

Case study

Rebuilding NetSuite to meet the needs of a growing corporation



Carbonite

Carbonite is a leader in the high growth business data protection market. The company has rapidly expanded its data protection platform through a combination of internal development and an acquisition based growth strategy. Each new acquisition brings new technology and new opportunities to protect the critical data for customers; unfortunately, each acquisition also comes with another enterprise resource planning (ERP) system that needs to be integrated.

"We were really impressed with the Chartered thought process, project plans, and workflow management. They highlighted areas of concern and differences between expectations and actual system deliverables."

Andrew Schwendenman, Corporate Controller

In 2016, after the asset purchase of EVault, Carbonite contacted Chartered, formerly SquareWorks Consulting, for migration and integration assistance. The company wanted to transition its family of disconnected ERP solutions and run the company on the NetSuite platform. NetSuite fulfilled Carbonite's requirements: it was cloud-based, supported multiple entities and currencies, and could scale with the company's expected growth. Chartered provided best in class services to ensure a successful transition to NetSuite.

How Chartered helped

Carbonite was operating on another ERP solution, which was not fulfilling the evolving needs of a growing company. The asset purchase of EVault included

the NetSuite operating environment. Carbonite recognized that running autonomous systems would continue to cause unnecessary inefficiencies and expense. Integrating into their current ERP solution wasn't an option, but migrating Carbonite onto NetSuite was. Charted led Carbonite to rethink how they wanted to structure their financial system and provided a realistic and comprehensive plan to reach the desired end state.

Project at-a-glance

- ◆ Functional consulting
- ◆ Financial data migration
- ◆ Three NetSuite integrations
- ◆ Critical customizations: Approval workflows
- ◆ User acceptance testing and training



“Charted came in with the specialized skills we needed for the migration. The level of detail provided was clear and the training offered was huge. Charted was prepared and focused.”

Padmini Maniraja
Director of IT

The project posed a complex situation where two active systems would merge into one. Typically, there is one empty system that is configured to specifications and all data flows into it. In this case, the NetSuite system was pre-configured to meet EVault's business and needed to be modified to accommodate the needs of Carbonite. Additionally, both companies had multiple entities across the globe, increasing the challenge further.

Charted went through an extensive analysis and design phase with Carbonite to begin the project. Roundtable discussions with various teams revealed the current state of affairs and the desired state of business processes. Charted took the desired processes and precisely mapped them to NetSuite's functionality. The result was a well-defined set of processes and a blueprint for the required configurations in NetSuite.

Project implementation and results

The Charted team brought a broad range of migration experience to the Carbonite project. Over the course of many months and several phases, the team planned and coordinated the entire data migration process. The scope of migration was significant and covered multiple entities: 36 Months of Journal Entries, Customers, Open Accounts Receivable, Vendors, Open Accounts Payable, and Fixed Assets.

Once migration was complete, the Charted team worked with a third party to design and deploy several integrations with NetSuite including: Subscription Billing Software, Planning & Budgeting Tool and Bank statement import for Cash Reconciliation. Charted was also tasked with implementing critical banking and workflow customizations in the new system.

Success metrics

- ◆ Mapping of business processes and needs
- ◆ User acceptance testing
- ◆ Workflow management and timeline adherence
- ◆ Critical customizations
- ◆ Pre-launch coordination

Custom-made user acceptance testing and training was performed throughout the project. Testing by user role served as an early opportunity for users to familiarize themselves with the system and track any necessary corrections that needed to be made and re-tested.

More than 15 stakeholders were involved in the go-live cutover which was executed over a weekend. The transition was smooth and without critical issues. Ongoing support, provided by Charted, has helped the Carbonite team ensure any system issues were properly discussed and operations met expectations.

The NetSuite implementation has helped Carbonite remove one full business day from their monthly closing process. As Andrew Schwendenman, Corporate Controller summed up, "We are building and leveraging the system [NetSuite] to get the data we need. We are now in a position to make significant strides forward."

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

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