

## Case study

**Matter Surfaces transformed into an adaptable organization using Chartered and NetSuite**

The logo for Matter, featuring the word "matter" in a bold, lowercase, serif font on a white background.

## Matter Surfaces

Founded in 1971 as Mats Inc., the company started their business selling custom matting solutions for commercial buildings. Eventually, their customers started asking them to help with interior products – and over the years they moved “beyond the entryway” to curate a product portfolio focused on sustainable interior surfaces that support wellness and great design. After being in business for over 50 years, the company rebranded as Matter Surfaces in 2021 to reflect who they are today. The company is based out of Massachusetts and serves thousands of customers nationwide.

Over the years, Matter Surfaces utilized an on-premise enterprise resource planning (ERP), as well as a few other different systems to manage their business processes. As the business grew, the company started customizing the system to fit their needs. While these customizations worked in the short term, performance issues emerged over time, and they were forced to use third-party applications to bridge the gaps. After several lengthy and costly upgrades, the company realized that their legacy system was a roadblock in their expansion plans. So, they decided to look for a cloud ERP solution that would enable them to scale more effectively.

After a thoughtful evaluation of several SaaS platforms, NetSuite emerged as the clear winner given its performance, scalability, and adaptability it can bring to ongoing changes. As they embarked on their ERP journey, Matter Surfaces searched for a partner to help guide them through the implementation process. With a lean finance and IT department, they knew they needed a hands-on partner that would offer best practices and provide thoughtful NetSuite design recommendations.



“The Charted team did an outstanding job with the overall implementation, and particularly with project management. They worked with us to define business processes that aligned with our goal to “keep it simple.” They also held weekly check ins with our team to review progress and keep us on track. The experience was highly collaborative from start to finish.”

**Lynn Druan**  
Chief Financial Officer

“Our initial implementation started before COVID. When COVID hit, we decided to press on in no small part because of our partnership with Charted. We just knew we were in good hands with their team and that we could make it work with their guidance.”

Lynn Druan, Chief Financial Officer

## How Charted helped

Matter Surfaces came to Charted, formerly SquareWorks Consulting, with an open mind about adjusting processes to use NetSuite out of the box functionality as much as possible. Additionally, the company set a goal to drastically reduce the use of Excel, as well as establish KPIs to measure business results more effectively. Charted worked closely with Matter Surfaces and delivered a comprehensive strategic plan to implement a solution that provided the data visibility, transparency, and simplicity that they were looking for.

## Projects at-a-glance

- ◆ Personalized assessment of business and NetSuite needs
- ◆ Project planning and project management
- ◆ Integrations and customizations
- ◆ Data migration assistance
- ◆ Delivery of an end-to-end business solution in NetSuite
- ◆ Implementation and go-live

Charted collaborated with Matter Surfaces to gain a better understanding of their business and how they operate in order to execute the full scope. Matter Surfaces works through multiple market channels and does a lot of custom work for clients, which makes their business fairly complex. Charted Project Governance Framework helped the team navigate through the complexity to develop core business process definitions.



“The Charted team helped us understand how customizations would fit into the overall NetSuite picture. They helped us map out how the business should flow and kept us aligned on customizations to keep things as simple as possible.”

**Lynn Druan**

Chief Financial Officer

## Integrations and customizations

Charted assisted Matter Surfaces with third-party applications including PACEjet and Warehouse Management Systems (WMS) and worked together to seamlessly connect these in NetSuite. PACEjet, an enterprise multi-carrier shipping software, enabled Matter Surfaces to save money through fulfillment automation, which also meant faster shipping and better customer service. WMS provided real-time data so Matter Surfaces could track their products from arrival to shipment.

Charted helped monitor all integrations and attended calls to ensure that the functional design of third-party applications was in line with the overall design in NetSuite. The Charted team also helped with status and timeline updates, as well as holding third-party teams accountable for the deadlines they committed to.

“The Charted team was great at facilitating and explaining how NetSuite works in order to get PACEjet, and other partners, moving in the right direction and ensure that everyone was fully aligned with the right design.”

Julie Nadeau, Business Analyst and NetSuite Implementation Lead

Charted worked very closely with Matter Surfaces on vetting any potential customizations of NetSuite to make sure that these would provide the desired value without creating roadblocks in the future. Only a small number of customizations passed the test and were developed by Charted. Others were discarded and Matter Surfaces agreed to adjust their business processes slightly to make things work.

## Implementation and go-live

After Matter Surfaces went live with NetSuite, they quickly found value in the solution. While they previously relied on legacy systems and Excel, Matter Surfaces could now take advantage of an established system for ad-hoc reporting. With NetSuite, they adopted dashboards with different KPI's for different users, which opened a whole new level of transparency.

For the sales team, there is now increased visibility into their monthly quota or budget. Prior to NetSuite, the sales team used PowerPoints to conduct quarterly business reviews. Now, they leverage dashboards in NetSuite to provide real-time data during these reviews. For the leadership team, they are now able to run reports around inventory management, demand planning, stock allocations, and commissions and make informed decisions based off this data.

"NetSuite highlights where mistakes are happening in real time. With transparent data, we're able to pivot much more quickly so we can catch errors before they spiral into real problems. The system is having a very positive impact on the business."

Lynn Druan, Chief Financial Officer

## Results and transformation

With the NetSuite go-live, Matter Surfaces transformed into a more adaptable organization. The switch from their legacy systems to NetSuite means they not only have a single transparent solution, but they have also brought significant improvement around data accuracy and reliability. From a sales perspective, Matter Surfaces can close sales much faster given the ability to quickly provide quotes to customers and then convert those to orders at the push of a button. It's translating into higher revenue and faster growth.

"Working with Charted was a great experience. They had everything our team was looking for in a partnership to help us implement NetSuite. System transitions are very challenging in the best of times. Our transition took place during COVID and we were extremely lucky to have such a knowledgeable, organized, collaborative partner in Charted. While our internal team did outstanding work during the process, we simply could not have completed the transition as successfully as we did without Charted."

Barry Hume, CEO



Matter Surfaces is continuously looking for ways to improve their business and often seeks guidance from the Charted team through their Premium Support Plans. These plans provide a dedicated functional consultant to assist them on an ongoing basis with any NetSuite administrative requests. The guidance from the premium support team allows Matter Surfaces to make better business decisions, while continuing to grow and transform into an adaptable organization. To learn more about NetSuite Managed Services and Premium Support, please click [here](#).

To learn more about Charted NetSuite implementation projects, click [here](#).

ORACLE  
**NetSuite**  
Alliance Partner