

E-book

Ai for SaaS CFOs:
THE STRATEGIC GUIDE
TO SCALABLE GROWTH
& EFFICIENCY

Sage



The Changing Role of the **SaaS CFO**

Outpacing the competition, instilling investor confidence, and securing funding for the next stage of growth—the demands on today's SaaS CFOs are numerous, and addressing them requires responsive, flexible leadership.

The role of the SaaS CFO is undergoing a profound transformation—evolving from a traditional financial steward into a strategic, cross-functional leader. Research by Sage has found SaaS finance leaders' responsibilities have expanded significantly beyond core finance tasks, with many playing a central role in HR collaboration, digital transformation, and long-term strategic planning.

But as their influence grows alongside the business, CFOs may find their existing management solutions can't keep up. To lead effectively, SaaS finance leaders need real-time access to data and insights that support a high-performance finance function, help maximize working capital, and guide confident investment decisions.

They also require scalable compliance and risk mitigation tools to manage increasingly complex operations. And they need the ability to make fast, informed decisions—not based on instinct, but on live, trusted data.



Today, too many SaaS finance leaders are still struggling to:

- Integrate their financial management solutions with broader business tools, leading to workflow disruptions and a lack of unified visibility across the organization.
- Make strategic decisions and overcome a lack of real-time data, especially in times of growing economic uncertainty.
- Reduce the burden of manual, repetitive tasks, which impacts team morale, work-life balance, and the ability to attract and retain top talent.

The rise of AI

Artificial intelligence is transforming financial management across industries. For SaaS companies, the real benefit of AI lies in its ability to rework every manual process and workflow in the finance function. Ultimately, AI solutions are strategic enablers, and the successful integration of AI tools promotes faster, more intelligent, more effective ways of working across the business.

SaaS leaders face increased pressure to keep pace with their early-adopter peers and reap the benefits of AI solutions to promote ongoing growth. Sage 2025 CFO Survey found 77% of SaaS CFOs feel they aren't fully capitalizing on AI-powered tools—and one in two finance leaders say they would struggle to identify the right solutions to invest in.

It's evident that while the top-performing CFOs are well aware of the benefits they stand to gain from proactive AI integration, there are some who struggle to conceptualize the route to implementation or visualize the full suite of ways that AI tools can support their growing businesses.

The Sage promise

Sage brings over eight years of experience delivering AI solutions, training 35,000 AI models daily and generating 1.2 billion predictions each year. This guide combines that deep AI expertise with a proven track record of supporting SaaS companies at every stage of growth—including those that have successfully raised millions in funding rounds.

Inside, you'll discover how to unlock new business insights, automate critical workflows, forecast with greater accuracy, and lead more strategic financial management.



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Streamline operations & automate **core finance** processes

The customer lifecycle in SaaS is complex. Finance teams often manage billings, revenue, and cash flow using manual processes that leave little time for strategic thinking and development. This stifles growth and forces time-strapped teams to spend valuable hours maintaining the status quo—while CFOs are pulled away from future planning to manage day-to-day disruptions.

An impactful CFO doesn't just solve operational inefficiencies, they drive outcomes by:

- Driving sustainable revenue growth.
- Reducing customer and talent churn.
- Improving the efficiency of customer acquisition.
- Directing product development.
- Maximizing customer profitability.
- Delivering metrics to secure investment.

AI tools are a clear route to achieving these results. How? Well, in finance teams, AI tools can be used to support staff at all levels, automating core processes and streamlining existing operations to unlock new efficiencies. When staff are no longer locked into roles requiring manual, repetitive input, their skills can be put to use in more strategic ways—such as improving customer acquisition and spotting opportunities to grow the business.

Fuel financial impact with Sage Ai

CFOs and finance leaders in the SaaS industry should look to leverage AI-powered tools from providers with a proven track record of delivering real impact across the finance function.

Key requirements, such as the ability to reconcile accounts automatically, allocate expenses, and recognize revenue could provide the basis for further improvements—so long as your chosen solution is capable of integrating with your existing applications.

Sage Ai

- Automates manual workflows with tools such as AP automation, meaning customers achieve 95% accuracy in vendor matching and cut processing time in half.
- Learns your invoice formats, leveraging the power of the Sage Network to increase speed while maintaining human oversight.
- Improves AP invoice entry productivity by at least 40%.
- Automatically classifies general ledger codes, matches purchase orders, and flags errors with Sage Copilot.
- Increases capacity without increasing headcount, so your team can focus on more strategic work. This also improves morale.



