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NetSuite Consulting
Real-world examples of ScaleNorth's expertise

March 2025

Representative Client Engagement

Health & Beauty E-commerce

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Industry:	Retail
Revenue:	$12M+
# of Employees:	85
Type of Engagement:	NetSuite Optimization

Situation
- Privately-held company brands known for disruptive innovation in the beauty sector
- Siloed systems not integrated to 3PL or E-commerce platform tools
- Initiative to optimize systems to provide scale with future growth

Challenges
- Double-entry and mismatched data across systems
- Lacked consolidated reporting and training for the accounting period close process
- No data trust or governance due to reporting gaps
- Production environment was cluttered with test data that impacted operations.

ScaleNorth Approach
- Engaged a Managed Services Team to prioritize, manage and deploy new optimization initiatives.
- Integrated TikTok through Pipe17 integrations
- Provided a customized scripting solution for managing backordered components.
- Built customized reports and dashboards.
- 3PL integration including testing and training

Results
- Delivered C-level reporting and dashboards providing realtime visibility into operations.
- Trained and enabled client users to customize future reports as companys' needs change.
- Deployed and enabled Client's month-end close process .
- Realtime valuation of assets, finished goods and cost of goods sold visible in NetSuite, eliminating spreadsheet and manual processes.

Phased and Future Initiatives
- Oversee the company's Warehouse Management System roll-out (RFSmart).
- Through a Managed Service Program, facilitate ongoing client NetSuite roadmap planning.

Representative Client Engagement

Medical Device Manufacturing

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Industry:	Manufacturing
Revenue:	$15M+
# of Employees:	89
Type of Engagement:	NetSuite Optimization

Situation or Background
- Maker of innovative medical products for military veterans
- Federal government key customer for advanced medical and pharma tech
- Awarded a new contract that would expand its business significantly.
- Needed processes, automation and optimization to support growth and competing solutions.

Challenges
- Procure-to-pay and order-to-cash processes both needed streamlining.
- Government contract compliance
- Existing processes were unscalable and highly manual.
- Production, delivery and accounting bottlenecks
- Slower response times, delayed deliveries and errors impacting customers

ScaleNorth Approach
- Engaged a Managed Services Program to collaborate with client on key initiatives, priorities, and a roadmap plan.
- Implemented automated sending and receiving of Pos.
- Sourced a third-party partner to develop a custom NetSuite portal.
- Automated sending of sales orders from customer sites.

Results
- Onboarded two new high-volume contracts.
- Scaled NetSuite operations to execute a tenfold increase in revenue.
- Streamlined operations with reduced manual effort and a larger focus on strategic alliances.
- Shifted to proactive vs. reactionary work within 90 days.

Phased and Future Initiatives
- Explore more areas to optimize NetSuite and partner with ScaleNorth to plan and execute
- Automate key procure-to-pay processes to further decrease processing times.

Data Center Construction and Management

Industry: Facilities Management

Revenue: $6M

# of Employees: 70

Type of Engagement: NetSuite Optimization

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Situation
- ▲ Provides data center services and infrastructure, including colocation and build-to-suit
- ▲ Turnkey data center solutions are hyper-scalable and be customized to client needs
- ▲ Lacked visibility into its cost of goods sold (COGS)

Challenges
- ▲ Needed automation for procurement and vendor bill management
- ▲ Unreliable income statement and gross profit margin reports
- ▲ Difficulty tracking and analyzing procurement spend
- ▲ Poor financial oversight and missed cost savings opportunities
- ▲ Manual approval processes created bottlenecks and delayed procurement decisions.

ScaleNorth Approach
- ▲ Initiated a Managed Service Program to engage with Client.
- ▲ Established weekly project review cadence with stakeholder teams.
- ▲ Built a custom solution to support progress billing and change orders on purchases.
- ▲ Customized PDF templates to include purchase agreement documents.
- ▲ Custom reports that provide visibility on all project-related expenses

Results
- ▲ Enhanced reporting in NetSuite for up-to date procurement performance insights.
- ▲ Leverage data-driven decision-making
- ▲ Automate workflows and accelerate the PO approval process
- ▲ Reduced project delays and improved efficiency
- ▲ Better visibility into procurement spend helps improve cash flow forecasting.

