

# Build a Smarter Professional Services Firm with *AI*

April 1, 2026

# Today's *Presenters*



**Tom Maneloveg**  
Business Development

Tom is a Senior Manager at Armanino focused on professional services organizations. Prior to joining Armanino Tom spent 12 years at Sage Intacct leading various sales team including the Professional Services Sales Vertical Team. With a degree in Economics from Washington University in St. Louis Tom started his professional career with a company that provided Production Accounting Services to the motion picture and TV industry working on film and TV locations around the world. Tom is also active in many Armanino foundation events including the Honor Flight and the Challenged Athletes Foundation.



**Annie Evans**  
Director

With 15+ years in corporate finance, FP&A and consulting, Annie brings a positive, collaborative approach to Armanino's clients. She helps organizations leverage Sage Intacct to streamline processes, strengthen controls and deliver meaningful reporting and analytics. Her deep finance expertise and cross-industry experience—spanning construction, real estate, technology and professional services—give her a strong grasp of the challenges leaders face in today's evolving financial landscape. Across every engagement, Annie prioritizes client partnership, quality delivery and timely results.



**Lori Graham**  
Senior Manager

Lori Graham is a Senior Manager at Armanino, specializing in accounting and finance. She helps organizations improve financial performance, increase profitability, and drive sustainable growth. Known for cross-functional collaboration, she delivers strategic, results-driven solutions and leads high-performing teams while building strong, trusted client partnerships.



# Agenda



Armanino  
Professional  
Services  
Overview



Why Armanino  
& Sage Intacct  
for AI



Top Five  
Strategies  
(Deep Dive)



Live Demo



Q&A and Next  
Steps

## Slide 3

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**AP1**

Update

Alexandria Pakalnis, 2026-03-10T13:36:14.273

**SR2**

[@Lori Graham] Slides 4 - 10. Intro, Agenda, Firm overview, Pro Services slides.

Sam Riggio, 2026-03-31T17:41:34.561

# Firm Overview



Employees  
2700+

Team Members in  
41 States

Firm Ranking  
20<sup>th</sup> Largest

Canada  
Vancouver

India  
Ahmedabad  
Hyderabad

<b>California</b> San Ramon Century City El Segundo Irvine Los Angeles San Francisco San Jose Woodland Hills	<b>Florida</b> Boca Raton	<b>Missouri</b> St. Louis St. Charles	<b>Tennessee</b> Nashville
<b>Colorado</b> Denver	<b>Georgia</b> Atlanta	<b>New York</b> New York City Garden City	<b>Texas</b> Austin Dallas
	<b>Idaho</b> Boise	<b>Pennsylvania</b> Philadelphia Scranton	<b>Washington</b> Bellevue
	<b>Illinois</b> Chicago		

WHO WE ARE

## Firm Overview

OUR PROMISE

Armanino delivers **impactful, bold solutions** that **increase clarity and spark success** for today and tomorrow.

*When it comes to your success, we know addressing today's challenges is just as important as planning for the future. Our teams bring deep industry experience to help organizations reach peak performance today, and to help you prepare for the future.*

### Recognition & Awards



# Professional Services Industry Expertise

Armanino supports **1,350+ professional services clients**, helping them manage financial strain, think strategically, and achieve long-term success. We understand the evolving needs of service firms and provide **tailored solutions that drive efficiency, growth, and resilience.**

We collaborate with organizations in accounting, legal, human resources, marketing, publishing, and additional sectors. Our team knows firsthand the challenges these businesses face—from scaling operations to satisfying client demands—and delivers the smartest solutions to their unique tax, accounting, audit, and strategic needs.

With Armanino's breadth of audit, tax, and consulting expertise, professional services firms can streamline operations, respond to client expectations, and build sustainable strategies for the future.



KNOWLEDGE BUILT THROUGH EXPERIENCE

# Professional Services *Industry Expertise*

Professional services firms face constant pressure to balance client expectations, financial management, and operational demands. Many must manage complex financial models, scale their workforce, and adapt to new technologies while maintaining high levels of service. Armanino delivers practical solutions that address these challenges directly, helping firms strengthen operations, reduce inefficiencies, and build sustainable growth strategies. We work with organizations across accounting, legal, human resources, marketing, publishing, and other specialized sectors. By combining deep audit, tax, and consulting expertise with sector-specific insight, we help firms modernize financial processes, adopt scalable technology, and create long-term resilience in competitive markets.