Boost visibility with real-time intelligence

Increased efficiency supports growth and scalability—and AI-powered tools can help achieve that—but another, sometimes overlooked contributor is data intelligence.

With real-time data at their fingertips, SaaS CFOs can move beyond reporting to actively shaping business strategy. They gain deeper visibility into financial health, uncover growth opportunities as they emerge, and guide the business with greater confidence. Rather than simply reacting to market shifts, today's high-performance finance leaders are using AI-powered insights to anticipate change, influence outcomes, and drive sustained performance.

AI tools follow a model of continuous improvement, which in turn means the systems learn from every operation, allowing them to adapt to SaaS businesses' specific needs and increasingly benefit workflows over time.

Delivering real-time intelligence with Sage

Sage Copilot has variance analysis to track spend against budget, while GL outlier detection automatically flags unusual transactions based on historic activity. In practice, this means that it can analyze up to 15 million transactions weekly and flag any issues before they impact operations.

Sage Intacct also delivers real-time intelligence by:

- Creating 500+ recurring billing scenarios—crucial for SaaS businesses with evolving pricing models.
- Generating 200+ reports and forecasts, all tailored for different stakeholders, to support growth ambitions.

How Nuqleous saved time and grew value with Sage Intacct

Nuqleous is the leading SaaS provider of automated space planning and performance analytics solutions for retail and CPG companies.

Before implementing Sage Intacct, staff struggled to find time to fine-tune reporting or gather insights, with precious man-hours being spent on non-value add activities like payroll and sales tax. The company moved to Sage Intacct and implemented Sage Intelligence to leverage real-time data dashboards that cover key SaaS business metrics.

The result? With Sage Intacct, Nuqleous:

- Reduced close time by 80%, going from 15 to four business days.
- Cut SaaS waterfall reporting from one week to 15 minutes.
- Automated revenue reconciliation to happen at the push of a button.
- Improved customer lifetime value.
- Improved cash flow.
- Increased net revenue retention rates.
- Improved key SaaS revenue metrics by tracking renewal management.

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The ease of use in the SaaS Intelligence dashboard frees up time to focus on our strategic priorities. It gets you out of the minutiae of non-value add activities.

Brendan Ahern
VP of finance,
Nuqleous



Nucleous chose to leverage the Sage Intacct Contracts module to run dimension-based reporting and automate revenue recognition—saving time and reducing the likelihood of errors.

It is also now realizing additional efficiency gains by taking advantage of Sage Intacct's straightforward APIs to integrate with best-of-breed applications including TriNet for payroll, Avalara for sales tax, and Ramp for expense management.

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Before, we tracked renewal management in spreadsheets, and it wasn't easy to figure out who we needed to bill and when we needed to talk to customers. Now our account managers can go into the Contracts module, look at dates and say, 'Hey, I haven't talked to this customer in a little bit, it's time to reach out.'

Brendan Ahern
VP of finance,
Nucleous



Tap into **predictive analytics**

The ability to anticipate cash flow needs and identify the risk of churn at the customer or segment level is crucial to SaaS finance leaders with growth ambitions. Without a clear, data-driven understanding of these dynamics, it becomes incredibly difficult to navigate market shifts or scale the business with confidence.

With AI-enhanced variance analysis, CFOs and fellow business leaders get clear insights into budget or prior period differences so they can proactively investigate discrepancies and address spending concerns.

These AI tools can inform data-backed decisions that mitigate risk and maximize return, ultimately removing some of the risk involved in scaling a SaaS business by getting a better understanding of the most volatile influencing factor: people.



With Sage Intacct, SaaS CFOs can:

- Lead with confidence, transforming finance into a strategic growth engine.
- Strengthen their voice in the boardroom, with automated board decks, investor updates, and business reviews at their fingertips.
- Accelerate global scale, consolidating hundreds of entities in minutes—complete with localized tax, currency, and language support.
- Drive seamless operations, by integrating finance with other business-critical apps through open APIs.

Enhance scalability and responsiveness

Growth is the ultimate goal of any SaaS finance leader; stable, measurable growth—sustainably managed through unpredictable market conditions—that drives the company forwards to new heights. However, being the catalyst for growth requires responsiveness, which is why data visibility is so important.

Often, the finance teams responsible for driving growth still rely on legacy systems that limit their ability to scale. To lead effectively, they need tools that not only maintain operational resilience but also unlock capacity without increasing headcount.

