

E-book

The rise of the data-driven non-profit finance leader

How non-profit finance leaders can drive strategy and performance with data-driven decision making.

Sage



Table of contents

The evolving role of the non-profit finance leader	Page 3
Financial leadership 4.0	Page 5
Automation unlocks time for strategic impact	Page 7
Leverage dimensions to slice and dice your data for maximum visibility	Page 13
Conclusion: Take the lead in financial leadership 4.0	Page 20
About Sage Intacct	Page 21



Introduction

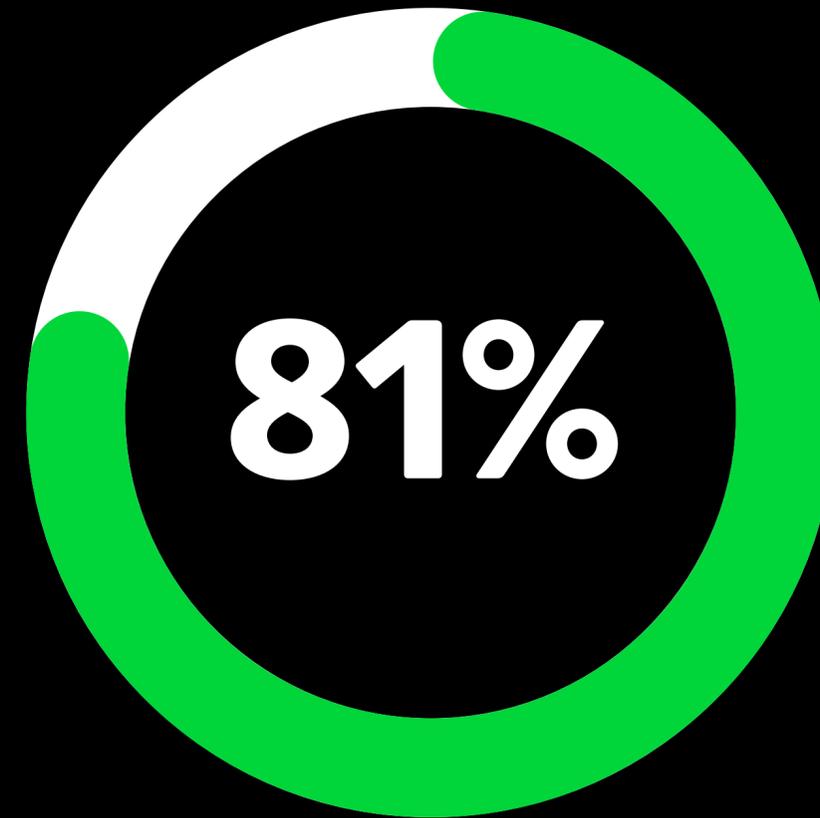
The evolving role of non-profit financial leadership

Time is the scarcest resource for today's non-profit finance leaders.

Non-profit finance leaders are more than bookkeepers. They're pivotal in driving their organisation's mission and success. And yet, 75% of their time is consumed by routine accounting tasks and managing risks, limiting their ability to lead strategically.

This imbalance leaves one in three non-profit executives making critical decisions reactively or with significant delays—missing opportunities to drive their mission forward. By focusing on automation, data-driven decision-making, and integrated financial systems, CFOs can reclaim their time and shift their focus to high-impact, mission-driven initiatives.

This e-book explores how finance leaders can move beyond daily operational tasks and lead their organisations to greater mission success.



81% of CFOs believe they are not keeping up with the pace of change well enough³.

Armanino LLP, "CFO Evolution 2.0, The Path to the Transformational CFO," October 2017.

PwC and The Economist Intelligence Unit, "Gut & gigabytes: capitalising on the art of executive decision making," 2014.

Armanino LLP, "CFO Evolution 2.0, The Path to the Transformational CFO," October 2017.

Actionable insights are essential for financial leaders to amplify mission impact

Non-profit finance leaders need to be able to focus on growth for their organisations instead of “accountant and protector” mindsets created by task management.

As a finance leader, streamlining core financial processes is essential to focus on forward-thinking strategy. By automating tasks like bookkeeping, compliance, and risk management, you free up time to integrate your experience with data, trends, and history—driving the organisation toward greater mission success. However, while 77% of senior finance leaders recognise the need for a data-driven finance function, 64% admit their teams are not proactive enough in using data and analytics to resolve critical issues.

