

# Building a modern tech stack with NetSuite

How to optimize operations for long-term scalability

# Presented by



**Derek Hitchman**

PARTNER, NETSUITE PRACTICE LEAD

- 10+ Year NetSuite Experience
- NetSuite Practice Leader
- Previously Founded SCS Cloud now part of CrossCountry Consulting

✉ [dhitchman@crosscountry-consulting.com](mailto:dhitchman@crosscountry-consulting.com)



- 100+ NetSuite Resources
- 2024 Solution Provider of the Year
- 1,000+ Employees
- Technology practice covering Salesforce, Coupa, OneStream and more
- Accounting Advisory & Risk Teams

## Agenda

# Building a modern tech stack with NetSuite

State of the Suite

Core NetSuite vs SuiteApps vs External

My Tech Stack – Build vs Buy

AI & NetSuite



# State of the Suite

ERP & NetSuite Landscape

# State of the Suite

## ERP & NetSuite Landscape

### 1998 > Now

- Most Widely Used Mid-Market ERP
- Trusted for Scaling & Public Companies
- Deeply Integrated with Other Platforms
- Wide Network of Partner Apps
- Expanding Consulting & Support Base



### Now + 25 Years

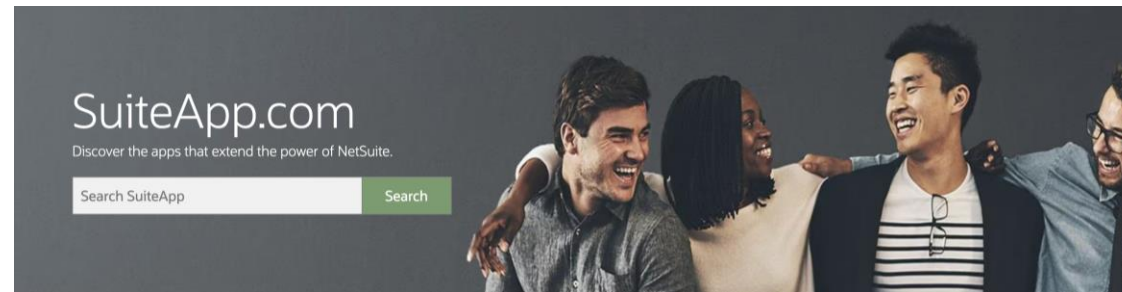
- Foundational Strength and Growth
- Changing Landscape of Tech + AI
- Automation and Value of Enterprise Systems
- System of Record / Source of Truth
- New Challengers & Innovation



