are the cloud accounting and ERP professionals at BT Partners.

Outgrowing Quick Books

“We’re a lean operation and are always looking for ways to use technology to help us do more with less,” says Brian Peura, VP of Finance, Payroll, HR, and Compliance for BroadPath. “We were using QuickBooks, but it didn’t support the extended functionality we wanted to incorporate in our operations. The organization needed to move beyond bookkeeping to professional financial management, and our search for a true cloud accounting solution began.”



Knowing it wanted a multi-tenant SaaS application to support its distributed workforce, BroadPath reviewed both Oracle NetSuite and Sage Intacct. Ultimately, the company decided the combination of BT Partners and Sage Intacct was the best solution to lead it forward. Oracle NetSuite had the edge initially, but BT Partners’ emphasis on partnership won the organization’s trust. “We had previously seen an Intacct demo with one of the high-volume channel partners and ruled it out. When we saw it again with DavidThikoll and Nancy McCarthy, it seemed like a totally different solution that would fit us perfectly,” said Peura.

BroadPath didn’t initially take full advantage of the software’s capabilities, though. “We started out by simply duplicating the transactions we had been entering in QuickBooks,” Peura explains. “Sage Intacct can of course handle that, but it’s capable of so much more. I decided to explore how we could expand our use of the software’s capabilities to automate additional business processes and add new efficiencies.”

Strategic partnership provides clear path forward

Peura called in their consulting team at BT Partners to help strategize the next steps. BT Partners' Sage Intacct consulting team works with companies to understand their business processes and optimize them, helping them draw long-term value from the application. One of the first



integration means we benefit from best-of-breed applications with no compromises. As a result, we're saving time and resources with streamlined workflows and fewer manual tasks." Peura says he appreciates the power of the partnership with BT Partners .

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things the consulting team did was invite Peura to attend the annual Sage Intacct Advantage conference. "The conference was a great experience," he says. "It's powerful to hear other companies speak about how they're using the software to their best advantage. I learned about Sage Intacct Marketplace solutions that extend Sage Intacct's functionality and discovered new ways we could expand our use of the software."

Back in the office following the conference, BroadPath and BT Partners developed and executed a clear path forward, incorporating new tools and applications to help meet the company's goals. BroadPath incorporated multiple Sage Intacct Marketplace applications, including an AP automation solution, a payroll integration tool, a banking interface, budgeting and planning tools, and a robust reporting engine.

"Sage Intacct is a world-class financial management solution that aligns itself with other applications that are world-class in their functionality," says Peura. "That approach combined with seamless

Supporting a strong growth trajectory

Since BroadPath implemented Sage Intacct two years ago, it has grown from 500 employees to over 3,000. "Without a scalable financial management system and a trusted and responsive business partner, that kind of growth would have been exceedingly difficult," says Peura.

He concludes, "Part of what makes BT Partners a good partner is that they aren't ones to simply tell me what I want to hear — or advise me to make the choices that will make them the most money. I know that every time I reach out to them, I get fast, thoughtful answers based on their experience in our industry and with Sage Intacct. I trust that experience and know BT Partners will always steer us in the right direction."