

NETSUITE SPECIAL

CIO Review

JULY 22 · 2015 CIOREVIEW.COM

CIO INSIGHT

Customization in NetSuite:
The Right Approach

Chris Blaisure,
CIO,
SD Mayer & Associates, LLP

Harbour Mastery: Reimagining Seaports Management with NetSuite

George Walters,
President

\$ 15US



CIO REVIEW
44790, S Grimmer Blvd.
#202, Fremont, CA-94538

5 Best Practices for a Successful NetSuite Deployment

By Michael Johnson, Principal, Bridgepoint Consulting

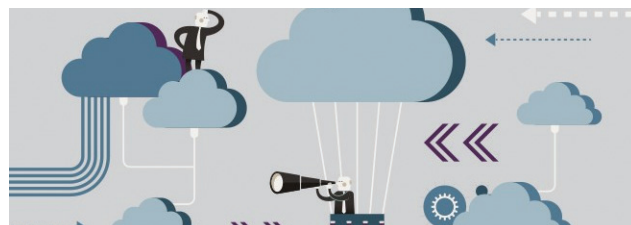
With its cloud-based, unified approach to business management software, NetSuite holds the promise of transforming business performance for many kinds of companies, from ecommerce to manufacturing. But success with NetSuite depends on applying best practices to ensure that it will deliver on its full potential for business improvement. Over years of experience implementing NetSuite for a variety of companies, I've had the opportunity to identify five best practices for successful NetSuite deployments, and I appreciate this opportunity to share them with you here.

Follow well established system implementation processes.

It's tempting to think that because a software solution is in the cloud, you don't have to do the hard work of requirements definition, design validation, testing and user involvement that on-premise solutions require. But you do. It doesn't matter whether software is physically deployed in your business or it's in the cloud; a successful implementation still requires a systematic approach to integration with your business workflow. Take the time to do this on the front end, secure in the knowledge that a rapid cloud-based implementation of NetSuite will follow—and that the proper planning will ensure it goes off without a hitch.

Carefully analyze the need for customizations.

Customizing NetSuite can bring substantial value to a company's operations, and NetSuite's open-architecture development tools



support very powerful customizations, including integrations with other systems. But it's important to resist over customizing, which can add unnecessary development and maintenance time and costs to a NetSuite implementation. Some customization is almost always needed to address specific business needs; just keep in mind that a little goes a long way. This is because NetSuite is preconfigured to incorporate industry best practices that support many complex business processes with little or no customization, and it generally only needs to be customized to meet very specific requirements that deviate from the norm.

Create integrations to enable growth.

Another powerful feature of NetSuite is its open integration environment. By leveraging NetSuite's ability to connect with your other business systems through open APIs, you can create an environment in which data can be entered just once, with no need to move it between systems or reconcile it manually. So, for example, a salesperson never has to look up a customer's information in several places, navigate multiple systems to see what's in inventory or otherwise intervene manually in the sales process. Integration at this level is a true differentiator of NetSuite—one that provides a toolset for a business to grow substantially.

An engineering company that provides tuning services to the automotive industry recently had our firm integrate NetSuite with its existing Magento and Salesforce implementations. Now that the company manages all major business processes within or through NetSuite, it's been able to adopt more standardized procedures, resulting in more efficient operations.

Phase the project so you can have quick wins.

As a cloud-based solution, NetSuite lends itself to implementation in phases; you can roll out just the services and capacity you need, as you need them, rather than using the all-or-nothing approach that's typical of traditional on-premise deployments. This means

you can replace one or two individual systems or processes quickly and start seeing benefits immediately, instead of having to wait until the end of a prolonged project to see the effects of any of the changes.

A good example is a company that handles subscription billing for web hosting; overwhelmed by rapid growth, they asked our firm to engage with them in a phased approach to deploying NetSuite. Our first step was to replace their existing bookkeeping software with NetSuite's base accounting capabilities, which took just 30 days. Next, we converted their billing records to NetSuite's deferred revenue accounting model over a period of five months. The last step was to integrate NetSuite into their customer portal. They're seeing performance



Michael Johnson

“Customizing NetSuite can bring substantial value to a company's operations, and NetSuite's open-architecture development tools support very powerful customizations, including integrations with other systems”

improvements at every stage that are helping them handle their rapid growth.

Develop a continuous improvement process

NetSuite's twice-yearly releases create a great opportunity for companies to look at the functionality of their systems and at areas of the business that need improvement. We encourage clients to do a semi-annual check, develop a list of priorities for improving processes and implement the items on the list over time. This method makes it possible to continually reprioritize improvement, focus on critical needs first and take advantage of new capabilities in each new NetSuite release.

Two years after a precious-metals company engaged our firm to create a NetSuite-based integrated sales and management environment, we're working with the company to implement improvements to the processes we instituted in that original engagement. We jointly developed a list of priority items, determined whether each would be best handled internally or by our firm and have been methodically managing through that list to minimize the impact of change and spread the cost of improvements over time.

This takes me back to the first best practice on the list and the importance of disciplined implementations and follow-throughs, even when your software is in the cloud. NetSuite is such a capable tool that it's important to plan judiciously and configure carefully to get the most out of it—both at the outset and on an ongoing basis. Do this, and you'll be able to fully realize the software's potential to reduce IT costs and drive productivity with a single system for core business processes. [CR](#)