To truly lead, non-profit finance leaders need the right tools and enough time to turn data into actionable insights, focusing on strategy and impact. By leveraging data to monitor performance, optimise resource allocation, and assess outcomes, you can ensure every decision moves the organisation closer to its mission. This proactive approach not only drives organisational success but also reduces reactive decision-making, empowering finance leaders to make strategic choices with confidence.

PEOPLE - PROCESS - TECHNOLOGY

LEADER

Forward looking & strategic

Traditional time allocation

25%

Desired time allocation

50%

PROTECTOR

No surprise

Traditional time allocation

20%

Desired time allocation

20%

ACCOUNTANT

Fast & accurate

Traditional time allocation

55%

Desired time allocation

30%

Argyle Executive Forum / Sage Intacct survey, April 2018

Where are you on your journey to **financial leadership 4.0**?

Go real-time with financial leadership 4.0. Purge the clutter from financial processes and pave the path toward mission goals. Forward-looking CFOs have switched to real-time month-end close, data visualisations, and reports – with always-ready presentations and financials. Tap into onhand filings, visuals, board books, and consolidations, with fluid integrations with hundreds of powerful platforms like Salesforce and ADP.

Financial leadership 1.0

- Financial historian
- Backward-looking financial statements
- Too many manual accounting tasks
- Limited reporting and financial visibility

Financial leadership 2.0

- Business analyst
- Cloud financial management
- Real-time reporting and dashboards

Financial leadership 3.0

- Data-driven strategist
- Technology futurist
- Leverage AI insights
- Predictive analytics guide strategic planning

Financial leadership 4.0

- Real-time month-end close
- No-code reports, visuals, and board books
- Rapid integrations unify your process

Finance Transformation Magazine, "Achieving CFO 4.0 with Sage Intacct" Hannah Munro, Q3, 2022.

Data-driven

Becoming a data-driven strategist to maximise your organisation's impact

For non-profit finance leaders to maximise impact, you must transcend financial management and step into the role of a strategic leader by implementing the right people, process, and technology within your non-profit.

By using real-time data to drive decisions, you can not only enhance organisational performance but also experience greater personal satisfaction from focusing on what truly matters: advancing the mission and creating lasting value for their organisation and themselves.



People

Your finance team needs curious, creative, analytical people who will monitor data, identify trends, and hypothesise how to achieve success for the organisation.



Process

The appetite for progress is clear: 81% of CFOs believe there is room for increasing automation to drive further efficiency gains⁶.



Technology

You need three technological capabilities to become data-driven:

1. Automated financial operations
2. Multi-dimensional analysis of key metrics
3. Synchronised data with other systems in real-time

Growthforce, "Why CFOs Are Looking to Automate More," 2022

Automation

Automation unlocks time for strategic impact

With automation, non-profit finance leaders can shift from routine tasks to strategy. That's why 79% plan to invest in process automation with solutions like Sage Intacct to unlock greater impact.⁸

Automation with Sage Intacct empowers finance leaders to lead strategically:

- **78%** are broadening their influence beyond finance.
- **87%** feel pressure to collaborate across functions.

Sage Intacct accelerates efficiency and enables finance leaders to focus on impact by reducing or eliminating the time non-profits spend on tasks such as:

- **Consolidating financial information in Excel** for multi-entity, multi-location, and multi-currency organisations.
- **Calculating revenue recognition in Excel** after compiling project-based time and expense information from sales and HR systems.
- **Performing manual data reconciliations** and manual data re-entry between systems.
- **Calculating allocations using data that doesn't exist** within some traditional accounting systems.
- **Processing supplier payments** and manually routing paper approval sheets.

Organisations are looking to CFOs for strategic leadership:

- **85%** of CFOs believe they will become more involved in strategy and counsel for the overall business.
- **57%** predict a surge in collaboration with other senior executives and board members, indicating a move towards a more cohesive leadership model.
- **60%** foresee a future where their insights will increasingly influence company-wide strategy.
- **59%** of CFOs expect more interaction with the CEO and the board, while 57% predict closer work with CIOs and 55% with CTOs.

