NetSuite Professional Services: The Right Choice for Your NetSuite Implementation

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After months of vetting new ERP software, sitting through demos, talking to peers in your industry and realizing the massive benefits it can deliver to your business, you've decided that NetSuite is the best system for you. It stood out amongst its peers as the technology that could help empower your business imperatives now and aspirations down the road. Now, your journey to what's next can actually begin. But as you sign the contract, also decide who implements the software and how it gets implemented.

In the ERP buying process, who implements the software and the methodology they use is one of the most important decisions you can make. The implementation makes the difference in delivering a successful ERP project, one that falls short of expectations or worse, is an outright failure.

How Do I Select a NetSuite Implementation Partner?

It's critical that the implementation team not only knows the product and can configure it in a way that best suits the needs of your unique business but that it can impart best practices and run training as well. It's also important to select a partner who can continually optimize the software and help the business both visualize and deliver on whatever it needs next.

> "Our NetSuite Professional Services team was outstanding and really knew their stuff."

Jay Mebane, Founding Member, Bootstrap Advisors

In considering who should implement the software, start with the following questions.

- What is our budget?

- How fast do we need the software up and running?

- Does the partner understand my business and have experience in my industry?

- Does the partner have proven tools and processes to migrate data from our current enterprise systems (or manual processes)?

- Does the partner provide templates out-of-box, and is the partner able to easily configure the software for role-specific scenarios?

- What training support does the partner provide?

- What support does the partner provide post go live?

- How will the partner enable and support additional projects and functionality in a continuous way?

NetSuite boasts a robust partner community through its network of Alliance partners. But for certain customers, working with the NetSuite Professional Services team can provide distinct advantages.

What is NetSuite Professional Services?

NetSuite pioneered cloud ERP, establishing the world's first company dedicated to delivering business applications over the internet in 1998. As a result, NetSuite has had plenty of time to figure out how to effectively and efficiently implement cloud systems. Over decades and across thousands of implementations, NetSuite has built up a deeply experienced group to implement its software—the NetSuite Professional Services team. This is a global team of thousands of implementation consultants, project managers and customer success managers directly working on NetSuite projects.

Some of the advantages of a NetSuite Professional Services implementation include:

- **Efficiency.** The handoff between the sales cycle and the implementation is effortless because the implementation flows from the requirements gathering process during the sales cycle. Customers aren't facing the frustration and wasted time involved in answering the same questions

"Our two key factors were time-to-go-live and cost. The NetSuite team struck the perfect balance between those two."

Jay Mebane, Founding Member, Bootstrap Advisors

two or three times. This ensures time isn't spent unnecessarily going through those processes again and accelerates time-to-value.

- **Expectations.** All NetSuite Professional Service implementations leverage the SuiteSuccess methodology. This is a clearly defined set of processes to follow coupled with industry-specific or process-specific software configurations that include best practices learned over thousands of implementations. SuiteSuccess provides both a framework and the tools that allow the team to set clear implementation timelines, as well as stick to a fixed-rate for the entire implementation (yes, you read that right).

- **Experience.** Many senior consultants have been working on NetSuite implementations for two decades and have deep subject matter experience

> "The SuiteSuccess people are amazing. It made a big difference, the fact that it's their own product, their own team has made a big difference in how our system was customized and configured based on our needs."

Jean-Claude Homet, Vice President of Finance, DataValet

in a wide range of industries. Working with NetSuite Professional Services is a cost-effective way to augment your internal capabilities to ensure the software is implemented in the right way.

- **Education.** NetSuite Professional Services has more certified NetSuite consultants than anyone in the ecosystem—including a large proportion of consultants who have earned all five NetSuite certifications. Customers have access to a deep bench of experience for consultants to solve issues or provide answers to any questions that come up on site.

What Can I Expect From a NetSuite Professional Services Implementation?

NetSuite's SuiteSuccess is unlike anything else in the industry because it provides the ability to go live with NetSuite functionality in a very short time for a fixed cost.

SuiteSuccess pre-configures your NetSuite solution with industry-specific and/or role-specific functionality—including workflows, a huge library of pre-built reports, dashboards and KPIs based on industry or process-specific best practices. This means that instead of designing the entire process from scratch, the business can spend time working through an established process and training end users.

Knowing what to expect from a NetSuite Professional Services SuiteSuccess implementation helps in deciding on an implementation partner.

1. **Seamless handoff from sales allows implementation team to hit the ground running.** One of the reasons companies shy away from ERP implementations is the commitment it requires from key staff. One big advantage of going with NetSuite Professional Services is that the handoff from the sales team to the implementation team is really just a continuation of a process already in motion. Consultants can access information from internal systems from the sales cycle and buying process that jumpstarts the implementation—with the added benefit of being able to easily connect with whoever made the sale. That provides continuity invaluable in establishing and setting expectations and goals for the implementation, and guards against one of the parts of ERP implementations that can be a major point of unrealized success. Everyone is on the same page and has the right infrastructure and tools to communicate.