**Law Firms**



**Financial Services**



**Life Sciences**



**Design Services**



**Education & Training**



**Management Consulting**



**Advertising, Marketing, PR**



# Why Armanino For *Professional Services*

## **Deep Industry Expertise**

With experience serving 1,350+ professional services organizations, Armanino understands the unique needs of law firms, architects, consultants, and other service-based businesses.

## **Growth & Scalability Support**

We provide strategies that evolve with your business—helping you manage growth, optimize cash flow, and implement systems that scale as your firm expands.

## **Specialized Compliance & Advisory**

Our professionals bring in-depth knowledge of tax, audit, and regulatory requirements specific to the professional services sector, ensuring your business stays compliant while minimizing risk.

## **Technology-Enabled Solutions**

We leverage best-in-class tools and data-driven insights to modernize operations, improve efficiency, and give you the transparency you need to make confident decisions.

# Pain Points

At Armanino, we recognize that professional services firms face increasing pressure to deliver value, manage rising costs, and adapt to a rapidly evolving market. We help you navigate these challenges with tailored strategies that enhance profitability, streamline operations, and provide the insights you need to strengthen client relationships and ensure sustainable growth.



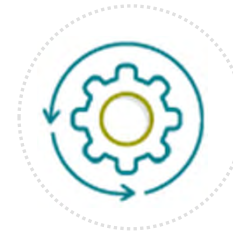
## Resources & Talent Pressures

Shrinking talent pools, compressed deadlines, and high turnover limit firms' capacity to scale and compete



## Compliance Complexity

Growing regulatory scrutiny and evolving ESG/sustainability expectations add cost and operational strain



## Operational Challenges

Misalignment with outsourced providers and the constant need to balance billable hours with efficiency.



## Evolving Client Demands

Clients expect advanced technology, real-time insights, and consistently high-value service delivery.

# The *AI-Driven* Professional Services Evolution

# Two Flavors of AI: *Agentic vs.* *Generative*

If GenAI is your brainstorm partner,  
**Agentic AI** is your best employee.

One **thinks** with you. The other **acts** for  
you.

## **Creative Intelligence**

Supports innovation by generating  
new ideas, content or solutions

## **Context-Driven Content Creation**

Produces written, visual or data  
summaries from prompts

## **Human-Like Personalization**

Tailors responses to fit audience,  
tone and context

## **Goal-Oriented Automation**

Executes tasks with clear  
objectives, often with minimal  
human involvement

## **Task & Workflow Execution**

Follows defined workflows to  
complete repetitive, high-volume  
processes

## **End-to-End Process Automation**

Manages complex operations from  
input to action

# The ERP Evolution

- ERP journey: On-Prem → Cloud → Connected → Intelligent (AI-Embedded)
- ERPs evolved from transactional to intelligent platforms
- Sage Intacct leads the shift from data entry to data-driven decisions
- AI now acts as a co-pilot, not just a reporting tool



# AI for *Finance Leaders*

“AI turns data into decisions.”

1

Accelerate close cycles

2

Improve forecasting accuracy

3

Deliver real-time insights with  
fewer manual steps

# The Human + Machine Workforce

- AI augments decisions, not replaces them
- Finance pros become AI supervisors
- Start small to scale adoption
  - Copilots
  - Smart Use Cases
- Armanino **AI Readiness Programs** enable adoption



# Choosing the Right Platform

## *Why Sage Intacct*

- ✓ Deep multi-dimensional accounting & automation for efficient financial operations
- ✓ Multi-entity consolidations
- ✓ Only ERP Platform endorsed by the AICPA
- ✓ Sophisticated visibility for real-time decision making
- ✓ Best-In-Class, open API's for easy integration to other solutions
- ✓ Fresh & modern user interface
- ✓ Designed for finance teams looking for a powerful solution but with ease of use



### Centralize Business Management in One Platform

Simplify accounting processes, expense tracking and financial reporting



### Eliminate Data Re-Entry

Reduce errors and save 40+ hours per month with automated reporting



### Maintain Compliance and Minimize Risk

Improve data accuracy and transparency to mitigate your regulatory risks



### Integrate With Existing and Future Systems

Sync portfolio management, expense tracking and payroll systems to boost data reliability



