INTEGRATING NETSUITE AND SALESFORCE IS **GREAT FOR THE HEALTH OF YOUR BUSINESS**

SIKICH

CONTENTS

INTEGRATING NETSUITE AND SALESFORCE INSTEAD OF RUNNING THEM AS TWO DISPARATE SYSTEMS CAN **ENHANCE YOUR COMPANY'S ABILITY TO MAKE DECISIONS AND MANAGE GROWTH, AND GENERATE SUBSTANTIAL COST SAVINGS AND EFFICIENCIES.**

If the integration project is performed well, it can also help many people make a greater contribution to the business. Additionally, you can take advantage of it to align processes, making them faster and more productive. Sikich knows how to complete such integrations to meet your goals, within your schedule and budget.

salesforce gold consulting partner

ORACLE NETSUITE
5 STAR AWARD 2020 ★★★★★

A PLAIN CASE FOR INTEGRATION

Many companies deploy two leading, well-proven cloud solutions to run critical aspects of their business. They use NetSuite as the enterprise resource planning (ERP) platform to manage financial processes and other operations. They rely on Salesforce as the customer relationship management (CRM) application to take care of their most important relationships. Salesforce CRM supports sales, marketing, services, and the management of customer accounts.

The Sikich teams include both a NetSuite and a Salesforce practice. We have implemented and configured NetSuite and Salesforce for hundreds of companies across a great variety of industries. When we see that an organization runs NetSuite and Salesforce as disparate systems, we almost always recommend integrating them. That means many handoffs between individuals and at various stages of processes can truly connect instead of being disjointed. Data flows freely and is visible to people who customarily only have access to either system.

Following an integration, you can automate important transitions. For instance, an order in Salesforce can trigger an invoicing task in NetSuite, which can in turn send a confirmation to Salesforce once that step is complete. For many Sikich clients, order management, invoicing, and access to data are the three main motivators for a NetSuite and Salesforce integration.

NETSUITE CUSTOMERS
169 CLIENTS

SALESFORCE CUSTOMERS
1000+ CLIENTS

WHAT USERS CAN LOOK FORWARD TO

Two outcomes tend to happen practically immediately after the integration.

One, you can **eliminate the error-prone, redundant data entry** that forced employees to spend time unproductively. They can now do more valuable work that is a much better use of their skills.

Two, **reporting and analytics become more meaningful, accurate, and prompt.** Executives and managers can think, plan, and act based on the complete, close-to-real-time data. They can respond to changing business conditions sooner, with greater assurance. Many requests for assistance in retrieving information and creating reports are no longer necessary. The IT team members or other experts who used to provide help by proving data access and reporting can be more productive.

Very often, the integration noticeably benefits Salesforce users first. In many companies, only a relatively small group of executives and finance managers can get into NetSuite to access ERP data, whereas a larger community of sales, marketing, and service execs and managers use Salesforce CRM and the information that resides in it. An integration of

NetSuite and Salesforce could entail, for example, that sales executives can see how their team's results and performance data reflect in the corporate finance system and what they mean in terms of the company's strategic goals and metrics. Or, service managers could review manufacturing and engineering information in NetSuite to understand feature and version details of customers' industrial equipment.

As data visibility also extends in the other direction, finance managers may now be able to review CRM data related to customers, contracts, bookings, and other elements of the business. With an earlier view of financial events, they can make more accurate forecasts. They will have a better understanding of the financial trends that are about to impact the company, such as margins, account performance, revenue projections, collectability, or outstanding and aging balances. Any action or decision by them can be more proactive and timely, unhampered by ambiguity because of doubts regarding the quality and integrity of the data. Sikich consultants often create optimized dashboards, where business decision-makers and planners can see the data that matters to them in a convenient, meaningful format.

ALIGNING DATA, CONNECTING PROCESSES

It is not uncommon for NetSuite and Salesforce users to work with conflicting sets of data. Because of recording errors, process disconnects, conceptual inconsistencies, and other flaws and inefficiencies associated with keeping CRM and ERP separate, the two operational areas can eventually fall out of sync. In some organizations, apps and customizations created by NetSuite and Salesforce managers for their versatile, extensible solutions may deliver valuable functionality to users, but also complicate the technology environment.