2. **Ability to set a fixed timeline and a fixed rate for the implementation.** Establishing very clear expectations up front—and experience implementing thousands of similar process scenarios—means NetSuite Professional Services can reliably deliver on timelines, without scope creep or going over budget. Companies have gone live with NetSuite in as little as 30 days, and many implementations can be accomplished within 100 days.

3. **Proven data migration tools.** Data migration can be the most time-consuming and tedious part of the ERP implementation process. NetSuite's data migration tools and associated services that come standard with NetSuite Professional Services engagements make the process of data mapping and importing data from spreadsheets into NetSuite using a CSV import tool much easier. This is particularly useful for getting data from third-party systems that aren't directly integrated with NetSuite. These tools support migration of customer data, vendor and item data and transactional data, including opening account balances, historical balances and open transactions.

4. **Continual improvement in the implementation process itself.** ERP implementations often conjure images of consultants milling around onsite and driving confusion amongst staff about what they're actually doing there. NetSuite is constantly taking steps to drive more efficiency into the implementation process, which also drives down costs and shortens timelines. As an example, customers now have the option to use Zoom for user acceptance testing (UAT)—the last step before go live—to save the time

and expense of in-person testing. NetSuite Professional Services is constantly looking for ways to make the implementation process leaner and focus on actions and activities that add value for businesses.

5. **Dedicated project resources.** Depending on the size of the customer and complexity of the implementation, the team may range from two to five people, including project management, functional and technical consultants and training staff. The consultants work with the business process owner to generate and build buy-in for the project at the earliest stages of the implementation—a critical success factor. The consultant works to lead, personalize and tailor the solution to meet the unique process requirements of the business, being careful to balance unnecessary configuration or even customization that makes projects go over timelines and budgets without adding significant value. NetSuite consultants have the benefit of proximity to the product team as well as a deep bench of other consultants that can work quickly to answer questions or provide solutions to unanticipated issues that come up.
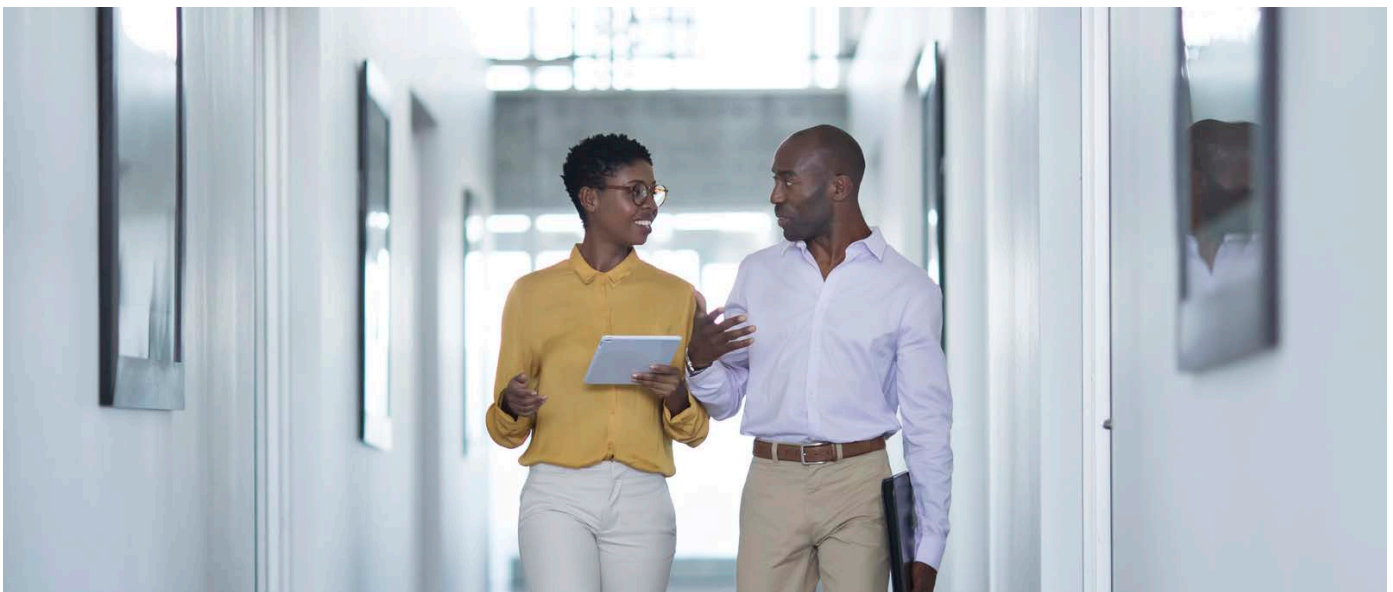
> "We have this mansion of NetSuite, and we didn't realize…we were living in the garage. There's so much more. ACS moved us into the house."

