



Workpower

CASE STUDY

Workpower Sage Intacct Implementation Success Story

How Sage Intacct's powerful platform, combined with PBT's tailored implementation, delivers real-world results that streamline operations and drive measurable business improvements.

Introduction to Workpower

Workpower is one of Western Australia's largest and longest-standing social enterprises, dedicated to empowering people with disabilities. Across 17 locations, the organisation delivers an impressive range of services from timber manufacturing and packaging to recycling, environmental services, disability employment, and community support.

Having multiple outdated ERP systems in use across the group and an aging entry level finance solution, the organisation was struggling with inefficient processes, multiple data bases, and disjointed operational and financial reporting. CFO Cerena Moir recognised that to continue growing and serving their community, they needed a modern, unified financial management system.

"We faced significant challenges in financial reporting, manual data entry, and integration challenges across our various business units. With so many different services to oversee, the organisation required a modern, scalable financial management system to support its growing operational needs, streamline processes, and meet industry-specific requirements."

Cerena Moir, CFO, Workpower

The Solution: Implementing Sage Intacct with PBT

After a thorough market evaluation, Workpower selected Sage Intacct, a best-in-class, cloud-based ERP solution. They partnered with Progressive Business Technologies (PBT) to deliver a full-scale transformation, replacing their outdated systems, streamlining workflows across sales and purchasing, and integrating critical operational platforms.



Implementation Approach:

Workpower's successful transition to Sage Intacct was underpinned by a structured, collaborative implementation approach led by PBT. From the outset, PBT applied its proven project delivery framework, combining deep product knowledge with change management best practices and strong governance disciplines.

Key aspects of the implementation included:

Solution Design: Collaborative workshops were conducted to align Sage Intacct's capabilities with Workpower's operational and reporting needs across diverse service areas.

Prototype Establishment: A working prototype was configured, enabling stakeholders to visualise processes, validate configurations, and build confidence early in the project.

Business Process Testing: Real-world scenarios were tested to ensure the solution handled day-to-day operations efficiently, and to fine-tune workflows ahead of deployment.

User Training: Comprehensive training sessions equipped staff across finance and operations with the knowledge needed to confidently adopt the new system.

User Acceptance Testing (UAT): End users participated in structured UAT to validate system readiness and ensure alignment with organisational processes and controls.

Go Live: The system was deployed in a coordinated go-live, supported by PBT to ensure a smooth transition and minimal disruption.

This approach ensured the project stayed on track while allowing Workpower to embed lasting operational improvements beyond the technology rollout.

"PBT brought a clear, structured implementation approach that kept us aligned from day one. Their support extended beyond the system, they helped us enforce project disciplines, manage change across our teams, and embed the right practices for lasting success."

Cerena Moir, CFO, Workpower



Key Outcomes and Highlights

Powerful Financial Reporting

With Sage Intacct's dimension-driven architecture, Workpower achieved real-time financial visibility across all 17 locations and service lines. Tracking dimensions like Site, Program, Project, Service line, and Funding source now takes minutes, not hours, supporting faster, smarter decision-making. This reduced month-end reporting times and gained real time access to accurate, detailed financial insights at the click of a button across all business units.

Strategic System Integrations

MYP Care Management Integration

PBT integrated Sage Intacct with Workpower's care management system, MYP, automating the flow of NDIS client invoicing data. This reduced manual data entry, improved billing accuracy, and streamlined compliance reporting.

Simpro Field Services Integration

Sage Intacct was also integrated with Simpro, Workpower's operational software for fire services, automating the syncing of client and invoice data. This eliminated duplication, improved data consistency, and enhanced the link between service delivery and finance.

Together, these integrations slashed administrative effort and ensured consistent, accurate data across systems.

Streamlined Sales and Purchasing Workflows

PBT worked with Workpower to improve operational workflows on both the sales and purchasing sides of the business.

On the sales side, Sage Intacct's Sales Order Management tools allowed Workpower to:

- Streamline order creation and tracking.
- Link orders directly to inventory and invoicing.
- Improve visibility over order status and delivery timelines.

This Improved control over customer commitments, faster order processing, and more accurate financial reporting tied to sales activities.



On the purchasing side, PBT introduced structured approval workflows:

- Automated purchase approvals based on manager authority.
- Full visibility into organisation-wide purchasing.

These controls strengthened governance over spending, improved visibility into purchasing activity across all business units, and ensured policy compliance, all while simplifying processes for staff.

The combined improvements across sales and purchasing created a more connected, efficient operational environment, reducing bottlenecks and aligning Workpower's finance and operations teams more closely.

Smarter Inventory Management

Some of Workpower's business units require stock management. For these, PBT implemented inventory control and assembly management capabilities within Sage Intacct. This has enabled Workpower to track stock movements, manage simple assemblies, and integrate inventory transactions directly with financials, improving stock accuracy and cost tracking.

Project Outcomes and Measurable Benefits

The Sage Intacct implementation delivered transformational outcomes for Workpower, significantly enhancing both financial and operational processes:

- Substantial reduction in manual data entry, allowing finance and operational staff to focus on more strategic and value-adding activities.
- Marked improvement in data accuracy across invoicing and operational reporting, leading to more reliable financial insights.
- Real-time financial reporting rolled out across 17 business units, significantly streamlining the month-end close process.
- All purchasing activities now governed by automated approval workflows, strengthening compliance with procurement policies and internal budget controls.
- Seamless integration with key external systems (MYP and Simpro), eliminating redundant data handling and promoting consistent, centralized data management.
- Overall, the organisation experienced a notable uplift in operational efficiency across the organisation in the initial months following implementation.



Leadership and Collaboration

“Cerena’s leadership was instrumental to the success of this project. She wasn’t just a project sponsor, she was an active change leader who set the tone for engagement, accountability, and collaboration across the organisation. Her ability to embed governance, drive momentum, and support her team through change made this project a success.”

Sherry Herman, Project Leader, PBT

Workpower’s Sage Intacct transformation showcases the power of the right technology, when combined with the right partners and visionary leadership, can drive remarkable transformation. Today, Workpower stands better equipped than ever to deliver exceptional services to the community, with a strong, scalable foundation for future growth.

Successfully Implement Sage Intacct with PBT

Seamless setup.

Expert support.

Increased **Efficiency**.

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