# SuiteApps

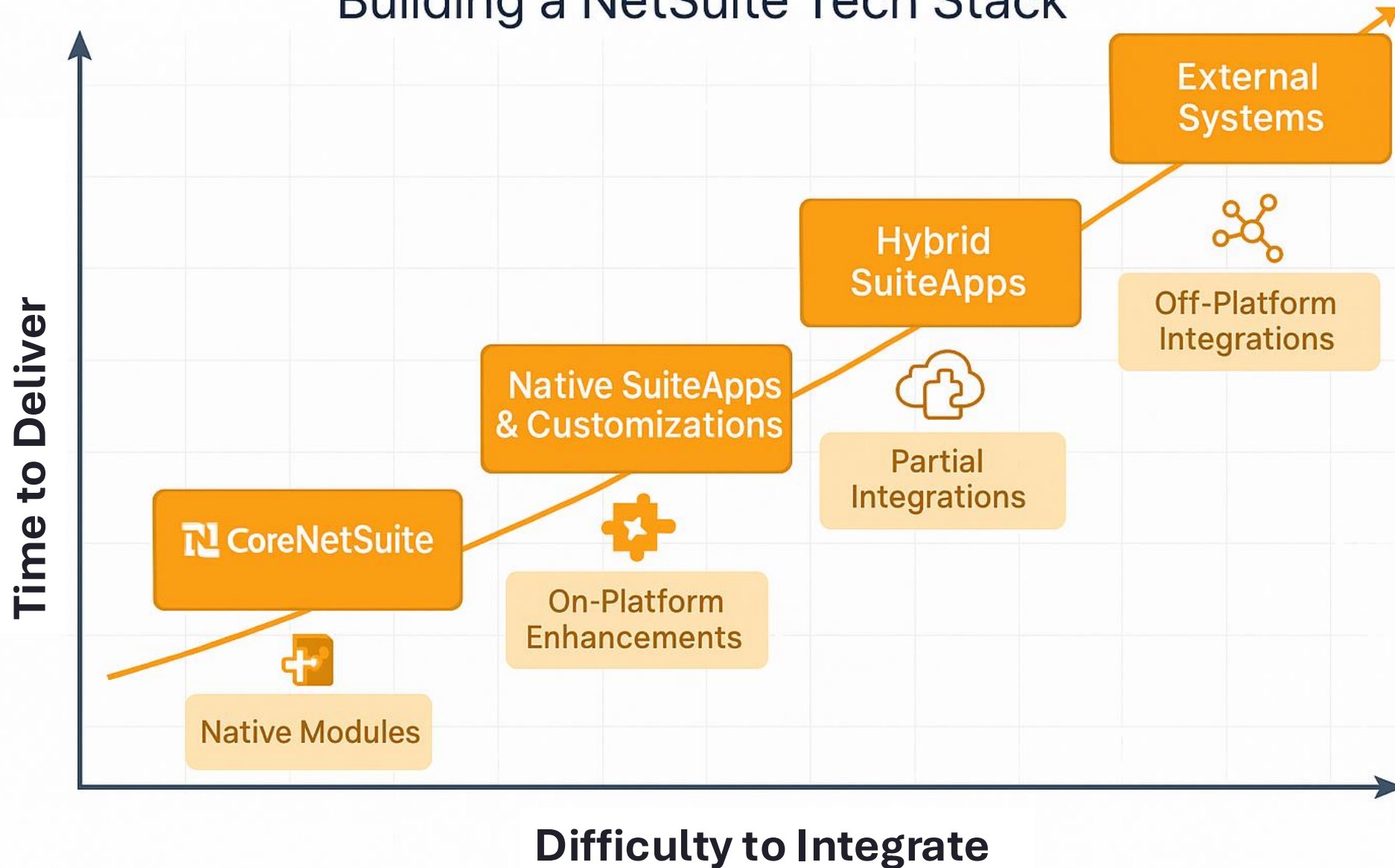
**Over 500+ SuiteApps**

Average NetSuite Mid-Size Account has 6+ SuiteApps

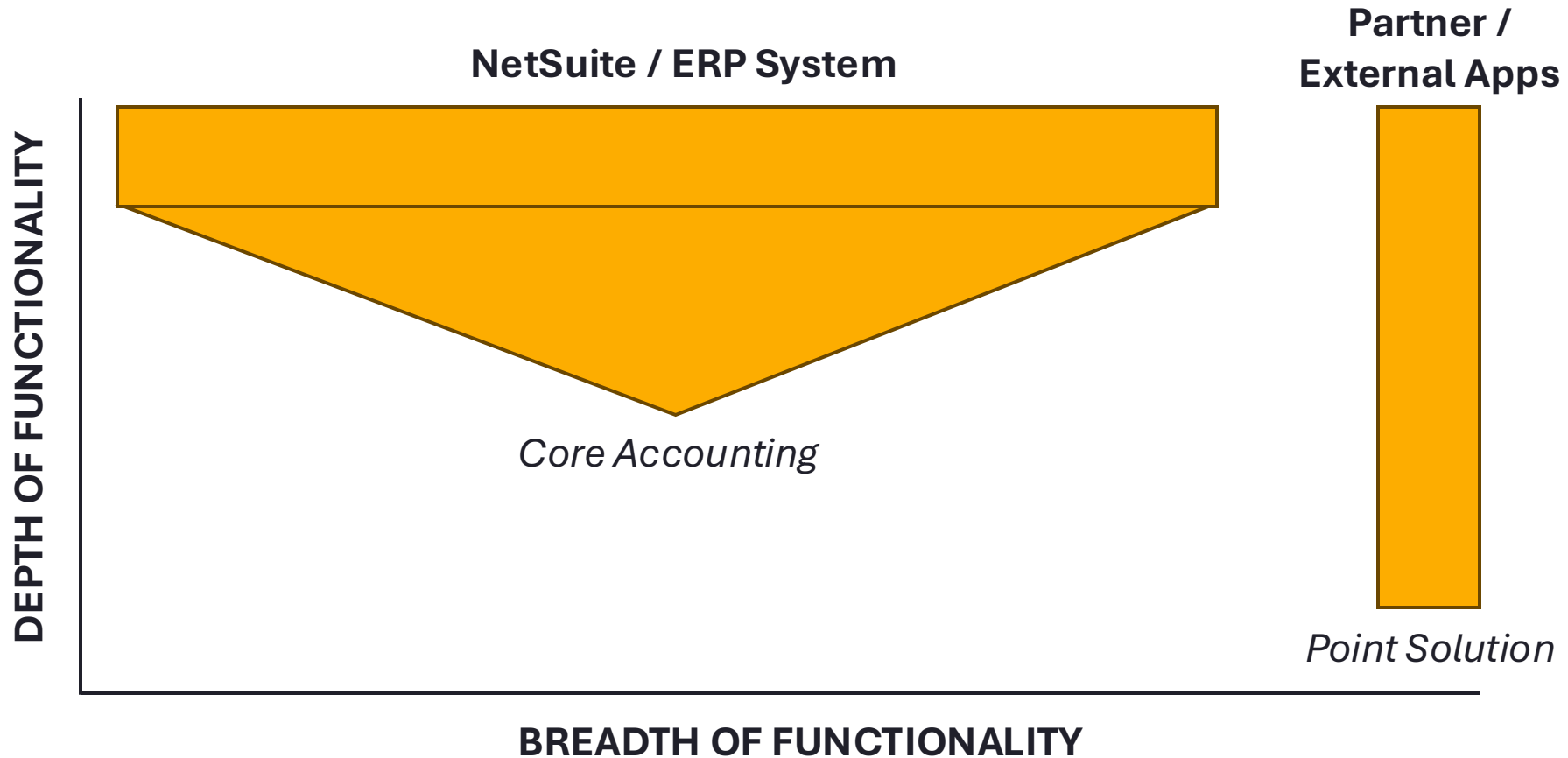


# Integration Complexity vs. Time to Deliver:

## Building a NetSuite Tech