Aaron Roberts, Director of Accounting, Downtown Project

6. **Out-of-the-box offering configured to unique business needs.** Depending on the needs of the business, the software can be configured for parent and subsidiary accounts, and configured for language and currency requirements. Consultants turn on purpose-built dashboards created specifically for roles, which include reminders, shortcuts and key metrics necessary to perform their jobs. For instance, for a controller, the prebuilt dashboard allows easy access to the income statement, budget vs. actuals for AP and AR aging. The controller can pivot the report by different parameters, and further create role specific reports from those items and metrics—such as EBITA and department costs per FTE.

7. **On-demand education and remote custom training sessions help users gain quick comfort with the system.** With NetSuite Learning Cloud Support (LCS) Company Pass, companies can choose programs that increase user adoption and help speed time to value. LCS Company Pass allows your NetSuite users to start learning from the beginning of your NetSuite journey, offering a wide array of education options including eLearning courses, hands-on lab exercises, interactive webinars and user enablement support. And if your organization requires more customized training, Tailored Training Events Pack add-ons are an excellent option.

8. **Continued access to global support and optimization services.** NetSuite Professional Services doesn't consider its job complete once the system is turned on. As part of this comprehensive process, there is an effortless transition to basic NetSuite customer support or premium NetSuite Advanced Customer Support (ACS), which provides hands-on product guidance, configuration support and ongoing optimization. Again, everyone in the support and service organization benefits from continuity of information enabled by this seamless transfer of knowledge. This greatly speeds time to resolution if there's an issue with the system or user acceptance, as well as provides the ability to continually optimize the use of the software.

What Happens After the Implementation?

During a SuiteSuccess implementation, there is usually a baseline of functionality that the customer needs to get up and running quickly. Here is where other consultants may pack up and leave. But there are going to be more questions about the functionality in place and how to best use it.

That's why it's so important that there's a handoff between the implementation team and a team that will assist post go live. NetSuite ACS is focused less on reactive problem-resolution and more on how the business can continually optimize the existing software, gain more efficiency in its current processes and enable new business initiatives. Businesses can pick from a number of levels of support that build upon one another as they need it. Businesses can also opt to access pooled resources, or opt for a dedicated functional consultant. From there, they can gain access to a dedicated customer success manager who can then work with a team of technical consultants for additional software projects.

The cut-over to post-implementation begins during UAT, giving the ACS team a chance to view the business, its processes and its people up close.

This facilitates knowledge transfer because the implementation team is still heavily involved.

Take the Downtown Project, a privately-funded, for-profit enterprise dedicated to helping revitalize downtown Las Vegas. The NetSuite customer looked to ACS to help automate all billing processes through NetSuite. The ACS team came in for a couple of days, looked through processes and talked to the people who run them. In just two days, the finance lead reported that the ACS team identified inefficiencies, saw areas they had on the project book for years and offered resources to help—finding ways NetSuite could help. Now, the Downtown Project's team isn't just accessing NetSuite, but using it to automate more accounts payable processes and get rid of manual data entry.

How NetSuite Was Implemented in Three Months for Bootstrap Advisors

Durham, N.C.-based Bootstrap Advisors has built its business on knowing that inspiration can strike anywhere. After backing Thundershirt, a company that makes compression shirts to help dogs calm down during thunderstorms, it formed a financing and advisory services firm to help inexperienced founders accelerate the growth of low-tech, tangible consumer products. In just 10 years, it has started more than 10 companies, grown five of them into multi-million businesses and sold three (to a private equity firm, public company and a private company).

To manage its growing portfolio of companies, Bootstrap Advisors needed to get off QuickBooks Enterprise—fast. It selected NetSuite based on an extensive review of competing solutions, as well as peer recommendations. In order to prepare for the busy holiday season, Bootstrap Advisors needed to be up and running on its new enterprise system by August 1—providing only three months between contract signing and go live.

It looked into hiring a NetSuite Alliance partner, but they were more expensive and none could meet the aggressive timeline that NetSuite Professional Services could. Bootstrap Advisors went live with NetSuite in three months, on budget and on deadline. This included financial and accounting functionality to manage its portfolio of companies as well as manufacturing functionality, including work orders and assemblies, used at individual businesses to make the products.

"The team we had was fantastic," Jay Mebane, Bootstrap Advisors founding member, said. "They all communicated well, they knew their role, did what they had to do and our project manager made sure to keep everyone aligned and on task."

The team also opted to use ACS, which Mebane said, "was invaluable as we were continuing to tweak and try to get that implementation the way we wanted it."

"On the implementation side, from scoping out the project, managing it, to going live, I would say it was one of the smoother implementations I've done. Nothing but kudos and high fives to the implementation team."

Jay Mebane, Founding Member, Bootstrap Advisors