Features should include:

- Accurate reporting available on demand.
- Enhanced forecasting and variance analysis.
- Predictive analytics to inform decision making.

AI may not automatically unlock this kind of resilience, but it can power the tools that help finance leaders understand their company's capacity for growth. Similarly, the confidence instilled by systems that can manage higher levels of cash flow can create investor confidence and help secure funding for future growth.

AI tools also enable finance leaders to power business expansion in new ways—cutting down on unnecessary expenditure or reducing the number of team members completing repetitive manual work rather than focusing on growth-orientated opportunities.

Sage Ai solutions can scale up and down as your company grows. Gain extra support as you move to IPO or confidently understand the metrics that matter to you and your investors at each stage of your revenue model.

OneStream launches IPO with the help of Sage Intacct

OneStream, a comprehensive cloud-based platform to modernize the office of the CFO, was struggling with manual accounting processes that couldn't support their rapidly expanding needs.

Their finance team wanted to support the growth of the company but was finding their primary finance workflows, including recurring billing, revenue recognition, and close processes, were too manual and inefficient. They couldn't handle increasing volumes of transactions and complexity, particularly when international closes were included. Plus, a lack of integration with new marketplace applications was creating silos and strategic blind spots.

After implementing Sage Intacct, OneStream grew its CMRR by 800% across four years and took the company to IPO.

The biggest benefits were:

- Reduced close time from 15+ days to just five days.
- Improved financial reporting.
- Automated revenue recognition, in compliance with ASC 606 and IFRS 15.
- Support for the addition of new products and billing models, including expansion into 18 international ledgers.
- Streamlined OneStream's global cash management.
- Improved team morale and culture by switching from manual tasks to higher level work that supported company growth.

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Sage Intacct gave us the robust financial transactional tools and compliance tools and integration capabilities we needed to prepare for our growth and becoming a public company.

Pam McIntyre

Corporate Controller and Senior Vice President of Finance, OneStream



Lead the future of finance with **Sage Ai**

Sage Ai has been developed by a world-class AI team to support SaaS businesses using Sage Intacct.

From early to late stage, the intelligent tools in Sage Intacct empower CFOs to save time, increase operational efficiency, support scalable growth, and demonstrate financial resilience to investors.

Sage has:

- 8+ years delivering AI solutions
- 35,000 models trained daily
- 1.2 billion AI predictions annually
- 24 million invoices extracted annually
- Saved SMBs 100s of hours each year¹

¹<https://www.sage.com/en-gb/sage-ai/>

The Sage Ai suite

- **Sage Copilot**
Advanced generative AI capabilities.
- **AP automation**
State-of-the-art machine learning to reduce manual data entry.
- **GL outlier detection**
Automatically flag unusual transactions.
- **Intelligent Time**
Automate time sheets and analyze billable time.



Enhancing efficiency in SaaS

As SaaS businesses grow in complexity, CFOs are under increasing pressure to lead with speed, precision, and strategic foresight. Manual spreadsheets and disconnected point solutions can no longer keep up with the demands of modern finance.

AI-powered tools give SaaS CFOs the edge they need, by automating time-consuming tasks to free up capacity, streamlining compliance and risk management, and delivering real-time insights that optimize working capital and support decision making across the C-suite.

To stay competitive and scale with confidence, SaaS CFOs must begin leveraging the full potential of integrated AI solutions.

Sage Ai is embedded directly into Sage Intacct—simple to use, easy to adopt, and purpose-built to help finance leaders drive growth and resilience at every stage of the SaaS journey. It's your single source of truth—bringing together all your key SaaS metrics in one unified platform, automating key finance workflows, and enabling CFOs to lead with clarity, speed, and confidence.



Power-up your capabilities

Sage for SaaS and Technology Plans can empower you and your team with streamlined accounting and automated financial processes, designed to scale with your business.

- **Subscription billing:**
Seamlessly manage 500+ subscription, usage, and hybrid billing models while effortlessly mastering revenue recognition.
- **Gain real-time visibility:**
Deliver 200+ investor-ready SaaS reports and forecasts up to 80% faster.
- **Start fast, grow faster:**
Easy setup, leveraging prescriptive best practices, means you can start using the platform quickly, with the flexibility to add more capability as your business expands.
- **Integrate seamlessly:**
Experience the power of having one unified system of record, where data is automatically synchronized across all the applications including your CRM, billing systems, and other essential SaaS tools.



Are you ready to discover how the AI capabilities built into Sage Intacct can help you lead smarter and scale faster?

[Download the factsheet here. →](#)



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