CFO.com, "The CFO's changing role: problem-solving, tech and leadership — report" Andy Burt, May 23, 2024

Deloitte, "CFO Signals" Q4, 2022

Leverage multi-dimensional analysis to **drive mission success** and financial performance

Non-profits must track both financial and non-financial performance, such as programme effectiveness and mission outcomes.

Data-driven finance leaders are putting the general ledger at the centre of your data strategy.

By incorporating multi-dimensional analysis, finance leaders can make decisions that balance financial health with mission impact.



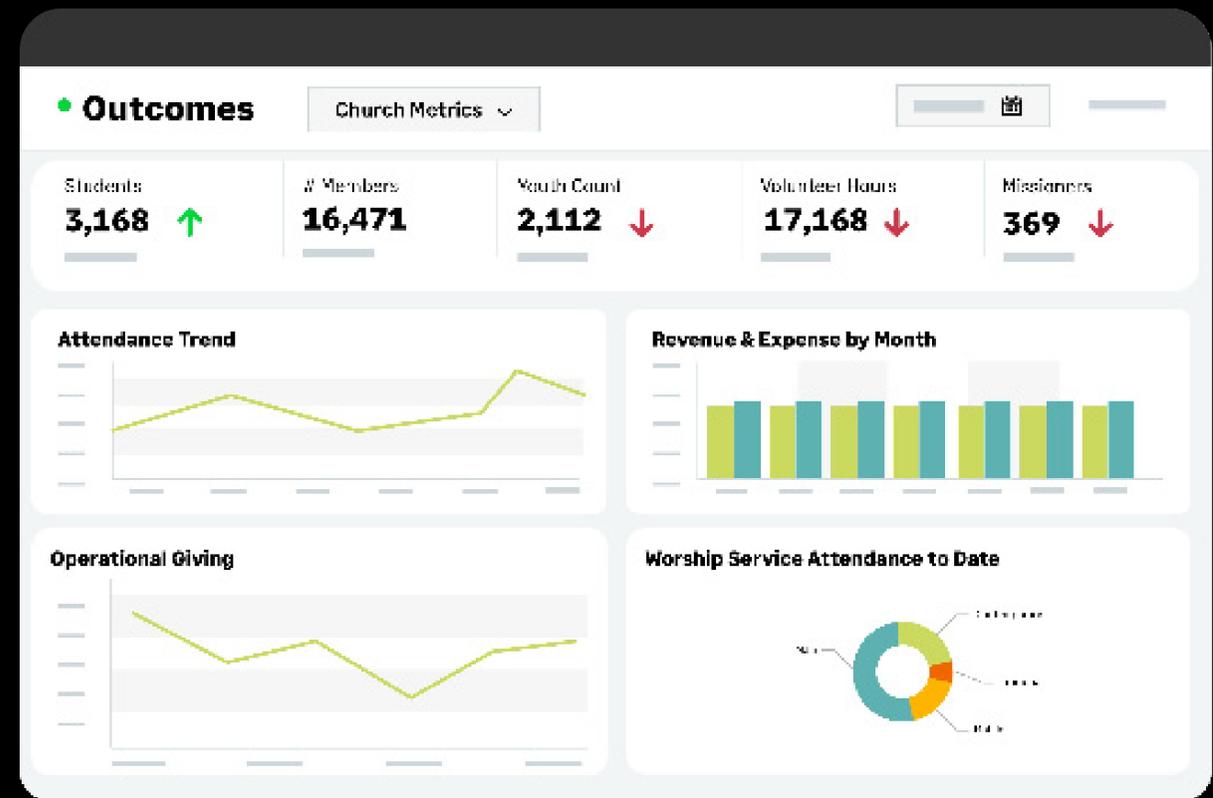
This approach ensures non-profits meet both financial and mission-based goals by tracking key non-financial metrics—such as headcount or labour hours from HR, the number of meals served, patients treated, or educational courses delivered. Integrating donation and funding data from donor management systems can also provide deeper insights into resource allocation and mission success.

Multi-dimensional analysis goes beyond traditional accounting, integrating financial, operational, and programme data for a more holistic view of performance. This approach enables non-profit finance leaders to not only track financial health but also the real-world impact their organisation is making in the community.