Before we integrate NetSuite and Salesforce, we review these process mismatches with our clients and define more efficient ways to enable users, or there is a risk that the technology environment will become more complex and harder to manage. As one important step, we help companies cleanse their data and perform quality assurance to verify that information is accurate and consistent—before we pursue the integration.

74% OF CUSTOMERS EXPECT COMPANIES TO USE EXISTING TECHNOLOGIES IN NEW WAYS TO CREATE BETTER EXPERIENCES

Salesforce State of the Connected Customer Report 2020

73% OF SALES TEAMS SAY THAT COLLABORATING ACROSS DEPARTMENTS IS ABSOLUTELY CRUCIAL T0 THEIR OVERALL SALES PROCESS

[40 Sales Stats You'll Want to Share - Salesforce Blog](#)

CLOSING PROCESS GAPS

We encourage clients to identify the reasons why data in CRM and ERP diverged. These could be timing issues: a transaction is recorded in Salesforce first, and in NetSuite later. Sometimes, business practices may not fully align. For instance, the definition of a customer may not be the same in NetSuite and Salesforce. Before we integrate the two solutions and deliver a single, connected system of record and engagement, we need to bridge process disconnects and address inefficiencies that may be impacting operations. Not doing so would be irresponsible on our part, because we would contribute to worsening inefficiencies and increasing operational costs.

Depending on our findings and clients' preferences, this can take the form of a Sikich Business Process Alignment (BPA) or become a smaller, more tactical effort. The advantage of a BPA is that you can draw on the organizational change management expertise of the Sikich team to refine workflows and process handoffs. That may also involve updating accountabilities and challenging people to think creatively about their roles.

MANAGING FOR THE RIGHT KIND OF CHANGE

Our consultants have the empathy and industry expertise to make change management painless and productive. We know how to assist you in obtaining buy-in from all stakeholders and bringing about the organizational and cultural alignments without which the value of the integration will be limited. We also can help business stakeholders negotiate and collaborate with IT when, as sometimes happens, the IT group has not previously been involved with Salesforce.

ADVANCING WORKFORCE TRANSFORMATION

When we help companies align data and processes and then integrate NetSuite and Salesforce, some jobs may become more enjoyable and interesting when it is no longer necessary to perform duplicate data entry or research and resolve data discrepancies and errors. You may be able to transition finance team members and others who played supporting or clerical roles into business analyst positions, giving them a more strategic function that makes better use of their talent and experience. Similarly, following an integration NetSuite and Salesforce administrators may be able to use their skills to accomplish more for the organization, at a higher level.

When businesses become aware of the positive impact of empowering people who are no longer occupied by basic data management tasks, they may want to provide skills development and training opportunities for them to continue their professional growth. Thus, a NetSuite and Salesforce integration can open a path for workforce transformation with a relatively minor investment.

EMPLOYEES WHO WORK FOR FIRMS THAT MAKE APPS AVAILABLE AND HIGHLY ACCESSIBLE **SPEND 17% LESS TIME ON MANUAL PROCESSES**

Report: The Impact of a Digitally Empowered Workforce

PLANNING ON INTEGRATION BENEFITS

As you think about the potential operational advantages and cost benefits of a NetSuite and Salesforce integration, you should take into account the inefficiencies of redundant data entry and the ambiguities of unreliable, inconsistent information. The savings in cost and time are generally not difficult to project and verify—and they can be substantial. Harder to quantify will be the opportunity costs associated with slow or poorly informed decision-making and business management, but you may be able to gather feedback from your users to document such liabilities.

BOOSTING THE CUSTOMER EXPERIENCE

Improvements in the customer experience may result when, subsequent to a NetSuite and Salesforce integration, employees in your sales and service groups can be more responsive and provide answers or resolve issues more efficiently and reliably than they did before. They will probably reflect in your metrics for customer satisfaction and retention, customer lifetime value, Net Promoter Score, and similar values.