Stack



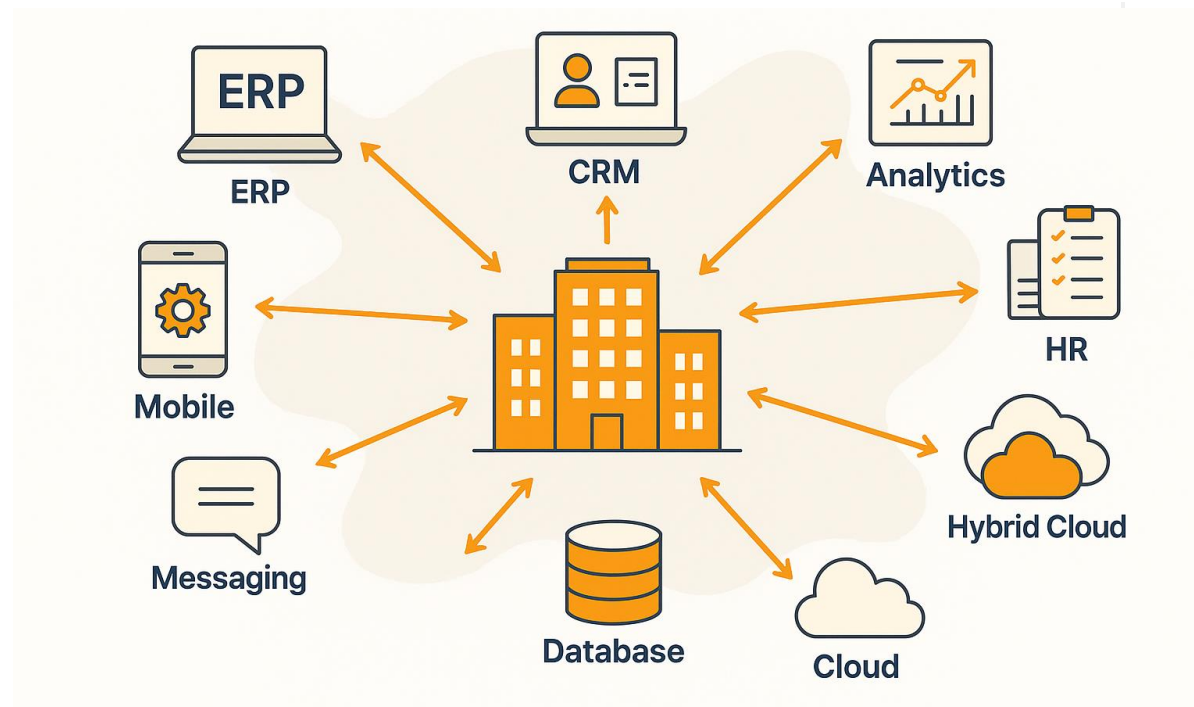
# Functionality: ERPs vs Partners





# External Systems & Other Apps

SaaS & Software Tool Expansion

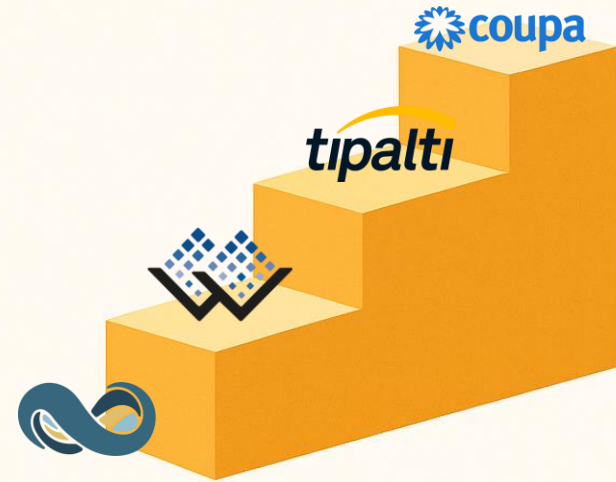


## Benefits and Risks of External Systems

- Best in class tools
- Expanded technology footprint
- Compliance & hacking risks

# Example: AP Automation Tools

- **Core NetSuite:** Bill Scanning Module
- **Native SuiteApp:** Squareworks
- **Hybrid SuiteApp:** Tipalti
- **External System:** Coupa