Tracking outcome metrics to **measure mission, not just finance**

Statistical accounts in Sage Intacct help track and report on non-financial data to monitor outcomes and impact. This type of measurement allows you to connect your executives, board, funders, and donors with the human side of your mission—whether that impact is measured in patients treated, meals served, or workers trained.

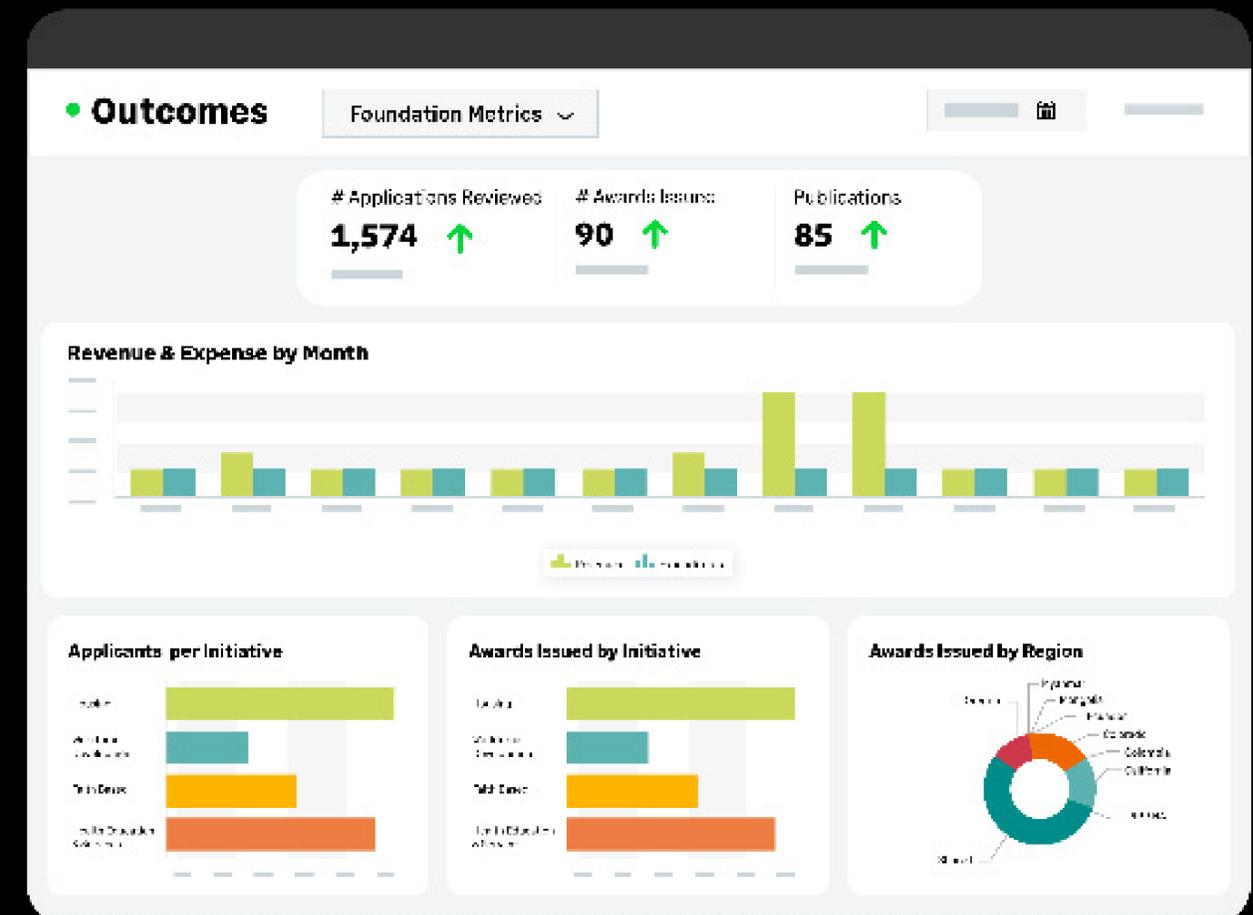
An outcomes dashboard lets you display important financial data side by side with outcomes and compare the real-time data in the current period against prior periods or years. Statistical accounts demonstrate how well your organisation achieves its mission more effectively than traditional financial reports alone.



