

From Toothache to Turnaround: How Smile Stream Fixed Its Ops with ScaleNorth & NetSuite



“ScaleNorth ultimately helped us solve the challenges of data integrity; gave us a centralized platform for viewing sales and inventory; and provided visibility into the step-by-step accounting and finance process, working with the ScaleNorth team from the very beginning was amazing. Their whole team has kept us on track, addressed our data integrity issues and gave us visibility into all areas of our business”

Willie Isom

COO/CTO at Smile Stream Solutions

Running a rapidly-growing business on disconnected software systems can be a lot like trying to fix a toothache with aspirin and wishful thinking. Sure the pain may be dulled for a while, but the root of the problem isn't being addressed. As symptoms worsen over time and the “quick fixes” don't work anymore, finding a real solution—finally making that dreaded dentist appointment—leaves you wondering why you didn't do it sooner.

That was the case for Smile Stream Solutions, a fast-moving dental products provider that was juggling multiple business systems: accounting in QuickBooks, e-commerce on Shopify and then separate systems for shipping and warehouse management before working with ScaleNorth to implement NetSuite, bring its operations onto a single platform, eliminate data gaps and support its next growth phase.



Company: Smile Stream Solutions

Location: Castle Rock, CO



Company: ScaleNorth

Location: Santa Ana, Calif.

No More “Quick Fixes”

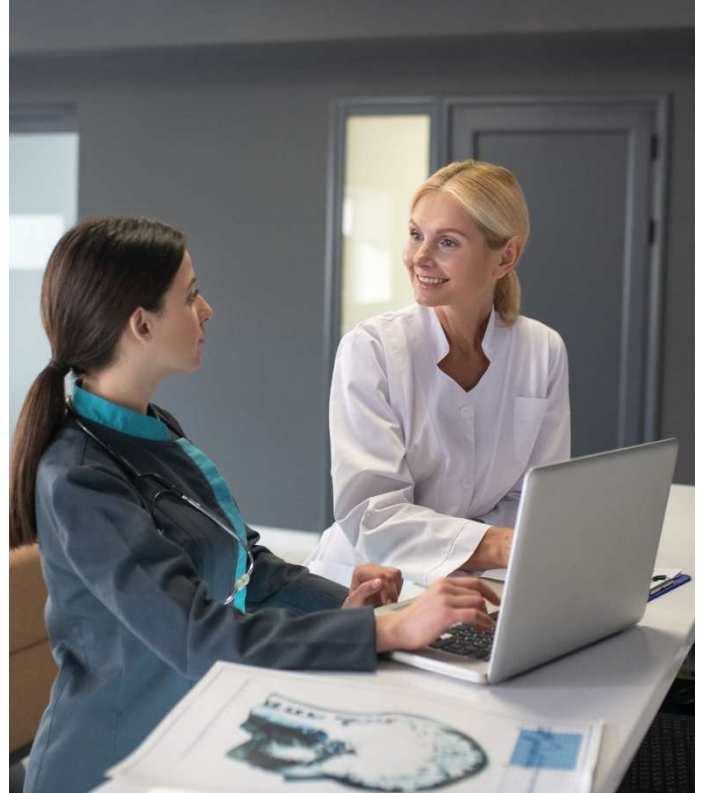
Smile Stream Solutions gives dental and orthodontic practices tools, technologies and support that they need to grow. From clear aligners and implants to 3D printing and digital workflow systems, the company’s products help improve both clinical outcomes and operational efficiency. Smile Stream’s core mission is to simplify the path for dental professionals and make it easier for them to deliver top-tier care and grow sustainable, future-ready practices.

When Smile Stream Solutions outgrew its patchwork of disconnected systems it became clear the company needed a more unified, reliable solution. It was juggling myriad disconnected systems. Keeping the data in sync across all of them was a constant challenge. Inventory, revenue, and sales data often didn’t match up, and the finance team lacked accurate reporting for budgeting, billing and payments.

“It was causing data integrity issues,” says Willie Isom, COO/CTO. The company had also brought in a third-party finance team to support monthly close and bookkeeping, but those efforts were limited by the existing software tools. Isom evaluated several different enterprise resource planning (ERP) systems before selecting NetSuite. *“I did some research and landed on NetSuite, which we ultimately decided to implement.”*

Picking the Right Partner

As a seasoned CTO, Isom is well aware of the complexities of implementing new, enterprise-wide software systems.



He initially considered working directly with NetSuite to implement Smile Stream’s new ERP, but also considered potential implementation partners like ScaleNorth. *“I researched a few different available options, including working directly with NetSuite and using their implementation team versus using a third-party provider,”* he says.

