



# DISCOVER TRANSFORMATION OPPORTUNITIES IN COMMERCIAL REAL ESTATE

Oct. 31, 2023

# Learning objectives

By the end of this course, you will be able to:

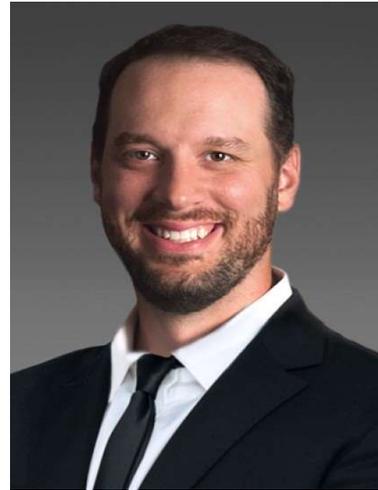
- Identify real estate digital transformation trends
- Effectively evaluate existing technology platforms
- Explore Sage Intacct's compatibility with their own real estate ERP requirements

## RSM presenters



**Melissa Perkins**

**Sage Intacct  
Real Estate &  
Construction Lead**



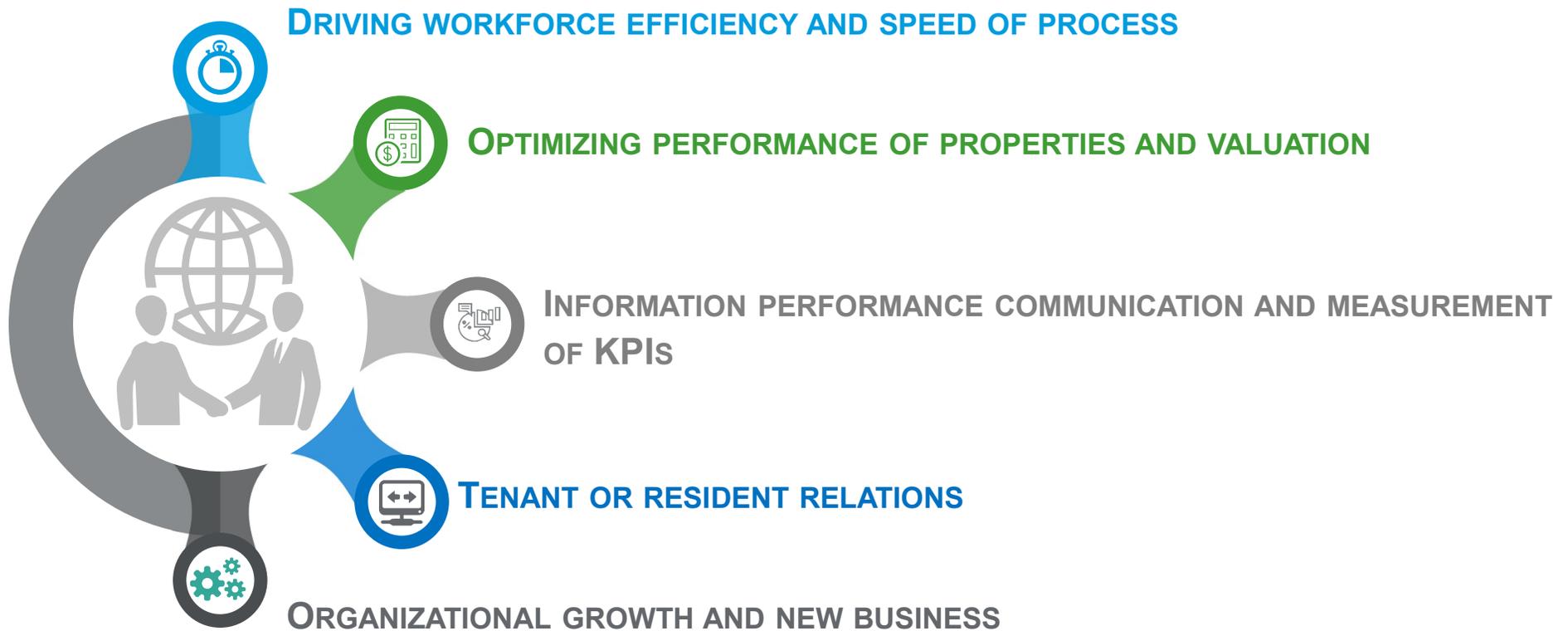
**Troy Merkel**

**Real Estate &  
Construction National  
Consulting Leader**

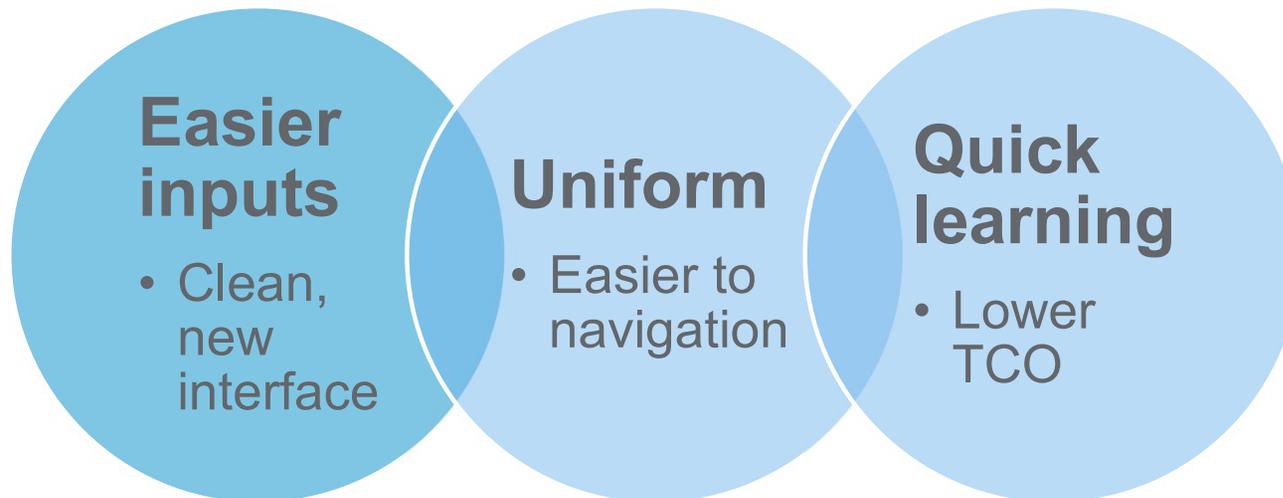
# Agenda

Topic	Minutes
Digital transformation in real estate	15
Introduction to Sage Intacct & real estate module	5
Sage Intacct Real Estate demo	25
Demo follow up	5
Ideal client follow up & wrap up	5
Q&A	5

# What is important to real estate clients?



## Driving workforce efficiency



CREATING A BETTER USER EXPERIENCE

# Property performance / valuation



CAPTURE ALL  
REVENUE  
OPPORTUNITIES



KNOW AND CONTROL  
SPEND



INCREASING NET  
OPERATING INCOME  
(NOI) = INCREASING  
PROPERTY VALUE



BETTER CONTROL AND  
UNDERSTANDING



BUDGETING

# How do you get your information?



Consumers of information are different

Not everyone interprets information the same

Detail or summary?



Breakdown silos

Who needs information?

Who provides information?