Visualising your data to communicate mission impact

Data visualisation goes beyond numbers—it helps finance leaders tell the story of your non-profit's impact. With intuitive dashboards and visual reports, you can present your organisation's mission success alongside financial performance.

These visual insights allow stakeholders to see the direct connection between resources and impact, empowering leaders to make strategic decisions that further the organisation's cause.



Pennies raises pounds for good causes with the help of Sage Intacct

“

“It was incredibly easy to link our bank accounts with Sage, I did it in a matter of seconds and the effect has been phenomenal. On the reporting side, the flexibility and intuitive nature of Sage Intacct mean that we’re now just in a different world.”

Peter Nugent,
Finance Director, Pennies



Add dimensions in your **chart of accounts**

Dimensions in your chart of accounts work like labels that help categorise and provide additional context to your financial data.

By adding dimensions, you can easily track, filter, and analyse your financial reports in more meaningful ways—specific to your organisation’s needs. This enables better insights into your performance and supports more informed decision-making.

How dimensions help:

- **Tailored reporting:** View financials by specific programmes, grants, or locations.
- **Efficient analysis:** Quickly sort and filter data to get the insights that matter most.
- **Real-time insights:** Generate up-to-date dashboards to see how your organisation is performing at any moment.

Examples of dimensions for non-profits:

- **Programme:** #MealsServed
- **Volunteer impact:** #VolunteerHours
- **Revenue:** #RevenuePerClinician
- **Courses delivered:** #CoursesDelivered
- **Region:** #MembersInLondon



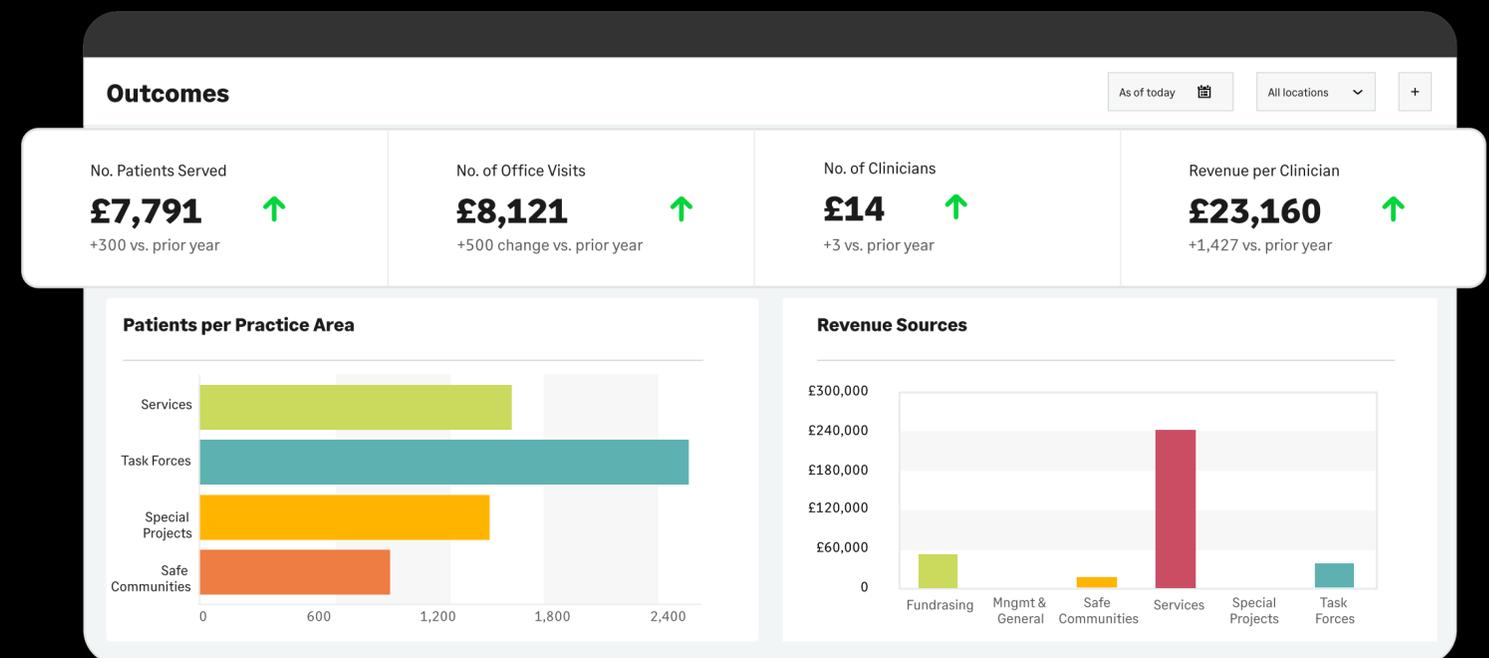
Why this matters:

