

Success Story

Efficiency delivered right on time

Montana CAD builds its future on Sage Intacct's next-generation technology

“Sage Intacct has already paid for itself in time savings. It's our platform for growth and we're just getting started.”

Logan Lamm

Vice President and General Manager, Montana CAD



The Challenge

Montana CAD was growing quickly, and manual accounting tasks occupied an increasing amount of the principals' time, leaving less time to optimize operations for maximum efficiency.



The Solution

The company selected Sage Intacct for its native cloud infrastructure, integration capabilities, and automated workflows that reduce manual data entry tasks.



The Outcomes

Montana CAD's management team is able to spend more time working on the business, instead of in the business.

- Saving 5 hours per day in administrative tasks.
- Reporting insights fuel a competitive advantage.
- Tripled in size without need for additional accounting staff.
- Unified API streamlines custom application development.

Sage

Company
Montana CAD

Location
Montana, US

Industry
Trucking Services

Sage Products
Sage Intacct



About Montana CAD

Montana CAD has been serving the Flathead Valley since 1998, placing rock, sand, topsoil, and bark right where they're needed. In recent years, it has added our Telebelt and Transfer Trucks to its operations to better serve the people of the great state of Montana.



A building boom

The Flathead Valley in the northwest corner of Montana is home to some of the most beautiful backwoods country in America, including iconic Glacier National Park. It's also become something of a boomtown. The county's population shot up more than 20 percent in the past decade — with much of that growth during the pandemic. As the area grows, one local company is growing too, to keep up with demand. Montana CAD (Conveyored Aggregate Delivery) is a family-owned enterprise supplying homeowners and builders with gravel, landscape rock, soil, and wood products.

To meet the increasing demand for its products and services and to place the company on a rock-solid financial footing, Montana CAD migrated from Sage 100 to Sage Intacct.

Next-generation solution to power the next generation

Logan Lamm joined the family business founded by his parents after graduating college in 2017. Since then, the company has nearly tripled in size. Today, Logan serves as Montana CAD's Vice President and General Manager. "We are expanding quickly and knew we'd need to invest in the technology infrastructure to support that growth," he says. "We'd used Sage 100 for years but wanted a next-generation, cloud-based solution that could integrate with dispatch software application we were working on."

Primarily because the company had so much success with Sage 100, Logan zeroed in on Sage Intacct as that next-generation solution. "Sage put us in touch with a top-notch partner who showed us the product's capabilities and helped us make the decision to migrate to Sage Intacct," Logan says.

Sage Intacct provides a unified API that streamlines and simplifies adding and maintaining integrations. It's proven successful as Montana CAD is close to launching a custom-developed dispatch application.

Five hours back in the day

The company operates with a lean back-office staff, focusing the bulk of its resources on its field and operations teams. "There's just three of us to handle accounting and dispatch tasks," notes Logan. "We were busy, and it left little time for me to strategize and get out in front of operations."

While the migration to Sage Intacct represented a financial investment for the company, they've never looked back. "Sage Intacct may cost more than staying where we were, but it's already paying for itself," says Logan. "We felt we would need to hire one or two additional accounting staff to keep up with our growth."



Montana CAD is building a technology infrastructure that will carry it forward into and beyond the next generation.

Now, we don't need to. The efficiencies we're gaining with Sage Intacct allow us to continue growing without adding any additional accounting personnel."

One time-saving efficiency gained is allowing customers to click on a link in an emailed invoice and pay by credit card. The capability is made possible through an integrated payment processing application. What it means for Montana CAD is less manual data entry and faster order-to-cash processing times.

"It definitely saves us time. In fact, it's easily put five more hours back in my day," says Logan. "We no longer have to enter cash receipts and handle checks, and customers are likely to pay their invoices more quickly when it's this easy."

Boosting competitive advantages

Many of Montana CAD's customers are local contractors working on multiple projects simultaneously. Logan has found a way to provide the contractors with reports detailing their spending by individual project. "We've built reports that sort expenses by the ship-to locations on the invoices, providing each contractor with a breakdown by project," he says. "We can report on tons of material, price per ton, and more. It's definitely of value to our customers and something I don't think many of our competitors can do."

Time for what matters

One goal for the implementation was to introduce the efficiencies that would allow Logan's parents to take a step back, travel, and have more time to themselves. Logan explains, "My mother still handles accounts payable, but with Sage Intacct, she can do it from home or while on vacation."

He concludes, "There's a saying that to be successful, you need to work on the business, not in the business. With Sage Intacct, we're getting closer to making that happen. I've got more time to strategize, plan, and make improvements. We're using the time and resources saved to bring efficiencies to other areas of the business. Ultimately, that's how Montana CAD will continue to grow and succeed."



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