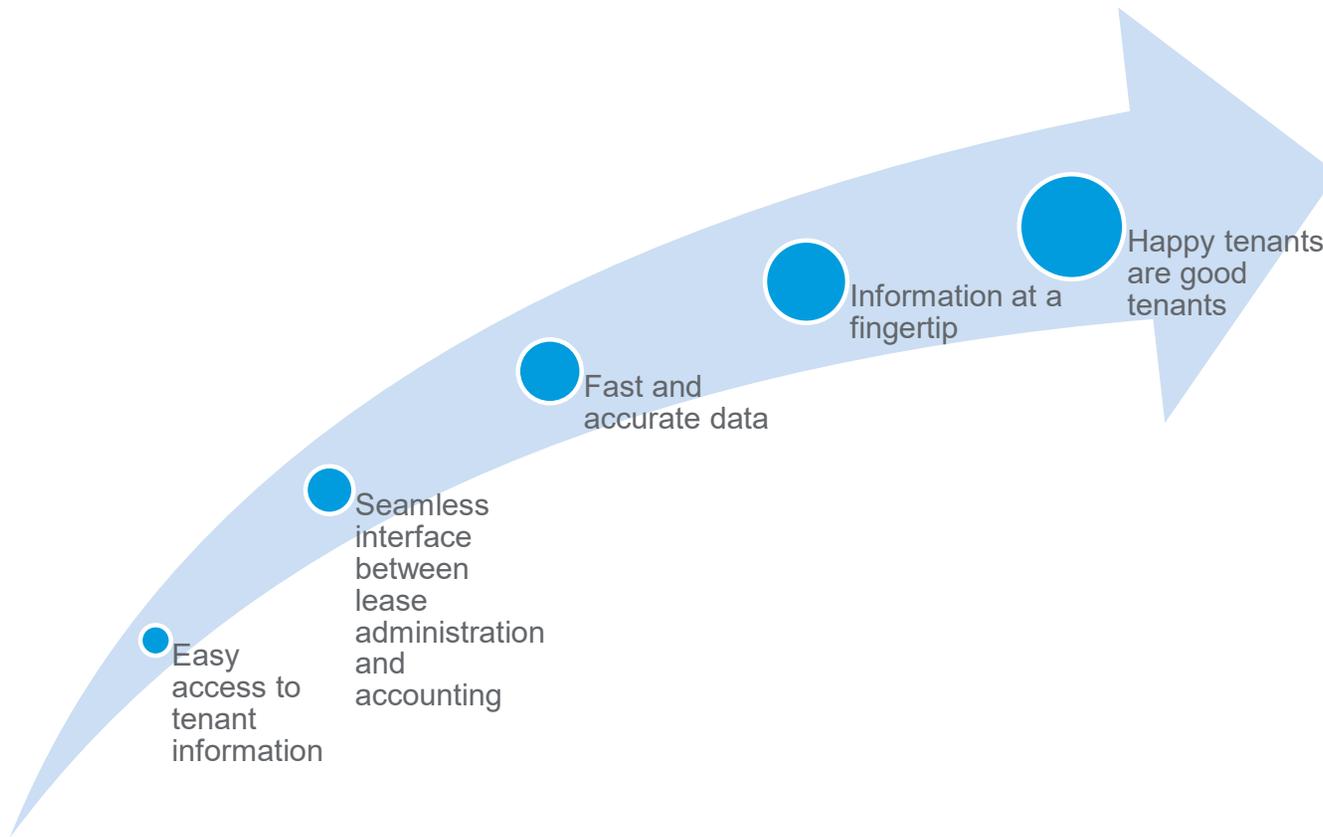


Creating and delivering information that matters

Key performance indicators

Stakeholder communication

# Tenant / resident relationships



# Organization growth / new business



**Help your clients expand their business**



**With the proper infrastructure**

Take on more properties  
Utilize fewer resources



**How do they increase their business?**

More properties  
Additional investors  
Better financing

# Why Sage Intacct Real Estate?



**Real estate owners and operators** can increase the value of their assets by capturing all revenue and monitoring their spend, thereby increasing their Net Operating Income (NOI).

## **For executives**

Sage Intacct Real Estate is a scalable solution that can grow with your business, drive workforce efficiency with state-of-the-art technology, and provide unmatched reporting capabilities for stakeholder communication – all for a lower total cost of ownership.

## **For property managers**

Sage Intacct Real Estate provides a central repository for lease information and easy to build and easy to use dashboards to track financial and operational metrics.

