

The NetSuite Optimization Playbook

WHERE CONFIGURATION MEETS AI FOR
MORE EFFICIENT, LOWER-COST OPERATIONS

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An E-Book Guide to
NETSUITE

For Professionals:
CEOs, CFOs, SOs, COOs, VPs/Op. Directors

Presented by
TRAJECTORY GROUP



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EXECUTIVE SUMMARY

Is your NetSuite instance working for you, or are you working for it?

For most mid-market and Private Equity-backed companies, the NetSuite journey ends at go-live. The reality is that without continuous optimization, your ERP becomes a patchwork of manual workarounds, brittle customizations, and stale reporting. This digital friction doesn't just create inefficiency; it actively slows growth, masks critical business risks, and inflates operating costs.

This playbook is designed for leaders who demand more from their core technology investment. We will identify the most common and costly pain points we see in NetSuite environments today. More importantly, we will map them to a clear set of solutions, from high-impact configuration changes that deliver immediate ROI to strategic AI-led assessments that unlock structural value.

This guide provides a practical framework to capture measurable improvements through Trajectory’s Continuous Optimization & Managed Services and our AI Assessment & Execution offerings, transforming NetSuite from a reactive tool into a proactive engine for growth.

Table of Contents

1. Chapter 1: The Top NetSuite Pain Points Executives Can't Afford to Ignore.....	p. 3
2. Chapter 2: The Fast Track to Value: High-Impact Configuration Win.....	p. 5
3. Chapter 3: The Multiplier Effect: Where AI Creates Value.....	p. 7
4. Chapter 4: The Executive Checklist & Your Next Steps.....	p. 8

CHAPTER 1:

THE TOP NETSUITE PAIN POINTS EXECUTIVES CAN'T AFFORD TO IGNORE

These challenges are business problems that directly impact cash flow, operational agility, and strategic decision-making.

- **Siloed Operations and Undefined Business Processes**
 - **The Business Impact:** Causes significant revenue leakage through incorrect invoicing, erodes customer trust due to service delivery failures, and creates internal friction that leads to duplicated effort and employee burnout.
 - **Why It Happens:** Processes are based on tribal knowledge rather than documented workflows. A lack of clearly defined roles, responsibilities, and system hand-offs between departments like Sales, Operations, and Finance leads to critical steps being missed, duplicated, or incorrectly executed.
- **Fragmented Record Creation & Data Entry Errors**
 - **The Business Impact:** Delayed orders, costly invoice disputes, a longer cash conversion cycle, and bloated headcount dedicated to manual reconciliation.
 - **Why It Happens:** Over-reliance on manual PDF data entry, inconsistent CSV imports, and weak data validation rules create a constant influx of duplicate, incomplete, or incorrectly mapped records that require costly human intervention.
- **Manual and Brittle Order-to-Cash (O2C) / Procure-to-Pay (P2P) Processes**
 - **The Business Impact:** Friction between sales, operations, and finance teams; missed early payment discounts or customer credits; and fundamentally weaker working capital controls.
 - **Why It Happens:** Aging custom scripts and disparate point solutions that were never designed to scale, combined with persistent role and workflow misconfigurations. at fail to meet compliance standards.

- **Poor Reporting, KPI, and Dashboard Fidelity**

- **The Business Impact:** Critical decisions are delayed or based on gut feeling, forecast accuracy plummets, and the organization remains shackled to offline spreadsheets for its most important analysis.
- **Why It Happens:** A proliferation of incorrect saved searches, broken dashboards that users abandon, and data model drift caused by a web of custom fields and inconsistent segments.

- **Crippling Technical Debt in Customizations**

- **The Business Impact:** The cost to implement even minor changes is prohibitively high, development cycles stretch for months, and a pervasive fear of "touching" core workflows stifles innovation.
- **Why It Happens:** Years of undocumented scripts, a lack of automated code-analysis, and no centralized governance or change management process.

- **Integration Failures and Data Synchronization Gaps**

- **The Business Impact:** Mismatched customer or inventory records, rampant double entry, and reconciliation nightmares across your key platforms (e.g., CRM, WMS, billing systems).
- **Why It Happens:** Fragile point-to-point connectors, an architecture that isn't retry-safe, and insufficient error-handling logic that lets problems fester silently.

- **Low User Adoption and Support Bottlenecks**

- **The Business Impact:** Users inevitably create ad-hoc processes outside of NetSuite, increasing operational risk, creating data silos, and fundamentally undermining the system's ROI.
- **Why It Happens:** Inadequate initial training, a lack of on-demand conversational support, and unclear or overly restrictive role permissions that hinder productivity.

- **Compliance, Security, and Audit Readiness Gaps**

- **The Business Impact:** Significant risk uncovered during due diligence, failed financial audits, and delayed M&A activity for PE-backed portfolio companies.
- **Why It Happens:** Poor segregation of duties (SoD), undocumented manual processes, and inconsistent data backup or retention policies that fail to meet compliance standards.



CHAPTER 2:

THE FAST TRACK TO VALUE: HIGH-IMPACT CONFIGURATION WINS

Before considering complex projects, significant value can be unlocked through expert-led configuration. These are the fast, low-cost wins that deliver immediate ROI.

- **Enforce Data Quality at the Source**

- **Actions:** Implement stricter field validation rules, make critical fields mandatory, standardize dropdown lists to eliminate ambiguity, and activate automated duplicate detection.
- **Expected Impact:** Dramatically fewer exceptions, lower manual cleanup effort, and faster, cleaner order processing from day one.