### Boost Decision-Making With Real-Time Insights

Support decisions with verified, easy-to-access data on investments, expenses and budgets



### Elevate Collaboration With Teams and Stakeholders

Enhance communication with real-time dashboards that centralize operational and financial metrics



# Where AI is Enabled in Sage Intacct

- **General Ledger**
  - Sage Intelligent GL – anomaly detection, natural language queries
- **Accounts Payable**
  - AI invoice capture, GL coding, fraud detection
- **Accounts Receivable**
  - ML-based cash application, payment prediction
- **Planning & Forecasting**
  - Predictive modeling in Sage Intacct Planning
- **Analytics**
  - Ask Sage insights and automated narrative reports

# *Five* Strategies for Success

With Sage Intacct and Armanino as Your Implementation Partner and AI Experts

STRATEGY 1

# AI-Powered Data *Integration*

1

Connect **PSA, ERP, CRM**  
and billing systems

2

AI-driven connectors for  
**seamless data flow**

3

**Single source of truth**  
for financial data

4

Outcome: **Faster** audits  
and **fewer**  
reconciliations

STRATEGY 2

# Intelligent Time & Expense Capture

- AI-assisted time entry from calendars and transcripts
- Automated expense coding and fraud detection
- Real-time capture during meetings
- Outcome: eliminate revenue leakage

STRATEGY 3

# Smart Billing & Revenue Recognition



**AI-driven** billing  
recommendations



**Automated** compliance  
checks (ASC 606)



**Dynamic** adjustments for  
contract changes



**Outcome:** predictable  
cash flow

STRATEGY 4

# Generative AI for Forecasting & Advisory

- Forecast demand and resource allocation
- Predict profitability and risk
- Generate advisory insights for pricing decisions
- Outcome: Data-driven growth

STRATEGY 5

# Real-Time Insights & *Predictive Dashboards*

1

AI-powered KPI  
dashboards for  
Executives, Managers  
and PMs

2

Predictive alerts for  
margin erosion

3

Drill-down to project-  
level details

4

Outcome: Proactive  
decision-making

# *Sage Intacct* Roadmap

NOW / NEAR TERM 2025

# Sage Intacct Roadmap Highlights

## 1 ENHANCED AP AUTOMATION

Extending AI across the full Accounts Payable workflow—from bill capture, coding, PO matching to payments, aimed at saving hundreds of hours.

## 3 CASH FLOW PREDICTION & OPTIMIZATION

Predictive forecasting of cash based on AR/AP trends, vendor payment, helping finance leaders manage liquidity proactively.

## 5 GENERATIVE & NATURAL LANGUAGE UX ENHANCEMENTS

Features like “Ask Sage” or context-aware natural language search and help inside the product.

## 2 CLOSE WORKSPACE

A centralized hub inside Sage Copilot that tracks customized close-tasks, surfaces bottlenecks and suggestions to accelerate the close process.

## 4 CONTINUOUS ASSURANCE / RECONCILIATION AUTOMATION

Features like the “Subledger Reconciliation Assistant” that monitors subledger vs GL, flags discrepancies automatically.

## 6 DEVELOPER & INTEGRATION TOOLS FOR COPILOT

Tools and APIs that allow building custom AI-driven workflows and integrations on top of Sage Copilot for Sage Intacct.

# *Live* Demo

Bringing AI-Driven Automation to Life

# You Can't Spell Armanino Without "AI"

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## Slide 26

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**SR1**    [@Lori Graham] wrap up slide - can just say thank you for joining and reach out to us with any questions.  
Sam Riggio, 2026-03-31T17:40:29.904

**LG1 0**   yes, will do  
Lori Graham, 2026-03-31T23:07:53.129

# Armanino Operates in an Alternative Practice Structure:

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“Armanino” is the brand name under which Armanino LLP and Armanino Advisory LLC, independently owned entities, provide professional services in an alternative practice structure in accordance with law, regulations, and professional standards. Armanino LLP is a licensed independent CPA firm that provides attest services, and Armanino Advisory LLC and its subsidiary entities provide tax, advisory, and business consulting services. Armanino Advisory LLC and its subsidiary entities are not licensed CPA firms.