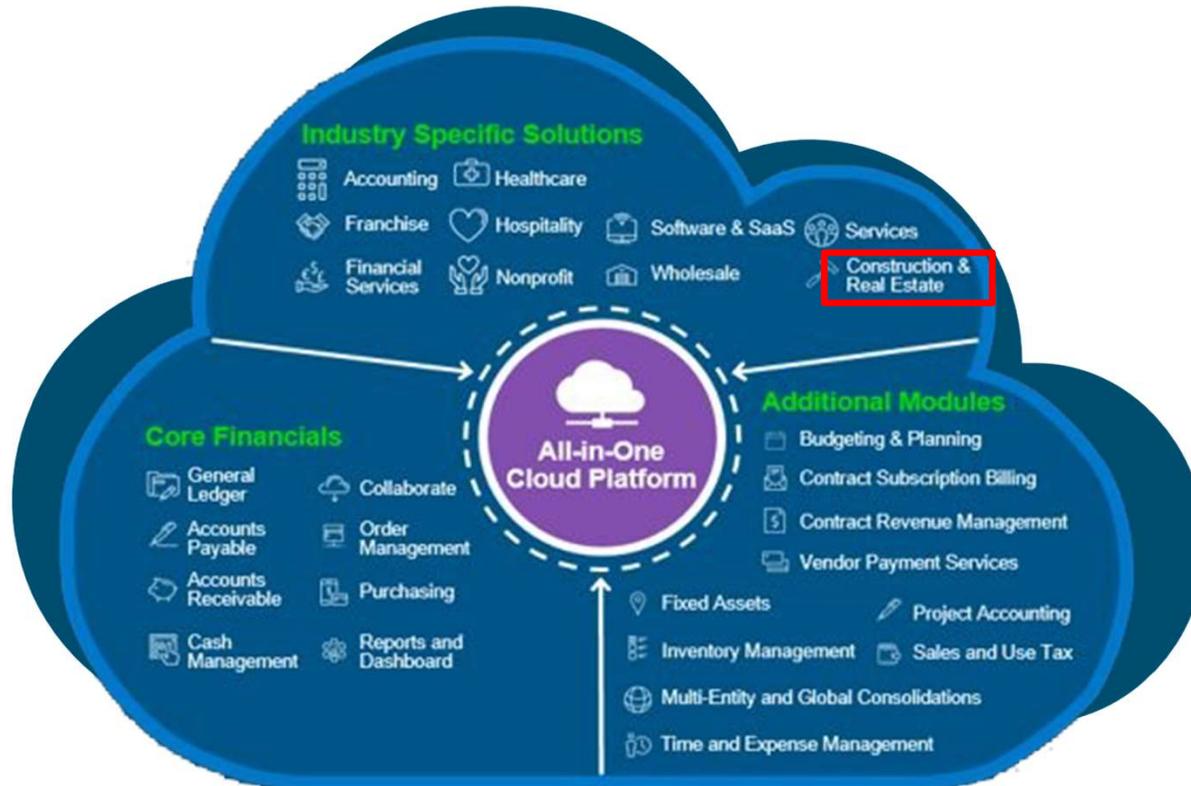
## **For the accounting team**

Sage Intacct offers the best accounting platform in the market, allowing easy access, easier reporting, and best-in-class security.

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# INTRODUCTION TO SAGE INTACCT & REAL ESTATE MODULE

# 'Born in the Cloud' financial management solution



#1  
Customer Satisfaction



# Sage Intacct Real Estate

Commercial and residential real estate cloud solution

Multi entity capabilities

Modern and easy to learn interface

Strong reporting and dashboard capabilities



Developer and contractor solution

In-depth financial reporting

Lease administration and management

Simplified month end close

Integration with Sage Intacct, which eliminates manual data duplication between disconnected systems to save time and reduce errors.

# Real estate software comparisons



## Products:

- Voyager – SAAS (> 1M SF or 1,000 units)
- Breeze – SAAS (< 1M SF or 1,000 units)

## Strengths:

- Household name
- Full solution suite with use of 3<sup>rd</sup> party providers
- Single integrated product suite

## Weaknesses:

- Older user interface
- Costly to implement and difficult to maintain
- Lack of flexible reporting



## Products:

- Version X – SAAS only (on premise smaller client)

## Strengths:

- Industry standard for commercial
- Many ancillary projects dedicated to multi-family
- Very strong partner program
- Very strong accounting

## Weaknesses:

- Constant ownership change
- Lack of flexible reporting difficult to maintain
- Lack of product integration



## Products:

- Multifamily
- Leasing & Rents - SAAS
- Buildium - SAAS
- Propertyware – on –premise
- RealPage Commercial - SAAS