- **Simplify and Standardize Workflows**

- **Actions:** Rationalize and consolidate redundant workflows, clean up the library of saved searches, and implement role-based dashboards and homepages for key teams.
- **Expected Impact:** Faster user onboarding, fewer role-based conflicts, and clearer accountability across every process.

- **Optimize Core Order-to-Cash Flows**

- **Actions:** Tightly align Sales Orders, Fulfillments, and Billing using NetSuite's native workflows. Reduce manual invoice creation and automate revenue recognition where applicable.
- **Expected Impact:** Accelerate cash flow by shortening Days Sales Outstanding (DSO) and reduce revenue leakage from fewer billing disputes.

- **Streamline Cash Management with Automated Banking & Payments**

- **Actions:** Activate NetSuite's Bank Feeds SuiteApp to automate the import of bank data. Implement automated collections reminders (dunning) and enable a customer payment portal. Configure the Electronic Bank Payments module to process vendor payments (e.g., ACH, EFT) directly from the ERP, governed by approval workflows.
- **Expected Impact:** Gain a real-time daily view of cash positions, slash month-end close times by automating bank reconciliations, and improve working capital by reducing DSO. This enhances financial control and significantly reduces fraud risk compared to manual check runs.

- **Improve Reporting and KPI Accuracy**

- **Actions:** Rebuild and certify key saved searches, refactor executive dashboards to show what matters, and implement source-of-truth financial reports with strict naming and versioning conventions.
- **Expected Impact:** Faster, more confident executive reporting and a measurable increase in forecasting accuracy.

- **Harden Roles & Permissions for Compliance**

- **Actions:** Implement a robust segregation of duties (SoD) framework, clean up role proliferation, and schedule mandatory quarterly access reviews.
- **Expected Impact:** Achieve audit readiness and significantly lower insider risk.



CHAPTER 3:

THE MULTIPLIER EFFECT: WHERE AI CREATES VALUE

When your optimization needs to go beyond configuration, a structured AI Assessment paired with expert execution uncovers deep-seated issues and delivers scalable, transformative results.

- **Automated Document Ingestion with Initus Accelerators**

- **Use Case:** Automatically extract line-item data from incoming vendor invoices, purchase orders, or sales order PDFs to create NetSuite records without human touch.
- **Benefit:** Eliminate manual data entry, accelerate transaction processing by orders of magnitude, and slash costly human-error exceptions.

- **Automated Code Analysis & Documentation**

- **Use Case:** Programmatically scan your entire library of SuiteScript and custom code to map dependencies, identify redundant or inefficient logic, and surface hidden risk points.
- **Benefit:** Enable faster and safer code refactoring, systematically lower technical debt, and improve change planning and resource allocation.

- **Use-Case Discovery via Structured AI Assessment**

- **Use Case:** A formal review that quantifies optimization opportunities across finance, operations, and sales by identifying patterns in manual effort, exception rates, and outlier transactions.
- **Benefit:** Delivers a prioritized, data-driven roadmap with a clear estimated ROI and a practical execution plan for each initiative.



CHAPTER 4:

THE EXECUTIVE CHECKLIST & YOUR NEXT STEPS

Ask your team these 10 questions to prepare for a productive Health Check discussion:

1. When was our last formal NetSuite health check or optimization engagement?
2. How many full-time employee hours are spent on manual document processing each week?
3. Do we have a current, documented inventory of our custom scripts and their business owners?
4. How many critical integration exceptions occurred last month, and what was the average time to resolution?
5. Are our key financial dashboards actively maintained and fully trusted by the CFO and finance team?
6. What is our current Days Sales Outstanding (DSO) and average order-to-invoice time?
7. Do we have formal Segregation of Duties controls and a scheduled access review process?
8. Are we using any OCR or AI-powered tools today to reduce manual data entry?
9. What is our monthly volume of NetSuite support tickets per 100 users?
10. If we ran an AI Assessment, what are the top 3 business outcomes you would expect to see?

YOUR PATH **FORWARD**

The answers to these questions will illuminate your path. Trajectory provides three clear engagement models to match your urgency and strategic goals.

Fast Option (30 Days)

Book a NetSuite Health Check. We'll immediately tackle your most pressing issues by fixing saved searches, hardening validation rules, and building high-visibility dashboards to deliver quick wins, while also identifying workflows and optimization opportunities for longer-term impact.

Strategic Option (60-90 Days)

Launch an AI Assessment. We will identify manual processes suitable for automation across enterprise systems, including NetSuite and related platforms, and deliver a data-backed roadmap to prioritize high-ROI automation use cases like OCR data ingestion, code analysis, and conversational support, followed by phased execution.

Ongoing Option

Transition to Trajectory Managed Services. Let our team provide continuous optimization, proactive monitoring, and executive reporting, powered by our suite of Initus AI accelerators.

Ready to transform NetSuite from a cost center into a competitive advantage? Contact us today to learn more about our Continuous Optimization & Managed Services and AI Assessment & Execution Services.



For growth-focused teams and Private Equity sponsors, Trajectory delivers client-centric enterprise application solutions across Salesforce, NetSuite, Integrations, and AI, bridging pre-acquisition due diligence with scalable post-acquisition execution. We blend strategic clarity with hands-on delivery, ensuring operational value from day one. With a global presence, we bring 18 years of experience and have completed over 450 successful implementations.

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