

## Success Story

# IRG go from Excel to excellence with Sage Intacct

Automation and real-time insights help real estate firm scale without expanding its finance team

“If somebody asked me about Sage, I could shout from the rooftops how great they’ve been for us.”

### Rebecca Smith

VP & Director of Corporate Accounting, IRG Realty Advisors



### The challenge

IRG's Excel-heavy financial workflows couldn't keep pace with national growth. The team faced frequent errors, reporting delays, and increasing pressure from leadership.



### The solution

Sage Intacct delivered automation, dimensional reporting, and dynamic allocations, reducing manual work and creating trusted, self-serve insights.



### Results with Sage Intacct

IRG simplified processes, improved data quality, and freed up the finance team to support strategic decisions, all without growing headcount.

- 33,000 invoices automated each year.
- Reduced cash application time by 90 percent.
- Streamlined allocations and reporting.
- Scaled nationally without new finance hires.

# Sage

### Company

IRG Realty Advisors

### Location

Ohio, US

### Industry

Property – Real Estate

### Sage Products

Sage Intacct



### About IRG Realty Advisors

A national, full-service real estate firm managing over 100 million square feet across 35 states, supporting clients from acquisition to operations.



### **Crashing spreadsheets and rising pressure**

Founded in 2001, IRG Realty Advisors began with a handful of Ohio-based properties and fewer than 10 employees. After being acquired by their largest client in 2013, the company expanded rapidly, managing properties across 35 states and growing to over 100 million square feet of space. However, the tools supporting their finance operations weren't evolving at the same pace.

"We were using a real estate-focused system that wasn't built for running a business," says Rebecca Smith, VP and Director of Corporate Accounting. "As we grew, we had to force it to work. Eventually, we became heavily reliant on Excel."

Spreadsheets ballooned in size and complexity. Formulas would crash, accuracy became a concern, and reporting cycles risked becoming sluggish. "We were constantly double and triple-checking everything, and still errors made it through," Rebecca says. "It created anxiety. We wanted to hand off a pristine product, but the tools weren't supporting that."

With executives needing timely, reliable data to make quick and informed decisions, the team was at a crossroads. "We either needed to double our team to keep doing it manually or invest in a platform that could scale with us."

### **A finance platform that proves its point**

Working with Gartner, IRG evaluated several software providers, but only one made a lasting impression. "The Sage team took our actual Excel files and recreated them in the system," Rebecca recalls. "They showed us dynamic allocations, dimensions, how we could tie everything together. I realized, this is it. This is what we need."

IRG decided to implement Sage Intacct with the support of the internal team at Sage. "It was more cost-effective, and we could get started faster. Our implementation lead had an accounting background. When we discussed reporting or service lines, they understood exactly what we meant."

Training sessions were recorded, and the team stayed on track and under budget. "They didn't just deliver a system," Rebecca adds. "They made sure we understood it, from setup to reporting. They wanted us to succeed—and we did."





"Sage Intacct has helped us automate where it counts, so our team can focus on analysis."

### **Doing more, hiring less**

IRG processes over 33,000 invoices and 11,000 customer checks a year. With Sage Intacct, the team has absorbed that growth without increasing headcount.

"Just on the cash application side, we've saved days of work," Rebecca says. "It used to take four to six hours every week. Now it takes about thirty minutes."

By using imports, dynamic allocations, and reporting automation, the team reclaimed valuable time—and reduced risk. "We're not worried about Excel crashing the night before a meeting anymore. We know our numbers are accurate. That's a huge relief."

CFO and COO Mark Miley agrees. "Sage Intacct has helped us automate where it counts, so our team can focus on analysis. That's allowed us to push for more accountability, deliver deeper insights, and support faster decision-making."

### **Insights for back office and building sites**

IRG's finance transformation didn't stop with speed or automation. With Sage Intacct, the team is now enabling better decisions across the entire organization.

"Our department heads are experts in construction, leasing, environmental consulting—not accounting," says Rebecca. "You can't just give them a balance sheet. But now we can present the data in a way that makes sense to everyone. You have the ability to slice and dice this data so many different ways so that the audience that you have is getting the information that they need."

Whether it's showing the financial impact of staffing changes, guiding service line growth, or analyzing cost trends, the reporting flexibility within Sage has made the difference. "We can build reports that speak their language. That's how you drive understanding and action."

For IRG, financial insight is no longer limited to the back office. "We can now partner with our service line leaders," Rebecca says. "They see how their work affects the wider business, and they're part of the conversation."

### **Allocations that bring clarity**

Before Sage, allocating overhead across departments was a slow, manual grind. "We were using Excel for everything—even budgets," says Rebecca. "It was mind-numbing and prone to mistakes."

With the dynamic allocations of Sage Intacct, IRG built custom allocation models for both actuals and budgets, something the platform wasn't originally designed for. "We worked with Sage to make it happen, and it's worked beautifully."

Now each department receives a direct profit and loss statement, plus visibility into their share of corporate overhead. "It's made everything more transparent," says Rebecca. "They get it. They see how they fit into the bigger picture. That's been a breakthrough."



“We’ve grown, we’ve saved time, and we haven’t had to hire. That’s Sage.”

**Mark Miley**

CFO & COO, IRG Realty Advisors

**Planning with confidence**

For IRG, Sage Intacct has delivered more than efficiency. It’s provided clarity, trust, and a foundation for growth.

“We’ve grown every year,” says Rebecca. “And Sage is a huge part of how we’ve managed that. It’s flexible. It scales with us. It helps us be better.”

Mark sees it the same way. “Sage has allowed us to slice data in more meaningful ways, report with accuracy, and analyze department profitability. That’s how we make strategic decisions on people, pricing, and service delivery.”

The flexibility of Sage also provides a path forward. “If we need to bring property accounting into Intacct or support new business units, we can,” Mark says. “It’s reassuring to know we have a platform that’s ready for whatever’s next.”

Rebecca adds, “From a high-performance standpoint, you can’t be afraid to be that accountant who wants to think outside the box. The numbers aren’t going to change, but how you look at them might.”

“Sage is my superpower. It’s helped my team reduce stress, improve accuracy, and feel empowered. I know who to call—that’s what makes it a real partnership.”

**Sage**





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