## Strengths:

- Industry standard for multifamily
- Many ancillary projects dedicated to multi-family
- Use Sage Intacct for their accounting

## Weaknesses:

- Older user interface
- No consulting or support on implementation
- Commercial is not a focus



## Products:

- Sage Intacct with Real Estate Module – SAAS only
- Sage Intacct Construction – SAAS only

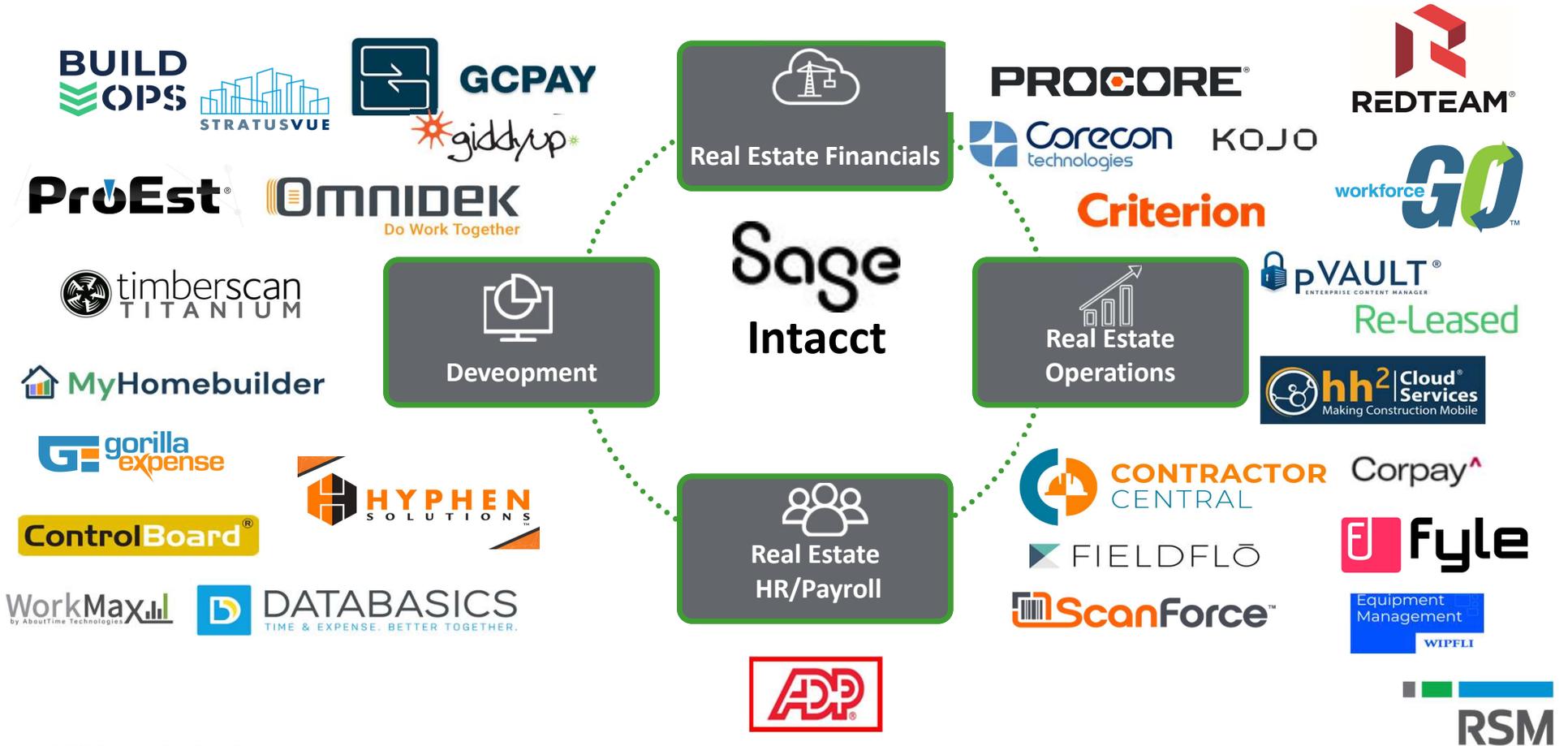
## Strengths:

- Robust reporting and dashboards
- Strong accounting
- Use Sage Intacct for accounting
- Strong partner program
- Lower TCO, quick on boarding
- Modern and easy to use interface

## Weaknesses:

- New to real estate industry
- Not strong in affordable housing

# Sage Intacct Real Estate strategic partners





# SAGE INTACCT REAL ESTATE DEMO

## Introduction

Perry Levine began his real estate career in 1982, working for a national real estate investment firm with a portfolio that included multifamily and commercial assets. Since then he has worked for organizations ranging from a regional entrepreneurial developer to a Wall Street listed REIT. His real estate career encompassed leadership roles and involved him in accounting, asset and property management, construction, development, leasing (in-line and RMUs), brokerage, acquisitions, dispositions, financing (debt and equity placement), staffing and technology. Throughout his real estate career, he has worked with many asset classes, including:

- Residential (multifamily, SFR, mobile home parks)
- Commercial (office, industrial, retail)
- Self-storage
- Specialty properties (parking lots, bowling centers, car washes)

In addition to this hands-on industry experience, Mr. Levine has worked for technology companies such as MRI Software, Yardi, RealPage, Sage / Timberline, and others. His technology experience includes leadership roles where he launched new products (including go-to-market strategy, branding and execution); trained sales, marketing and support staff on products and the real estate industry; and provided subject matter expertise and thought leadership. He has personally conducted over 2,000 solution presentations and sold millions of dollars of technology solutions to real estate organizations ranging from small companies to institutional investors.

Mr. Levine received his degree in Finance from California State University and previously held professional real estate licenses in Oregon (broker) and California (salesperson).





CALL TO ACTION

## Background

### DEVELOPER

- Risk taker
- Long- or short-term hold
- Needs robust, multi-entity accounting
- Construction job cost is important
- Understands that technology is an important management tool

### OWNER\OPERATOR

- Risk averse
- Needs robust accounting with flexible COA
- Easy to use and flexible reporting
- Easy to use / easy to learn system
- Needs to break down information silos
- Looking for central repository of information

## Goals & Challenges

- Mitigate financial and operations risk
- Maximize workforce efficiency
- Strengthen internal controls and processes
- Hire, train, retain, and nurture employees
- Stakeholder reporting and communications
- Maximize property and portfolio value
- Achieve investment returns

### BEST FIT

- Developers of commercial properties
- Owners / operators of commercial properties
- Specifically: "value-add" investors

## How many RSM clients are on legacy systems?



# What to listen for?

## Organization

“Our current leadership structure has undergone significant changes.”

## People

“I have various people performing tasks outside of their intended role”

## Strategy

“We plan on doubling in size over the next 3-5 years”

## Technology

“I have to download this Excel to make edits and re-upload multiples times”

## Data

“I can enter vendor data in 3 different places.”

## Changes

“We are considering changing systems.”

## Organization

“Our IT department is a mess, they have no strategy, no idea what they are working on.”