ENHANCED SCALABILITY

Once you align roles and processes and integrate CRM and ERP systems, your operation may become greatly more scalable. For many of our clients that means they can more easily manage their growth, acquire more customers, manage more transactions, expand their portfolio of products and services, or generate more revenue at better margins. They can move faster and with greater agility in response to strategic or market changes. Their infrastructure costs and other overhead may be a fraction of what they have been with the previous, disparate software systems, missing process handoffs, and inefficiencies.
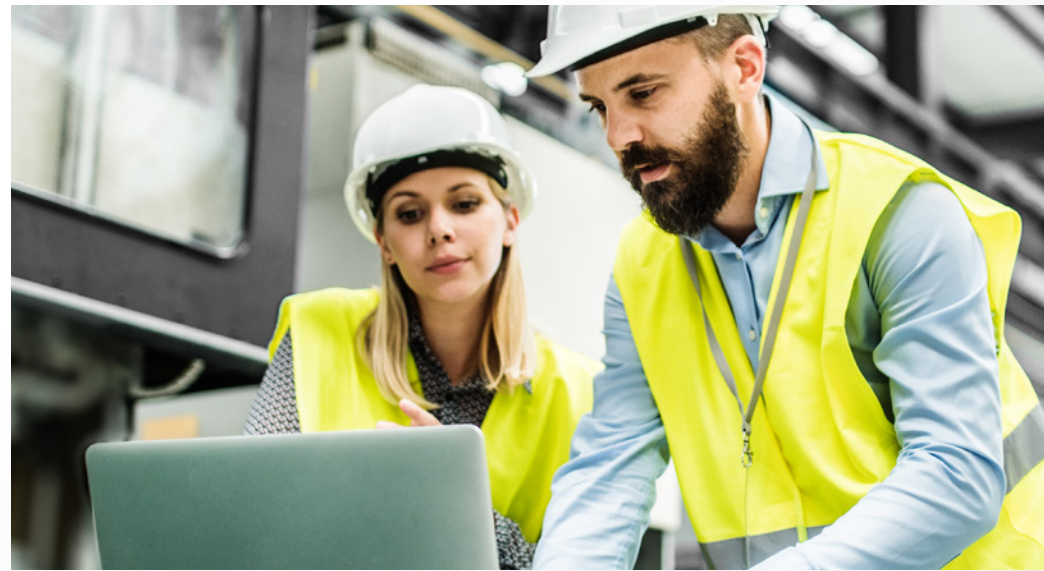
EASIER, MORE MEANINGFUL COMPLIANCE AUDITS

Especially for public companies or organizations that need to follow demanding regulatory mandates, integrating NetSuite and Salesforce can make compliance simpler and less risky. External and internal auditors will find it easier to test contracts and activities such as invoicing or how a company recognizes revenue. Instead of just testing transactions in NetSuite ERP, they may also be able to test processes that begin in Salesforce CRM and eventually impact financial documents and data in NetSuite. With a greater range of testing and a higher level of auditor confidence, compliance audits can become more meaningful and reliable.

HOW SIKICH PERFORMS INTEGRATIONS

Business user needs should determine what exactly a NetSuite and Salesforce integration looks like and how it should deliver unimpeded data flows and information access. Both NetSuite and Salesforce have their respective strengths, and Sikich experts know how to build on them when we perform an integration project. We use a variety of proven tools, together with our own development resources, to realize these integrations. Many excellent middleware software products can be helpful in achieving this, and the best choice usually depends on which one fits a client's requirements and goals most closely.

FAST PROJECT PACE INCLUDES INTEGRATION AND COMPLEMENTARY WORK

From beginning to end, a NetSuite and Salesforce integration project performed by Sikich usually takes close to four months. That time includes our research, fact finding, and a BPA in addition to the actual integration and handoff to you. Many clients think further when they see the improvements they can realize as a result of the integration. They begin to wonder about the advantages of connecting other applications to NetSuite and Salesforce. Within the same four-month period, Sikich often performs additional integrations of business systems that become more valuable connected than stand-alone. Many times, our consultants also build Salesforce Communities within the scope of an integration project, making it possible for clients to securely share content and collaborate with customers and trading partners.

