

Success Story

From pastures to property with Sage Intacct

“We’ve been impressed with the capability of Sage Intacct to meet the needs of our individual entities and then consolidate for a top-down view of the group.”

Lidija Kitinovski

CFO, Perich Group of Companies



Perich Group implements Sage Intacct

From humble beginnings running dairy operations in western Sydney, the Perich Group of Companies has grown over the past 50 years to become a large and successful family office. The organisation has a number of different operating divisions and entities including property management and development, with significant and diversified agricultural operations.

As the organisation has grown and evolved over the decades, the complexity of managing multiple entities in different industries has increased. By implementing Sage Intacct, the accounting and finance team at Perich Group has welcomed a new era of operational efficiency and consolidated reporting.



Results with Sage Intacct:

- Consolidation of multiple systems into a cloud-native platform with out-of-the-box functionality
- Suitable for diverse industries with efficient group-level consolidation
- Smooth transition from legacy systems
- Partner-led implementation in four months
- Bi-directional integration with Re-Leased for property management and finance
- Sage Marketplace enables integrated asset management and payroll
- Significant time savings on accounts receivable and payable processing
- Monthly management reports delivered in one day (previously one week)

Sage

Company
Perich Group of Companies

Location
Australia

Industry
Agriculture
Property – Real Estate

Solution
Sage Intacct

Partner
Leverage Technologies



About The Perich Group of Companies

The Perich Group of Companies is an Australian-owned family office that operates a number of businesses across various sectors. The organisation has agricultural businesses in dairy, cropping and cattle, and is invested in some of Australia's best known and loved food and beverage brands. Perich Group also owns, manages and develops property projects including residential, commercial, industrial and shopping centres.



Outgrowing legacy operating and accounting systems

Like many long-established businesses, most of the entities within the Perich Group were running legacy systems and applications, including custom spreadsheets, that had adequately served industry verticals such as dairy, cropping and cattle for many years.

While the dairy and agricultural businesses adopted Sage X3 more recently, the property management and property development businesses were looking for a new technology solution.

At the same time, the group finance team needed to consolidate various legacy accounting systems to provide a more consistent and consolidated view of finances across the group.

Property management needs drive technology review

With large landholdings in and around Sydney, and as land use and zoning evolved to meet the demands of a growing global city, Perich Group diversified into property management and property development. Diverse property holdings include commercial, industrial and shopping centres, with emerging residential development opportunities.

To meet the needs of the property team, a standalone accounting system was implemented alongside specialist commercial property management software Re-Leased.

Re-Leased helps make property management easy

Perich Group implemented Re-Leased to improve the operations and financial management of their burgeoning property management business.

This specialist commercial property management software centralises critical lease, tenant and property data into a single, cloud-based platform.

Re-Leased helps property owners, investors and managers to keep track of key events and milestones such as rent reviews, lease renewals, lease expiration, along with reminders for inspections, maintenance and compliance tasks.

The software also provides insights into the performance of a property portfolio, and importantly in the case of Perich Group, it offers bi-directional integration with Sage Intacct.

“The integration of Sage Intacct and Re-Leased has significantly streamlined our property management business and ensures we have up-to-date and accurate information about rent payments and arrears across our entire portfolio”, said Ryan Murphy, Finance Manager of Property Development.



A trusted partner helps bring it all together

Sage Partner Leverage Technologies, who have worked with Perich Group for many years, recommended the implementation of Sage Intacct to meet the financial management requirements of the property team. While Sage Intacct was considered initially for its seamless integration with Re-Leased, it was also perfectly suited for all entities within the Perich Group, and the group finance team. With Leverage having a long working relationship with Perich Group, the transition from various legacy systems to Sage Intacct was both smooth and relatively fast, taking just four months to implement across the group from initial workshops to go-live.

Intacct ticks all the boxes right out of the box

Sage Intacct offers powerful functionality out of the box and delivers a range of features that suits the financial management and reporting needs of each of the entities within Perich Group. Managing multiple entities is made easy with Sage Intacct, and features such as bank feeds and integrations with third party products including Re-Leased help streamline operations and finance. As a cloud native platform, Sage Intacct offers regular, seamless system updates and upgrades, saving the finance team a lot of time and ensuring they are always working with the latest version. The finance team at Perich Group looked to the Sage Marketplace for integrated solutions to asset management and payroll. Sage Intacct's construction capabilities will also be deployed to manage the complexities of property development projects.

Perich Group reports great results with Sage Intacct

From managing the varying accounting and financial requirements across the agricultural and property businesses within Perich Group, to meeting the needs of the group finance team to provide consolidated reports and analysis, Sage Intacct has delivered. Bank feeds have streamlined the reconciliation process, there are significant time savings in the management of hundreds of invoices in accounts payable and accounts receivable, and month-end reports are delivered in a timely manner. In addition, the finance team can provide ad hoc cost centre reports quickly on request, enabling deeper analysis and useful insights. "We've been impressed with the capability of Sage Intacct to meet the needs of our individual entities and then consolidate for a top-down view of the group. Information and insights are instantly available, and the finance team is doing significantly less overtime", said Lidija Kitinovski, CFO at Perich Group of Companies.

Consolidation and optimisation

Since the implementation of Sage Intacct, the finance team at Perich Group has worked with the Leverage team to optimise the consolidation of group finances and enhance reporting capabilities. The flexibility of Sage Intacct dimensions allows for improved analysis across the group of companies, between different sectors such as agriculture and property, and within individual sectors such as analysing the industrial property portfolio in detail. Reports are now available in a timely manner, they are more accurate, and many hours per month are saved on cost reports across more than 100 active property projects. At a group level, management and board reports can be prepared in as little as 30 minutes, compared to up to three weeks preparation time using the legacy accounting systems.



“Leverage is a true partner of ours. They have been with us through various iterations of our technology stack as our organisation has grown and changed. That knowledge and consistency, especially with key Leverage team members, has proven to be invaluable as we adopt and learn new systems. It also helps make each new technology or system implementation extremely efficient.”

Darren Hooton

General Manager – Treasury & Investments at the Perich Group of Companies.

An evolving partnership

Leverage Technologies provides ERP advice, implementation, and support. For more than 20 years, Leverage has been helping Australian businesses adopt the latest technology. As experts in consulting, implementation, and integrations, Leverage is skilled in delivering cloud-first and on-premise deployments.

Leverage has a long-standing relationship with Perich Group. Their deep understanding of Perich Group's financial management needs helps keep them ahead of the technology curve. As a privately owned Australian business, Leverage understands the needs of their customers across industries, combining technical expertise with a commitment to customer relationships.

Leverage works closely with world-class technology vendors and is a Sage Platinum Partner. The company is widely praised by customers, including Perich Group, for scalable solutions that streamline processes and reduce costs.

“Our relationship with Perich Group exemplifies what Leverage Technologies is all about. As their business has grown and changed, we have helped guide, build, and support robust technology solutions that match their needs now and into the future. Technology changes, but what doesn't change is our unwavering commitment to deliver powerful solutions that improve business outcomes for our customers,” said Pierre Fourie, Sage General Manager at Leverage Technologies.



Sage



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