ScaleNorth immediately stood out not only for its deep implementation expertise, but also for its robust fractional outsourced accounting offering, which would give Smile Stream access to a team of NetSuite experts who could handle core accounting tasks post go-live. This helped ease some concerns about post go-live support and whether Smile Stream would be “left to its own devices” once the system was up and running. *“We didn’t want to just have to ‘figure it out for ourselves,’”* says Isom.

“We weighed out the options and decided to go with ScaleNorth, we felt more comfortable knowing that we had a team behind us that we could reach out to and get support from after go-live, rather than feeling like we were going to be left in the dark. That’s ultimately why we decided to go with ScaleNorth.”

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COO/CTO at Smile Stream Solutions

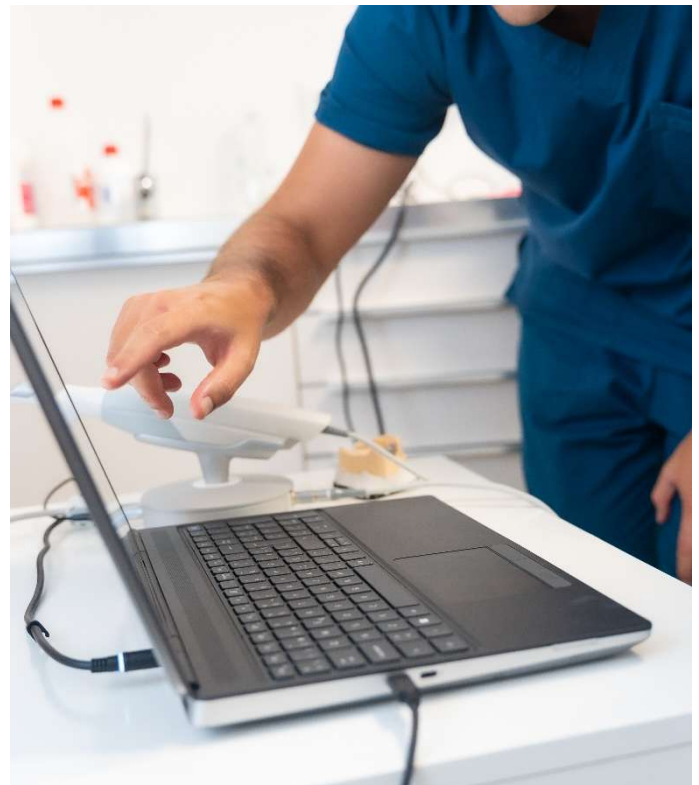
From Chaos to Clarity

Live on NetSuite since May 2025, Smile Stream now has a centralized, reliable system for managing its sales, inventory and financial operations all in one place. With ScaleNorth’s guidance, the company has established clear processes, eliminated manual work and solved the data integrity issues created by its previous, disconnected tech stack. Routine tasks like invoicing—which used to require time-consuming manual adjustments—are now fully automated inside NetSuite.

“ScaleNorth ultimately helped us solve the challenges of data integrity; gave us a centralized platform for viewing sales and inventory; and provided visibility into the step-by-step accounting and finance process,” says Isom. “Working with the ScaleNorth team from the very beginning was amazing. Their whole team has kept us on track, addressed our data integrity issues and gave us visibility into all areas of our business.”

One significant improvement came from automating Smile Stream’s invoicing process. The team had been manually adjusting invoices each month to reflect what had actually shipped. ScaleNorth helped automate the entire workflow in NetSuite, splitting invoices by shipment status and emailing them to customers automatically. *“That was a major time saver for us,”* Isom says. *“What used to take hours to complete now happens automatically.”*

The finance team has also eliminated manual tasks that were eating up time when it relied on QuickBooks and other platforms for accounting and financial management. During recent performance reviews, for example, team members shared how much time they’ve gained back with NetSuite in place. *“Most of it is automated now,”* says Isom, *“and that’s saving us a ton of time.”*





The Right Partner Makes All the Difference

To companies that are implementing new ERPs, Isom recommends looking beyond upfront cost when choosing an implementation partner. *“It’s not just about what’s cheaper on paper, it’s about the long-term value,”* he says. *“If something goes wrong, what kind of support are you really getting?”* For Smile Stream, having a dedicated ScaleNorth team that could answer questions quickly and stay hands-on after go-live made a big difference.

The outsourced NetSuite accounting (BPO) offering was another key factor. Instead of training someone internally on NetSuite from scratch, Smile Stream gained instant access to a team that already knew the platform, and had worked directly on the company’s ERP implementation. *“They understood how our business operated from day one and were able to jump right in post go-live,”* says Isom, who recommends ScaleNorth without hesitation.

Isom also credits the ScaleNorth team for staying on top of deadlines, offering practical best practices and helping Smile Stream get the most out of its investment in NetSuite. *“We know our business, but having experts show us where we could improve made the entire implementation stronger,”* says Isom. *“Software implementations are always challenging, but looking back, I wouldn’t say that was the case with the ScaleNorth team.”*