PROVEN APPROACHES AND BEST PRACTICES

At Sikich, we feel strongly about repeatable, streamlined processes that keep our clients' projects on track and their costs within planned budgets. We approach NetSuite and Salesforce integrations with sound methodologies and manage them to achieve the results you want to see. You can rely on Sikich to perform a successful integration project and take care of your other technology needs with equal success, no matter whether you are concerned about infrastructure, client computing, cybersecurity, or the best possible cloud strategy. Once we know your business and understand your objectives, we will always share our insight internally and apply learnings to subsequent efforts on your behalf. Sikich also offers business consulting and advisory services that can augment our work on your technology systems.

MANY CLIENTS THINK FURTHER WHEN THEY SEE THE IMPROVEMENTS THEY CAN REALIZE AS A RESULT OF THE INTEGRATION

FROM THE INTEGRATION FRONTLINES

NetSuite and Salesforce integrations are one of our more in-demand engagements. One is in progress at almost any time. Here are two scenarios from our recent experience.

RAPID ROUTE TO REVENUE

We worked with a high-tech manufacturing and services organization that wanted to streamline a needlessly complex order-to-cash process. Once we integrated the company's NetSuite and Salesforce, things became easier.

Today, account reps perform the initial pricing and quoting in Salesforce. Based on the opportunity information, Salesforce automatically begins designing a project. Finalized pricing and resourcing take place in NetSuite, and flow into Salesforce to support the final contract negotiations.

Once the customer signs an agreement, this is first recorded in Salesforce, and the information flows into NetSuite for revenue recognition and automated billing. In turn, payment information and project status updates from NetSuite are reflected in Salesforce to give everybody full visibility.

FULL VISIBILITY WITHOUT UNPRODUCTIVE TIME

In another project, we performed an integration to help a distribution company manage inventory levels and subscription invoicing more easily. Managers were resigned to their disconnected systems and relied on spreadsheets to see their data.

In Salesforce, the reps can now create new quotes from upsell opportunities and new leads. They consider customers' inventory levels as well as channel partner sales. We created free-flowing data streams between Salesforce and NetSuite for several important areas:

- Subscription start and end dates
- Inventory demand
- Field-service requirements
- Renewals
- Upsell proposals
- Shipping status

People promptly found it easier to review information. They no longer need to spend time searching for data in multiple systems in order to keep their spreadsheets updated.

TAKING THE NEXT STEP

After Sikich has completed your NetSuite and Salesforce integration, your team can continue to manage the technology environment. Alternatively, you can contract with us to do so, or we can provide support for specific concerns. We have performed many NetSuite and Salesforce deployments and integrations, gaining a wealth of expertise that is not commonly present in corporate IT teams. We can make modifications in data flows or processes supported by the integrated solutions without needless complications and unwanted side effects.

Clients often request us to provide more strategic, longer-term guidance for their technology planning and acquisitions. Many of them contract with Sikich for IT managed services or collaborate with a Sikich virtual CIO (vCIO).

If you want to find out more or want to pursue an integration of NetSuite and Salesforce:

• Contact us at info@sikich.com or call us at 877.279.1900 to talk with our solution experts.

• Learn about Sikich CRM and ERP services.

• Follow us on LinkedIn, Twitter, and Facebook.

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ABOUT SIKICH

Sikich is a leading professional-services firm that is among the top 1 percent of all enterprise resource planning solution partners in the world and ranks as one of the United States' Top 30 CPA Firms. Sikich is also ranked as number 9 in the country's top 100 technology providers. To every project, Sikich ERP and CRM experts contribute more than 35 years of team experience and an outstanding track record with a success rate of 97 percent. Sikich partners with the industry leaders, including Microsoft, NetSuite, Salesforce, and SonicWALL. Sikich is a Salesforce Gold Partner, Microsoft Gold and Microsoft Dynamics Inner Circle Partner focused on delivering technology solutions for tangible business improvement and organizational excellence.

To learn more about Sikich, go to **www.sikich.com/technology** or contact **info@sikich.com**.