Dimensions help you align financial reporting with the goals of your mission. They simplify the process of analysing complex data, enabling you to focus on the impact your organisation is making rather than just the bottom line.

Leverage dimensions to slice and dice your data for **maximum visibility**

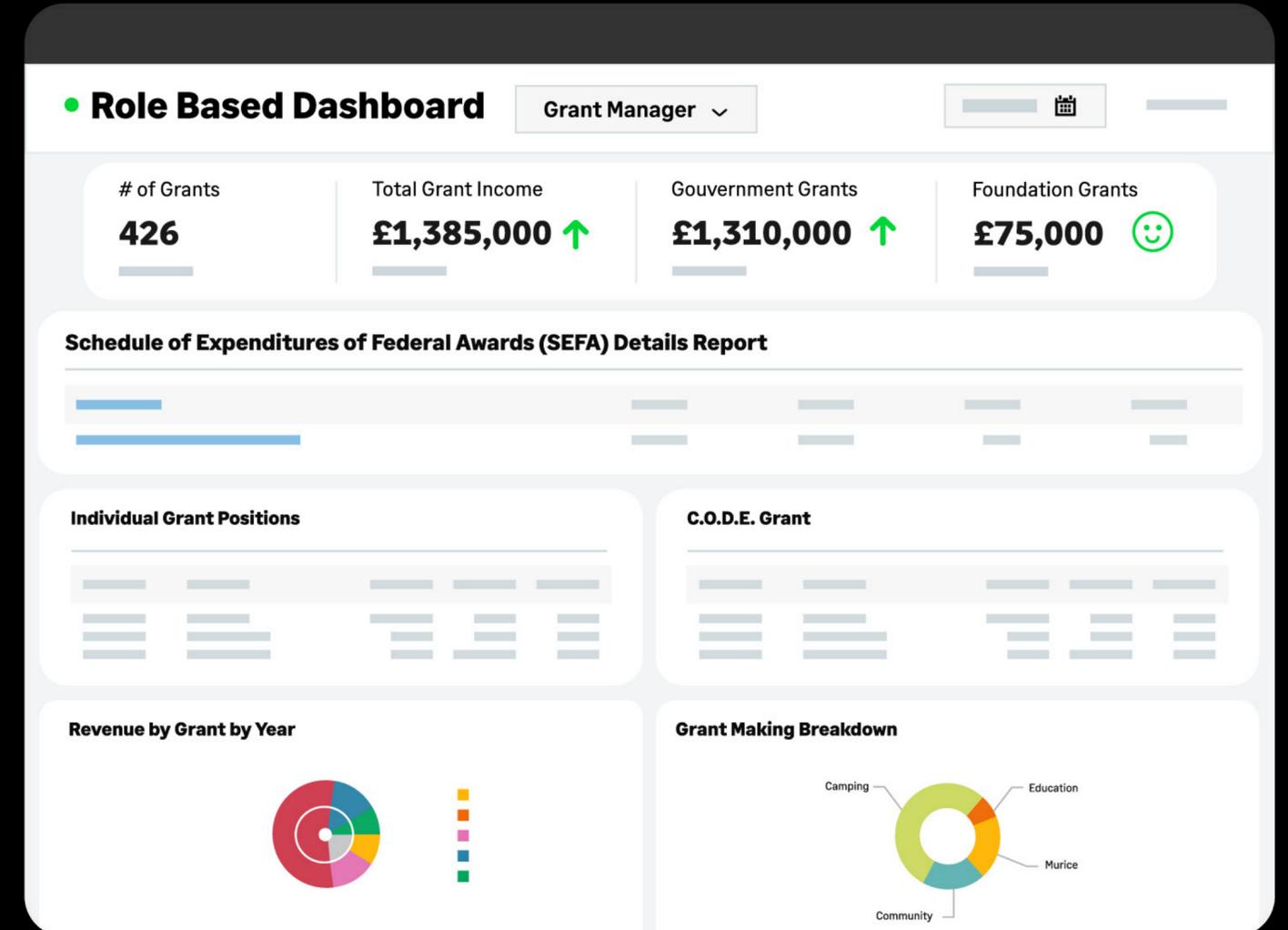
Dimensions allow non-profit organisations to break down their financial and operational data in meaningful ways, such as by programme, location, or funding source.

