

The 90-Day NetSuite Optimization Plan:

Your Blueprint for
Measurable Results

Audience : CEO, CFO, CSO, COO, VP/Director of Operations

trajectory



FROM PLAN TO PROFIT IN ONE QUARTER

This plan outlines how to efficiently optimize your NetSuite instance.

A successful optimization initiative is not an endless, undefined project. It is a focused, 90-day sprint with clear phases, concrete deliverables, and measurable business outcomes. This document outlines Trajectory's proven 30/60/90-day optimization plan, designed to move your organization from assessment to tangible ROI within a single business quarter. This is your guide to overseeing a plan that delivers faster, cleaner, and lower-cost operations.



PHASE 1: DAYS 1-30

STABILIZE & CAPTURE QUICK WINS

The goal of the first month is to build momentum by delivering highly visible improvements that reduce manual work and improve data quality immediately.

■ Weeks 1-2: The NetSuite Health Check & Triage

- **Activities:** Our team conducts structured process interviews with key stakeholders from the finance, sales, and operations teams. We perform a technical audit of your configuration, saved searches, dashboards, and code inventory.
- **Objective:** To move from anecdotal complaints to a data-driven diagnosis of your key pain points.

■ Weeks 3-4: Quick Win Execution

- **Activities:** Based on the Health Check findings, we execute a list of pre-approved, high-impact fixes. This typically includes rebuilding the top 5 most critical (and broken) saved searches, implementing 3-4 crucial data validation rules to prevent bad data at the source, and deploying an "Exceptions Dashboard" for managers to monitor issues in real-time.
- **Objective:** To deliver immediate relief to end-users and provide leadership with a trusted, forward-looking view of operational health.

■ Key Deliverables at Day 30:

- **An Annotated Risk/ROI "Heat Map":** A visual guide showing which processes carry the most risk and offer the greatest opportunity for improvement.
- **A "Top 10" Quick Fix List:** Documenting the changes made and the immediate impact.
- **Baseline KPI Dashboard:** Establishing the starting-point metrics for days sales outstanding, order processing time, and manual reconciliation hours.



PHASE 2: DAYS 31-60

AUTOMATE & REDUCE MANUAL WORK

With a stable foundation, the second month focuses on eliminating repetitive, low-value tasks and de-risking your technical environment through intelligent automation.

■ Weeks 5-7: Process Automation Deployment

- **Activities:** We deploy our Initus accelerator, InitusIDP (Intelligent Document Processing), that facilitates automated document ingestion for your highest-volume document types (e.g., vendor invoices or sales orders). Concurrently, we standardize and streamline the core order-to-cash workflow to reduce manual handoffs.
- **Objective:** To achieve a measurable reduction in manual data entry and processing time, freeing up your team for higher-value work.

■ Week 8: Technical Debt Triage & Governance

- **Activities:** We initiate an automated code analysis to scan and document your entire SuiteScript inventory. At the same time, we begin the role & permissions cleanup project, consolidating roles and implementing a SoD (Separation of Duties) framework.
- **Objective:** To gain full visibility into your custom code landscape and harden your security/compliance posture.

■ Key Deliverables at Day 60:

- **Live Automated Ingestion:** A functioning PDF-to-NetSuite record workflow for invoices and/or SOs.
- **Documented Script Inventory & Risk Assessment:** A complete catalog of your customizations, flagged for risk and redundancy.
- **Role Cleanup & SoD Plan:** A clear report on roles rationalized and the new governance framework.
- **Updated KPI Dashboard:** Showing a measurable decrease in order processing time and manual work hours.



PHASE 3: DAYS 61-90

SCALE & FUTURE-PROOF

The final month is dedicated to scaling the gains, empowering users with next-generation tools, and establishing a long-term strategic roadmap.

■ Weeks 9-10: Enhancing User Experience & System Stability

- **Activities:** We deploy a pilot of our conversational AI support assistant to a target user group (e.g., the AP or AR team). In parallel, our technical team hardens critical integrations with retry-safe architecture patterns to prevent data-sync failures.
- **Objective:** To improve user self-sufficiency, reduce support ticket volume, and ensure the reliability of your connected systems.

■ Weeks 11-12: Strategic Refactoring & Handover

- **Activities:** We refactor the top 1-2 highest-risk scripts identified during the code analysis in Month 2. We then consolidate all project learnings into a final document and a strategic roadmap outlining recommended initiatives for the next 6-12 months.
- **Objective:** To proactively eliminate technical risks and provide you with a clear, long-term vision for continuous improvement.

■ Key Deliverables at Day 90:

- **AI Assistant Pilot Report:** Metrics on user engagement and ticket reduction.
- **Integration SLA Metrics:** Performance and reliability benchmarks for key data flows.
- **Operational Guide:** A complete guide for managing the newly optimized processes.
- **Strategic 6-12 Month Roadmap:** A prioritized plan for your next phase of optimization.



MANAGING THE ENGAGEMENT RESOURCES & RISK MITIGATION

A successful sprint requires the right team structure and a proactive approach to risk.

■ Typical Engagement Model:

- **Execution Pod:** A dedicated team including a Project Manager, NetSuite Architect, Developer, and specialist resources (e.g., Data Engineer, AI Specialist) as needed.
- **Governance:** Weekly/bi-weekly check-ins with executive sponsors to review progress against KPIs and a clear change management protocol.

■ Key Risks & Mitigation Strategies:

- **Risk:** Breaking critical customizations during refactoring.
 - ▲ **Mitigation:** Our process mandates automated code analysis, thorough testing in dedicated staging environments, and formal user acceptance testing (UAT) before deployment.
- **Risk:** Change resistance from end-users.
 - ▲ **Mitigation:** We start with role-based pilots for new technology and provide targeted training sessions focused on *"what's in it for me."*

■ Your First Step

In 90 days, you can fundamentally change the ROI of your NetSuite investment. By following this structured plan, you can move from a state of reactive firefighting to one of proactive, data-driven optimization.

The journey begins with the NetSuite Health Check. Let's schedule a call to scope your Day 1-30 plan and start building the business case for transformation.



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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