Phased and Future Initiatives
- ▲ Avalara implementation
- ▲ Journal entry automation
- ▲ Custom reporting
- ▲ Provide ongoing client strategy and roadmap management.

Representative Client Engagement

Technical Accounting Firm Advising Public, Private-equity backed and Pre-IPO enterprises

Industry: Finance

Revenue: $30M+

# of Employees: 196

Type of Engagement: NetSuite Optimization

Situation
- National leader in complex accounting, tax and valuation services
- The company is growing significantly both organically and through M&A.
- Struggling under the strain of too many manual processes
- Manual lift required both for day-to-day accounting and month-end close
- Needed a NetSuite partner to help digitally-transform the business

Challenges
- Project Accounting was not functioning to capture project costs and provide dashboard visibility.
- Inefficient expense management and approval processes
- Sales team used Salesforce, but the CRM data was siloed.
- Lack of software integrations created too much double-entry and mismatched data.

ScaleNorth Approach
- Established a Managed Services roadmap and the team to support functional updates.
- Facilitated integration partner selection and deployment (Celigo) with custom API workflows.
- Designed a new process for revenue recognition to support fixed fee and other engagement types.
- Streamlined Order to Cash process with change management and cash receipt workflows.

Results
- NetSuite to Salesforce integration eliminates double-entry.
- Reduces error rates
- Streamline project creation and oversight
- Automate customer billing and revenue recognition

Phased and Future Initiatives
- Time and billing approvals
- AP invoice capture

Rapidly Expanding E-Commerce Accessories Retailer

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Industry:	Retail
Revenue:	$15M+
# of Employees:	130
Type of Engagement:	NetSuite Optimization

Situation
- ▲ Popular online retailer known for stylish, affordable accessories
- ▲ Frequently collaborates with influencers and celebrities on exclusive collections
- ▲ Company has experienced significant growth in recent years.
- ▲ Expanded product lines, new physical stores and bigger online presence

Challenges
- ▲ NetSuite instance was slow and transaction processing was taking too much time.
- ▲ The problems impacted everything from customer service to accounting.
- ▲ Inefficiencies in NetSuite scripts led to poor performance and process issues.
- ▲ Needed an assessment of existing scripts and a new ERP optimization approach
- ▲ Warehouse Management System (WMS), e-commerce and third-party integrations needed streamlining

ScaleNorth Approach
- ▲ Structured an industry-focused team to provide an assessment and roadmap plan for optimization.
- ▲ Assessed and reengineered active NetSuite scripts.
- ▲ Enhanced SnapFulfil Warehouse Management integration.
- ▲ Improved Shopify integration with NetSuite.

Results
- ▲ Dramatically improved efficiency and system performance
- ▲ Enhanced NetSuite user experience
- ▲ Streamlined warehouse management and ecommerce platform integrations
- ▲ Bridged gaps where data was automatically "talking to" all systems.

Phased and Future Initiatives
- ▲ Warehouse Management System implementation (RF-Smart)
- ▲ Custom reporting
- ▲ Inventory cleanup

Representative Client Engagement

Life Sciences Start-up

Industry: Life Sciences

Revenue: Pre-Revenue

# of Employees: 20

Type of Engagement: Project Rescue

Background:
- ▲ Private equity backed
- ▲ Transitioning from QuickBooks
- ▲ Pre-revenue
- ▲ Complex multi-step, multi-vendor outsourced manufacturing process FDA and traceability requirements

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Situation
- ▲ Concerns mid-implementation with NetSuite Professional Services
- ▲ System design not scalable for growth
- ▲ Training and testing gaps
- ▲ Leadership and Board concerns about Go Live readiness
- ▲ Referred to ScaleNorth for project turnaround

Challenges
- ▲ Needed NetSuite system live and scalable to meet FDA traceability requirements.
- ▲ Investor lacked visibility into operations and KPIs.