By leveraging these dimensions, non-profit finance leaders can gain a clearer picture of their mission performance and allocate resources more effectively. This ability to “slice and dice” data helps ensure that financial decisions are directly aligned with the organisation’s mission goals.



Real-time dimensional analysis of **key data**

Build role-based dashboards that put financial and operational metrics at your fingertips. Filter data by any dimension to obtain the key results you need for analysis. Take in the high-level view, then drill down to explore ideas or dig deeper into details.



Sage Intacct grows productivity at East Malling Trust

“

Sage Intacct has halved the time. It used to take me 16 hours every quarter to do our partial exemption VAT return ; using Intacct, it now only takes me 8 hours once a quarter.”

Karyn Hood

Management Accountant and Company Secretary, East Malling Trust



System integration

Real-time data to drive mission success

Sage Intacct makes it easy for non-profits to integrate data from multiple sources, providing more informed analysis and decision-making.

By centralising your data, non-profit finance leaders gain real-time, actionable insights into both financial performance and mission impact. This comprehensive view allows for faster, more informed decisions, optimising the organisation's effectiveness while reducing workload and enhancing overall fulfillment.

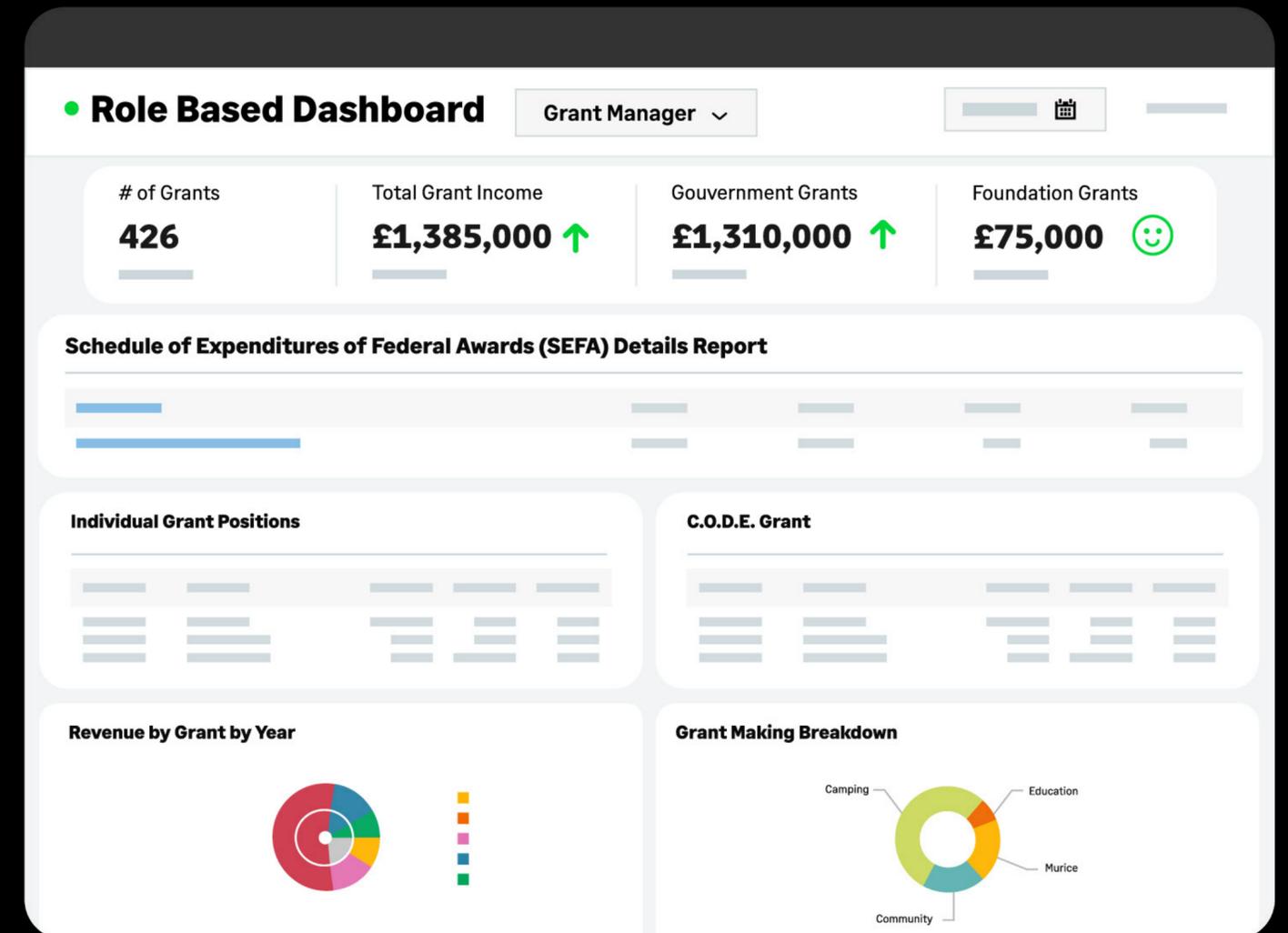
Our open API seamlessly integrates business applications, eliminating redundant data entry and manual reporting. This not only saves time but also empowers finance leaders to leverage integrated data for deeper strategic insights and decision-making that drives mission success.



