

Case Study: Customize and Implement NetSuite for Full Quote-to-Cash Process Integration

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Chris Summersgill, Vice President and Operations,
Big Belly Solar



Background

Big Belly Solar was growing so rapidly its infrastructure was essentially bursting at the seams. An informal assortment of spreadsheet-based point solutions had been assembled to handle its business processes. Basic editions of Salesforce, Quickbooks and Excel comprised the backbone of their business management system for CRM, accounting and asset tracking functions.

Simplifying Business Operations

“Our challenge was to create, design and implement a truly scalable, end-to-end infrastructure solution that would allow us to continue our significant growth,” said Chris Summersgill, Vice President, Operations at Big Belly Solar. “We were looking at how we get rid of all the manual spreadsheets, eliminate all the rekeying that we were doing.” They also wanted to avoid building a hard and fast computer infrastructure and continue operating in a cloud-based environment. Summersgill called on the Keystone team to implement an ERP that would integrate the Big Belly Solar business processes with Salesforce so only one set of data would be utilized throughout the entire quote-to-cash cycle.

A Hands-On Approach

STEP ONE: ASSESS AND ANALYZE

Investing the time to learn about the business and thoroughly analyze its processes is a critical part of Keystone’s approach to formulating a custom technology solution. This meant listening to key players and really learning what Big Belly does and how they do it. “I really appreciate the in-depth level of understanding that Keystone has about our business model,” Summersgill said. “I don’t think we would have gotten anywhere near as high quality solution without that detailed level of understanding of the way we do business.”

STEP TWO: FORMULATE A SOLUTION

Together, Keystone and Big Belly evaluated potential ERP systems that would work well with Salesforce in a cloud-based environment. Salesforce plus Netsuite came out as the best solution. “Salesforce and Netsuite were the right tools for us and Keystone was the right partner for us.” Summersgill said. “They remain the subject matter experts when it comes to understanding Salesforce and Netsuite and making them work correctly for our business situation.” As an official partner of both Netsuite and Salesforce, Keystone has an expert level of proficiency in both systems. And their proprietary integration platform quickly and efficiently automates data transactions between the two systems.

STEP THREE: IMPLEMENTATION

Big Belly Solar did not have the staffing or technical expertise in-house to perform the customized implementation of Netsuite and Salesforce. Even though they were a smaller company, “the entire implementation process was far more complex and involved than any of us understood,” said Summersgill. “Keystone was absolutely critical in the translation of business needs into the configuration of Netsuite. That is absolutely a unique value that Keystone brought to the table. If Keystone hadn’t been there, we would have been in trouble.”

Results Measured in Tangible Outcomes

OBJECTIVES MET

The spreadsheet-based collection of systems under which Big Belly Solar used to operate is gone. “Now all of our product data lives in NetSuite and is pushed to Salesforce.” Today, Big Belly Solar sales, accounting, manufacturing and customer service teams access one set of data to generate a quote, order, fulfillment and invoice. The need to rekey data in separate spreadsheets for various uses has been completely eliminated, and along with it increased potential for error.



QUANTIFIABLE ROI

By streamlining business processes and building a technology infrastructure to accommodate future growth at Big Belly, no new staff is needed to keep up with increasing business management functions. "We avoided the need and added expense for at least two full-time people on the accounting side and at least one full-time person on the customer service side," said Summersgill. "I think we have avoided expense in the hundreds of thousands of dollars range."

About Keystone Business Services

Keystone Business Services helps mid-size clients solve their business operation technology problems. From discovery, analysis and development to implementation and post-launch optimization, Keystone designs entity-specific solutions to help clients achieve their business objectives. "Keystone really gave me confidence that they had our best interest at heart that they were going to come up with the right solution for us," said Summersgill. "They're very reliable. Their pricing is very reasonable and appropriate. I feel like we get good value."

Why Keystone Business Services?

- The Keystone Business Services team is trusted for their expertise in helping mid-market businesses leverage the power of cloud computing to streamline processes, reduce costs and support growth.
- Keystone works closely, onsite, with each client to learn the business challenges first-hand.
- From custom demos and on-time implementations to ongoing service support, Keystone delivers expert, one-of-a-kind business process technology solutions.
- Keystone recently was named Top 100 Lead Response Companies 2012 by Forbes Magazine.

The **key** to supported growth is a **stone's** throw away— **Keystone**, your local on-demand software solution and integration partner.

CASE STUDY AT A GLANCE

The Client

- Big Belly Solar provides solar-powered trash compactors, recycling and composting and receptacle systems that use sensors to monitor and report fullness levels in real-time for more efficient waste removal. www.bigbellysolar.com

The Challenge

- Big Belly is a small, but fast growing company that had no formal information technology framework in place.
- A cloud-based a patchwork of disparate systems, including Excel, Salesforce and Quickbooks, couldn't keep up with the escalating demands of the thriving business.

The Solution

- Develop an integrated, cloud-based business management platform to eliminate duplicate data entry, reduce errors and evolve with Big Belly's needs.
- Keystone Business Services designed and implemented customized configurations for Salesforce and NetSuite, and integrated their functions with its proprietary software interface.

The Results

- Keystone Business Services streamlined businesses processes at Big Belly Solar throughout its entire quote-to-cash cycle.
- The resulting efficiencies saved Big Belly from hiring three additional FTEs, which they estimate saved hundreds of thousands of dollars.

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