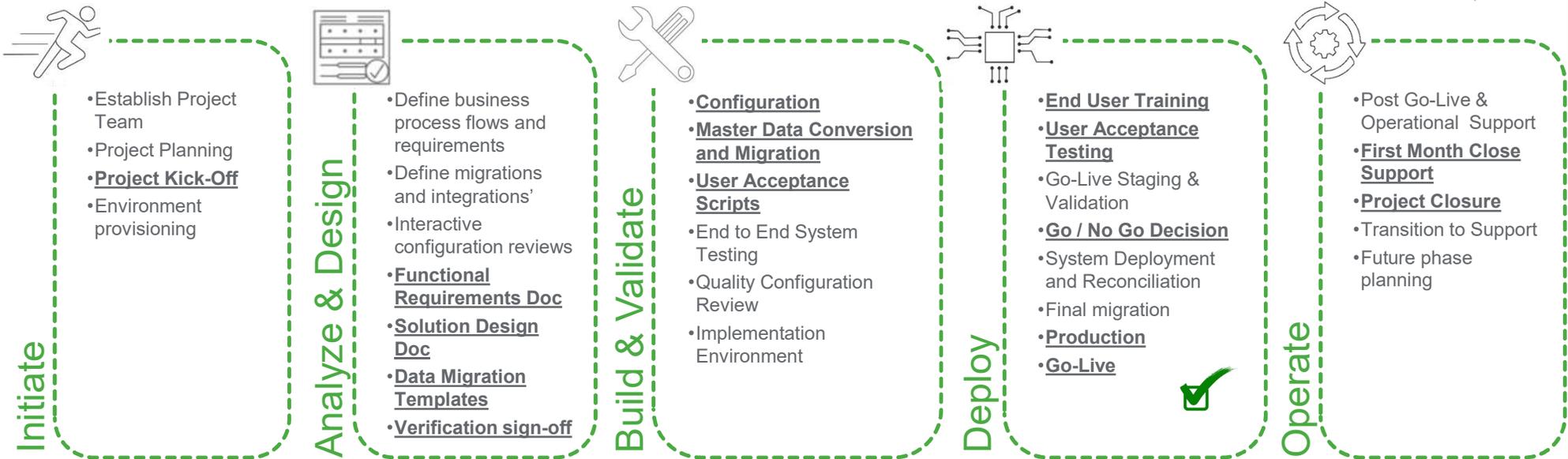
## Data

“I have this 50-tab spreadsheet to create this report”

# Project implementation cycle

Project, risk & issue management

Delivery excellence and quality assurance



Training and knowledge transfer



# RSM Sage Intacct Real Estate leaders

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# Industry panel discussion

## Q&A

What should we be asking our [\_\_\_\_\_] clients?

What is an example of [\_\_\_\_\_]?

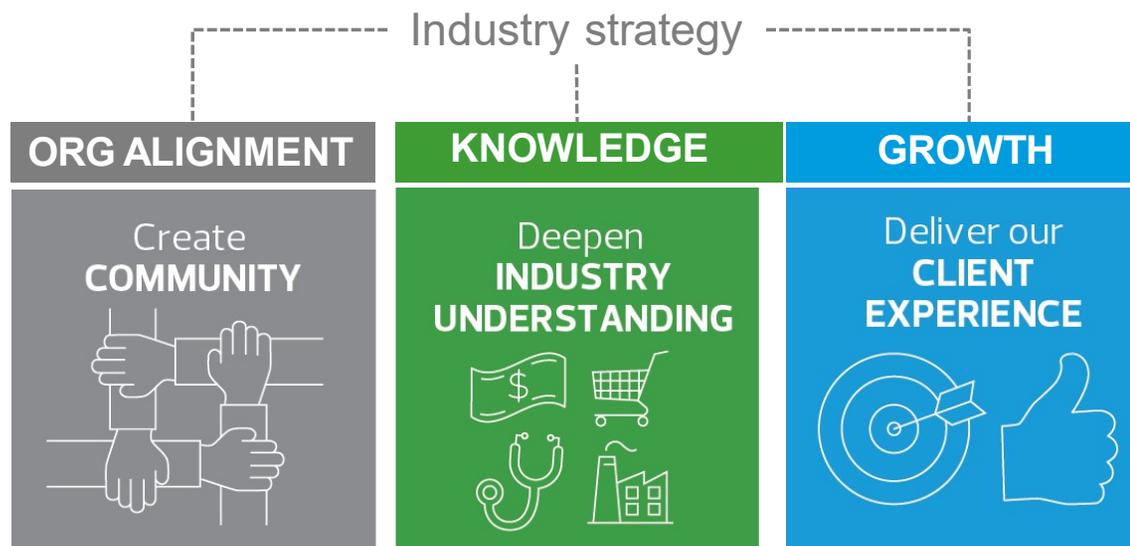
What is a typical [\_\_\_\_\_]?



# QUESTIONS AND ANSWERS

# Industry strategy

Industry is the **force** that **ignites** our people to seek **knowledge** and **engage** in meaningful ways with clients and prospects to deliver the **power of being understood**.



THANK YOU FOR  
YOUR TIME AND  
ATTENTION



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