

## Case study

### SuiteSuccess implementation results in scaleable ERP for growing software organization



## Waterford

For more than 40 years, the nonprofit Waterford.org has developed award-winning early learning programs with adaptive software, innovative technologies, and personalized support. Over the decades, Waterford has grown to serve hundreds of thousands of children—especially at-risk populations—across the nation.

As many fast-paced technology companies encounter, a growing business means complex and often changing needs. Waterford required an enterprise resource planning (ERP) system that could scale with them as they developed new software products and expanded into new markets, while handling the compliance for each. Seeking guidance on this large initiative, Waterford took advantage of the Chartered high-touch, personalized approach to assist them in this process.

Chartered guided the Waterford Institute through their NetSuite implementation ensuring the right features were enabled to gain full benefit from their ERP system.

## How Chartered helped

Realizing they needed to update their legacy ERP system, Waterford extensively searched for the right system to meet their needs. After careful consideration, Waterford determined NetSuite would offer them the functionality needed to run their business efficiently. However, recognizing the challenge in configuring NetSuite to their unique business needs, Waterford enlisted the services of Chartered to help them evaluate the robust options offered by NetSuite to arrive at the desired design.



“It was very challenging to determine the best combination of tools and services that we needed from NetSuite to solve our problems, which is where Charted really excelled. Charted was very patient in that process, in helping us arrive at the best decision possible.”

**Tom Ness**  
CFO

“I had great success previously with NetSuite and I admire greatly the architectural implementation and its flexibility that it can be whatever you need it to... It affords great customization at an affordable cost.”

**Tom Ness, CFO**

A significant goal of the implementation was finding the best solution to manage subscriptions and renewals and comply with an ever-changing, complex set of reporting requirements for tracking expenses and revenue. It was also essential to create a process to manage the software support needed from their technology offering. In addressing these needs, Charted assisted in implementing NetSuite’s Contract Renewals module, along with Subscription Billing and Advanced Revenue Management. These solutions provided Waterford with the functionality they required: maintaining flexibility and allowing them to scale.

## Project-at-a-glance

- ◆ Preliminary assessment of pain points and needs
- ◆ Project planning and ERP roadmap
- ◆ Project management
- ◆ SuiteSuccess implementation of NetSuite
- ◆ Data migration planning and execution
- ◆ Post go-live support

Furthermore, Waterford wanted to ensure that the implementation of NetSuite allowed for future enhancements to their technology portfolio, including an integration with Salesforce.com. Charted was able to understand their specific needs and propose the best setup to enable future enhancements. Once the tools were selected and path forward outlined, the implementation itself took just three months. Waterford was able to replace their legacy ERP system with a scalable solution that aligned with their mission and incorporated the capabilities needed for their evolving business



“I could not be happier with the experience. Right from the beginning there was constant communication and very clear outlines of what to expect. The Chartered team was always available to answer any questions we had.”

**Jessican Lister**  
Corporate Controller

## Project implementation and results

- ◆ General Ledger
- ◆ Purchasing and Accounts Payable
- ◆ Sales Orders and Billing
- ◆ Advanced Revenue Management
- ◆ Contract Renewals

## Software and non-profit specialization

Through a SuiteSuccess implementation designed for non-profit organizations, combined with unique software organization requirements, Waterford was able to quickly gain benefit from pre-configured options popular in their line of business. Through the use of SuiteKeys, functionality developed to easily enter a combination of financial segments for transactions, the time to run reports decreased from hours to just minutes. With increased visibility and insight into their business, information is now accessed and shared quickly and accurately.

Combining non-profit tools with contract modules has allowed the team to access billing and revenue in minutes instead of hours and also saved valuable time by reducing manual entry. As Waterford moves forward with NetSuite, the business benefits continue to become apparent.

## Success metrics

- ◆ Full ERP migration in 12 weeks
- ◆ Improved access to information
- ◆ Readily available business metrics
- ◆ Faster financial reporting

To learn more about Chartered NetSuite Managed Services: implementations, data migration, execution, and customization design and development, click [here](#).

ORACLE  
**NetSuite**  
Alliance Partner