Real-time dashboards provide instant visibility into mission performance

After all your data is integrated, view key metrics from each application in real-time on a dashboard.

With Sage Intacct, finance leaders can leverage real-time visibility through intuitive dashboards, moving beyond reactive decision-making. These dashboards provide actionable insights by displaying key metrics in real-time, helping leaders proactively guide their organisations and ensure decisions are aligned with long-term growth and success.



The Royal Foundation of St Katharine gains financial serenity with Sage

“

“Previously, if a manager queried some of the figures it would take a lot of digging and looking back through Excel to find the discrepancy; now, the ease at which we can drill down into the numbers within Sage Intacct makes it so much faster to uncover any problems and better support the senior managers.”

The Reverend John Irwin

Finance Director, Royal Foundation of St Katharine



Data-driven non-profit finance leaders **drive** **greater mission** **impact**

Using Sage Intacct, non-profit finance leaders were able to free up time to be more strategic and make impactful decisions. Here are some ways their organisations benefitted.

Tactical

- 60% faster time-to-close
- 78% faster stakeholder reporting
- Board book in minutes
- Real-time access to financials

Strategic

- 40% increase in donor or client base
- 20% growth in new grant funds
- Millions increase in cash flow
- 35%-75% efficiency increase benefiting programs



Conclusion

Take the lead in financial leadership 4.0

The pace of evolution in technologies like artificial intelligence (AI) and analytics is quickly accelerating.

The efficiencies of real-time financial leadership are here today. How much time could you save with real-time month-end close, no-code reports, visuals, consolidations, and board books? How much more productive can your team be with fluid integrations across sales, payroll, and hundreds of other apps?

Sage Intacct delivers financial leadership 4.0. non-profits enjoy:

- **Real-time month-end close** saves your team from inefficient ebbs and flows.
- **No-code reports, visuals, and board books** drive quick insights and always-ready presentations.
- **Rapid integrations** unify your process and eliminate data entry and mistakes.
- **Intelligent General Ledger with AI-powered outlier detection** automatically spots missteps before they can cause damage.



Sage Intacct makes it easier to carve out executive time for focused strategic analysis. With a single source of truth and better visibility across the organisation, you'll be well positioned to take advantage of financial leadership 4.0.

About Sage Intacct

Sage delivers market-leading cloud financial management software that helps non-profits knock down barriers and expand their impact. Trusted by thousands of non-profits, Sage Intacct streamlines fund, grant, and project accounting while delivering real-time visibility into the metrics that matter.

Customers leverage our modern integration tools and visual insights to connect their systems, make better decisions, and automate routine tasks. At Sage, we understand the unique needs of non-profits to help them grow—which is why we're #1 in customer satisfaction on G2.





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