



NETSUITE BPO PARTNERSHIP STREAMLINING BUSINESS PROCESSES, LEVERAGING DATA AND PREPARING CLIENTS FOR THE FUTURE

Founded by a group of executives from enterprise firms that wanted to level the playing field for small and midmarket clients, ScaleNorth Advisors builds value for those clients by streamlining business processes, highlighting critical analytics, leveraging cutting edge technology and preparing for what comes next. It offers implementation services, consulting and business process outsourcing.

Comprised of financial, operating and technology professionals who understand the pressure of running businesses—and structuring for both growth and exit—the ScaleNorth team leverages standardized cloud infrastructure to automate and integrate processes across the entire enterprise.

“We’re NetSuite guys. If it fits into the NetSuite ecosystem, we’re pretty much doing it.”

David Lasky, Managing Director, ScaleNorth Advisors

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Headquartered in Santa Ana, California, ScaleNorth was founded in late 2018 and grew to more than 20 employees in less than a year. “My partner and I ran the finance and operations functions of a company,” said David Lasky, Managing Director. “We fell in love with NetSuite and formed ScaleNorth knowing that we were going to be a NetSuite partner that could deliver the highest quality implementation and service approach based on our extensive use of NetSuite as a customer.”

Challenge

Having used other ERP systems in the past, Lasky said NetSuite’s platform was like “night and day” when measured up against its competitors. And while the company’s founders did explore their options on the market—including Microsoft and Sage—NetSuite was the main contender both going into and coming out of that due diligence process.

“If you look across the competitive landscape, there really isn’t a solid competitor to NetSuite,” said Lasky, “and especially not one that provides the levels of flexibility that this cloud ERP provides.”

Solution

A NetSuite partner since inception, ScaleNorth was formed with the mission of using the cloud ERP platform as the solution of choice for the company’s manufacturing, distribution, construction, media, entertainment and professional services clients.

ScaleNorth partners with these clients by making its team, tools and technology an extension of a client’s operations. The ScaleNorth team knew that the solution to the gap in the market was a careful balance between a great product and a highly skilled implementation team. With their experience and know-how, ScaleNorth has successfully solved for both. That means not only working in the present, but also understanding what’s coming around the next corner and helping companies prepare for those events. “We’re able to do a lot with NetSuite, both operationally and financially,” said Lasky.

In the financial realm, for example, most of ScaleNorth’s clients will at some point want to raise capital, acquire, divest of assets or sell their entire business. “We always keep the exit in mind,” said Lasky. “All of these moves involve some type of financial transaction, which means we needed a solution that could produce reports that were easy for banks and investors to digest.”

Results

Becoming a NetSuite Partner has enabled ScaleNorth Advisors to:

- **Create** an extremely compelling offering in the marketplace around its services.
- **Scale** quickly and serve a wider swath of customers.
- **Standardize** all of its back-end processes and use them to service its clients.

“You have to specialize in a platform that allows you to service BPO clients in an efficient manner and at a big cost advantage for the client. NetSuite is the mining equipment that makes that happen.”

David Lasky, Managing Director, ScaleNorth Advisors

- **Improve** financial reporting and analytics for the business process outsourcing (BPO) side of the house.
 - **Empower** clients to scale their businesses to meet market opportunities much faster than they could in a pre-NetSuite world.
 - **Leverage** the vast knowledge base of NetSuite engineers and technical support professionals and use that data to help customers work better, smarter and faster.
- Advantages to Partnering with NetSuite**
- **Helps ScaleNorth create an extremely compelling offering for its customers.** “Most consulting firms ‘build and transfer’ but NetSuite allows us to ‘build and operate,’” said Lasky. Because ScaleNorth is both a solution provider and a BPO partner, it brings a unique perspective to the table. “We can take all of the learning we’ve collected and use it to create an extremely compelling offering for our clients,” he added, “because we’re not only offering the platform to our clients, but we’re also using it ourselves.”
 - **Allows ScaleNorth to scale its BPO business quickly.** In most cases, ScaleNorth uses a phased-in approach for implementation that allows clients to get accustomed to using certain functionalities before adding new ones. “We’ve been able to scale tremendously fast,” said Lasky. “There is really no limit to how fast you can scale a business with NetSuite.”
 - **Standardize all back-end business management processes.** ScaleNorth uses several standard configurations that can be mixed and matched across clients, allowing standardization in outsourcing operations while providing a customized solution that perfectly address each client’s unique needs. These come together to serve as a foundational “playbook” for the partner’s accounting and implementation team members. “Everyone knows what they need to do for clients at any given time,” said Lasky. “Because NetSuite allows us to do that, we’ve been able to achieve a pretty amazing operational scale within a very short period of time.”
 - **Provide advanced financial reporting and analytics capabilities.** “Most of our BPO clients are coming off of some version of Dynamics, QuickBooks or Sage,” said Lasky, “neither of which has the reporting and analytical capabilities that NetSuite has.” ScaleNorth’s clients are consistently impressed by these capabilities, he added, “CFOs and CEOs tend to give the biggest accolades in this area.”
 - **Helps clients scale and streamline their own businesses.** ScaleNorth recently took on a client that is moving all of its business operations from a clunky legacy system to NetSuite. The change allows the client to view orders in real-time, get delivery updates and check inventory, creating massive operational efficiencies while also offering

superior financials across the board. “The company will also be able to ping customers for additional information,” said Lasky, “and more efficiently fulfill orders and requests.”

- **Provide a solid foundation for success.** When he looks across the competitive landscape for the services that ScaleNorth offers, Lasky sees a huge opportunity. “To build a successful, world class outsourcing practice, you need a platform that does not limit you in terms of client size or industry,” he explained. “NetSuite provides just that. A platform that allows us to work with clients of any size and better serve their individual needs.”

To learn how an Oracle NetSuite can benefit your organization, please call us at (714) 705-6075 or visit us at www.scalenorthadvisors.com



Partner Snapshot

Company: ScaleNorth Advisors

Industry: Outsourcing and business advisory consultancy

Location: Santa Ana, Calif.