ScaleNorth Approach
- ▲ Assume project leadership and responsibility
- ▲ Propose a phased, MVP approach
- ▲ Perform system assessment
- ▲ Document gap analysis and set realistic Go Live dates
- ▲ Design system for rapid scalability for post FDA approval
- ▲ Create future state Chart of Accounts and Class structure
- ▲ Uncover inventory setup flaws and redeploy

Results
- ▲ Developed optimization roadmap with priority and value milestones.
- ▲ Leadership and Board sign-off

Phased and Future Initiatives
- ▲ Phase 2 implementation within 60 days of Go Live
- ▲ Execute roadmap and achieve milestones
- ▲ Bank reconciliation automation and training
- ▲ Workflow automations deployed
- ▲ Reporting, dashboards and KPIs

Kissler & Co.

Company:
A leader in plumbing parts manufacturing and distribution.

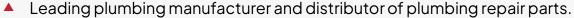|	
Industry:	Manufacturing
Revenue:	Est. $15M
# of Employees:	46
Type of Engagement:	Project Rescue

Doug Tanner
VP of Manufacturing

" I wanted to give your team 5 stars. When I send an email to [the team] I get a response within the hour. Unheard of in the software industry. If they don't have an immediate answer, I get a time frame on when I will have one, and they usually are ahead of their estimate. Please in your best way possible, offer my pleasure and excitement with being able to work with these incredible professionals. "

scalenorth | **Kissler**

Situation
- Leading plumbing manufacturer and distributor of plumbing repair parts.
- Striving be a one-stop-shop for plumbing parts.
- As the company scaled, the need for a powerful, cloud-based ERP was apparent.
- The ERP needed to support world class product manufacturing and service while scaling.

Challenges
- Started a NetSuite implementation in early 2021 with another consulting team.
- Hired a consulting team that struggled and went through multiple project managers and consultants.
- They were left with poor reporting and visibility, lack of efficiencies, and manual processes.

ScaleNorth Approach
- Began with an assessment of Kissler's overall processes and strategies and how they tied into NetSuite.
- Built an "Innovation Roadmap" highlighting a pathway from the current environment to an ideal one.
- Developed custom dashboards and reports to increase operational & financial visibility.
- Provided a "live chat" direct communication channel to Kissler's optimization team.
- Over 6 months, completed dozens of optimization projects and put Kissler months ahead of schedule.

Results
- Uncovered new opportunities for optimization and efficiencies
- Proactive approach eliminated systemic issues and reactive support cases.
- Reduced "support" cases from 80% to less than 5% of roadmap effort.
- Setting a six-month goal to get back on track, ScaleNorth was 3 to 4 months ahead of project milestones.

Phased and Future Initiatives
- ScaleNorth will continue to provide Kissler with optimization projects and ad hoc support.
- Kissler's team will continue receiving training on how to optimize their use of the NetSuite platform.

PriceSpider

Enterprise Brand Management & Analytics

Industry:	Software
Revenue:	$40M
# of Employees:	250
Type of Engagement:	Project Rescue

Kimberly Rimel
PriceSpider Controller

" We partnered with ScaleNorth because of their efficiency, professionalism, expertise – we knew they were a great fit for us. ScaleNorth's knowledge of native functionality in NetSuite runs so deep. There are so many functions and tools to learn how to use. With ScaleNorth we were able to ensure we were using NetSuite to full capacity. We likely wouldn't be if we were implementing NetSuite on our own "

scalenorth | **PriceSpider**

Situation
- Rapid growth
- Private Equity Funding
- International expansion
- Sector acquisition opportunities

Challenges
- Private Equity and international reporting requirements
- Transition from QuickBooks to NetSuite
- Complicated revenue recognition, contract management and SaaS finance reporting
- Initial NetSuite Partner gaps in project strategy and communication

ScaleNorth Approach
- Engage an experienced team with "technical accounting" mindset
- Initiate leading practices for SaaS growth financials and anticipate future opportunities
- Focus solutions on native NetSuite functionality and efficient deployment
- Strategy and execution to integrate foreign subsidiaries

Results
- Communication and a dedicated team provided deeper insights to executing long-term goals.
- Efficient off-the-shelf approach led to quick completion and value realized.
- Solving problems on the spot. "ScaleNorth's knowledge of native functionality runs so deep"

Phased and Future Initiatives
- Revenue recognition, subscription billing, and contract management technology selection
- Managed Services Program – NetSuite roadmap alignment with PriceSpider growth objectives