

## Success Story

# Higginbotham grows fivefold without adding headcount thanks to Sage Intacct

Fast-growing insurance firm modernizes finance to power rapid, acquisition-led expansion

“We’ve grown five times and haven’t added headcount.”

**Tony Haas**

Chief Accounting Officer, Higginbotham



### The challenge

With rapid nationwide growth and increasing acquisitions, Higginbotham’s outdated financial tools couldn’t keep pace. Manual processes, limited GL capabilities, and siloed systems hindered scalability, slowed compliance, and made strategic insight increasingly tough.



### The solution

Sage Intacct provided a flexible, cloud-based financial platform with multi-entity support, strong automation, and deep integration options. It enabled centralised control, seamless third-party connectivity, and intuitive reporting to support strategic decisions.



### Results with Sage Intacct

Since implementing Sage Intacct, Higginbotham has maintained finance headcount while scaling 5x, managing over 130 acquisitions, and dramatically reducing reporting and distribution times—all while improving compliance, stakeholder reporting, and forecasting accuracy.

- Reduced reporting from 3 days to 3 hours.
- Managed 130+ acquisitions with lean finance team.
- Enabled compliance across multi-entity structure.
- Scaled operations 5x without increasing team size.



**Company**  
Higginbotham

**Location**  
Texas, US

**Industry**  
Insurance

**Sage Products**  
Sage Intacct



**Higginbotham™**

### About Higginbotham

Higginbotham is one of the largest independent insurance brokers in the US, with operations spanning over 17 states and 130+ acquisitions.



### **Old world software clashes with high-speed growth**

For a company growing as quickly as Higginbotham, maintaining pace without breaking process is essential. The business had outgrown the limited general ledger tools within its agency management system, software that Tony Haas, Chief Accounting Officer, describes as “1980s technology.”

“The vendor payable module was about the equivalent of a checkbook,” Haas explains. “It was just very antiquated.”

The GL limitations, manual workflows, and lack of integration left the accounting team overburdened. “Our executive management is not going to slow down,” Tony says. “So, we had to figure out how to update our processes in order to keep up.”

At the same time, the pace of acquisitions was accelerating, and the business was expanding into new, non-core service areas, from HR consulting to pharmacy benefit advisory. With each new acquisition adding complexity, the need for a scalable, modern financial system quickly rose to the top of the agenda.

### **Cloud-first finance for a complex business**

After evaluating several platforms, Higginbotham chose Sage Intacct for its cloud-native architecture, third-party integration capabilities, and cost-effectiveness.

“We knew we needed a cloud-based system,” says Tony. “Something that worked for remote teams, was easy to access, and integrated well with third-party products.”

Implementation went smoothly, supported by Sage consultants and advice from fellow users. “We heard from several people: make sure your setup is right. That made all the difference,” he adds. The result was a powerful foundation that began showing value early and continues to support the business as it scales.



Automation in Sage Intacct is helping Higginbotham shift from manual processes to proactive, strategic finance.

### Growth without growing payroll

Since adopting Sage Intacct, Higginbotham has scaled revenue fivefold, without increasing vendor payable headcount. “We had three or four people handling AP before, and we still do today. We’ve grown five times and haven’t increased the staff at all,” Tony says.

That level of efficiency meant the team didn’t have to grow under the weight of the business—it grew around them instead.

That growth includes more than 130 acquisitions since 2007, with plans to close 20 more each year. And with every new acquisition comes a wave of compliance demands, reporting deadlines, and integration challenges. “If we didn’t have Sage Intacct, we wouldn’t be able to track our compliance reporting nearly as efficiently,” he adds.

### No chaos in consolidation

The ability of Sage Intacct to manage multiple books and dimensions has been instrumental in maintaining visibility across a diverse, growing portfolio. “We have a pro forma book to keep track of all our acquisitions,” says Tony. “That lets us see what we’re really growing organically.”

Corporate Controller Robert O’Byrne adds, “Day one after an acquisition, there’s a real reporting need. Sage Intacct gives us the flexibility to consolidate financial information without disrupting the agency’s existing systems.”

Whether integrating HR services or managing captive insurance entities, Sage Intacct enables consistent reporting, even when every acquisition is different. “Flexibility in a fast-changing environment has been invaluable,” says Robert.

### Automation that frees up time for strategy

Automation in Sage Intacct is helping Higginbotham shift from manual processes to proactive, strategic finance. “What used to be a three-day process now takes a couple of hours,” says Tony, referring to internal equity distributions. “That’s a major improvement.”

Carrie Bird, Accounting Manager, sees a similar impact in day-to-day tasks. “Some of these journal entries have 100-line items. It takes five minutes, max,” she says.

Beyond time saved, the system empowers the team to add more value. “The time Sage Intacct saves me, I invest back into coaching my team,” Carrie explains. “That’s how we stay ahead—and keep raising the bar.”



**“We wouldn’t have been able to grow this fast without Sage Intacct.”**

**Carrie Bird**

Accounting Manager, Higginbotham

**A comforting constant in a company that never stands still**

As Higginbotham continues its trajectory, stability in financial reporting has become a strategic advantage.

“Sage Intacct is our constant,” says Robert. “Every day brings new challenges. Having one reliable system lets us perform under pressure—that’s huge.”

The business is also looking ahead to areas like sustainability and advanced forecasting. “We just reached out to Sage about carbon accounting,” says Tony. “And the planning and analysis tools will be important as we move forward.”

From entity-level reporting to system-wide integration, the platform’s usability is proving just as important as the company continues to grow. “It’s so intuitive,” says Carrie. “New team members pick it up quickly, which makes a big difference in a company growing this fast.”

Higginbotham’s story proves that with the right systems, finance can move fast, stay sharp, and lead from the front.



Sage

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