# Build vs Buy

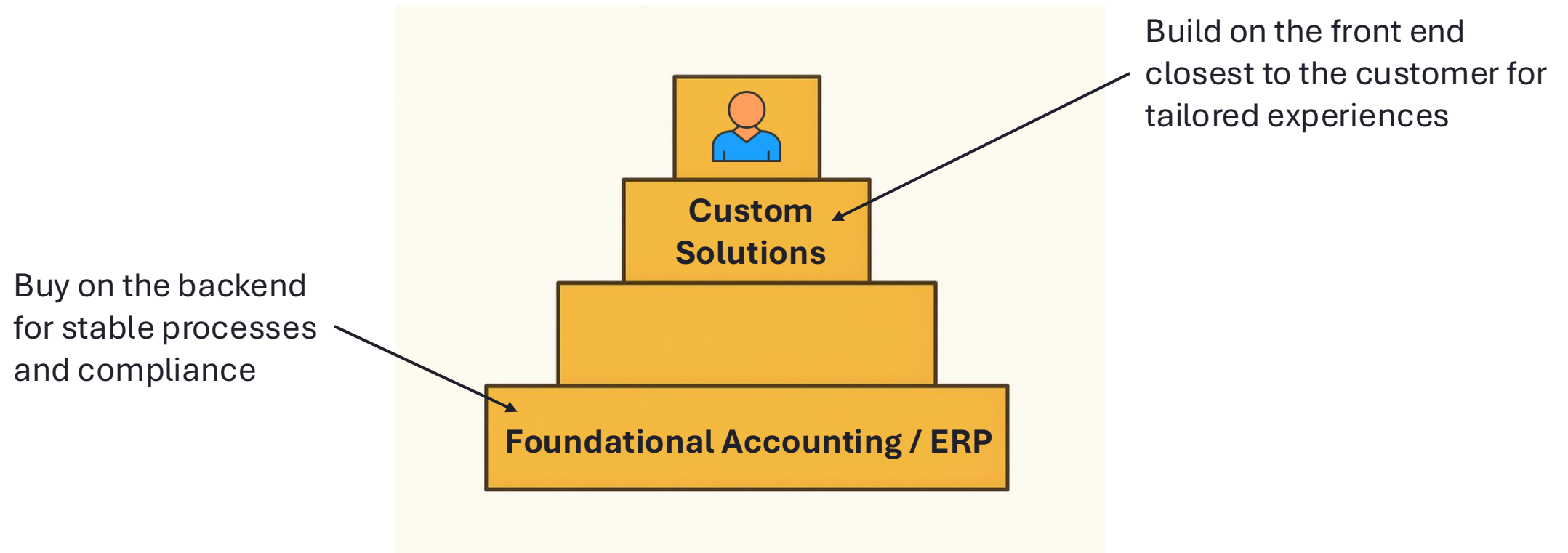
## WHEN TO BUILD

- Internal or consulting team deeply understands requirements
- Stable internal or consulting resources to support solution and optimizations
- Time and energy present to focus on solution architecture and testing
- “Buy” vendor is a risk of not supporting tool in near future due to size/scale

## WHEN TO BUY

- Solution is 80%+ fit and either app or processes can be adapted for 100% fit
- Direct impact to accounting or financials creates increased risk for DIY builds
- Vendor support readily available for business critical processes
- Resources in-house are insufficient or have risk of turnover

# Build vs Buy



# Buy: Risks vs Rewards

## BUY – RISKS

- Failed implementations of add-ons can waste a huge amount of time and money
- SaaS vendors are often acquired creating confusion
- Often 80% isn't good enough, the solution needs to work 100%
- System slow-down or integration issues

## BUY – REWARDS

- Vendor expertise baked into the solution
- App often continues to improve with releases and updates
- Vendor maintains continuity of support
- Proper solutions can scale with the business whereas manual workarounds do not



# Build: Consulting Team Selection

- A consulting team is only as good as the people assigned to your project
- A well-rounded team of consultants can be more effective than a single expert, especially for larger engagements
- Quality beats quantity every time



# Consulting Firm Selection

## Fast

- Focused Attention
- Dedicated Team
- Sense of Urgency

## Good

- Skilled Resources
- Proper Architecture
- Project Management

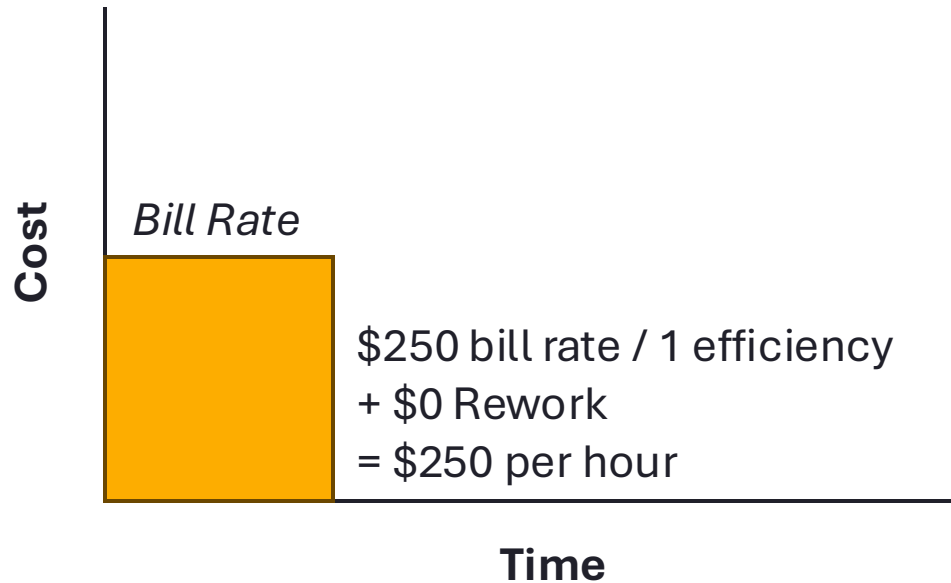
## Cheap

- Bill Rate / Project Fees
- + Rework
- + Loss of Time

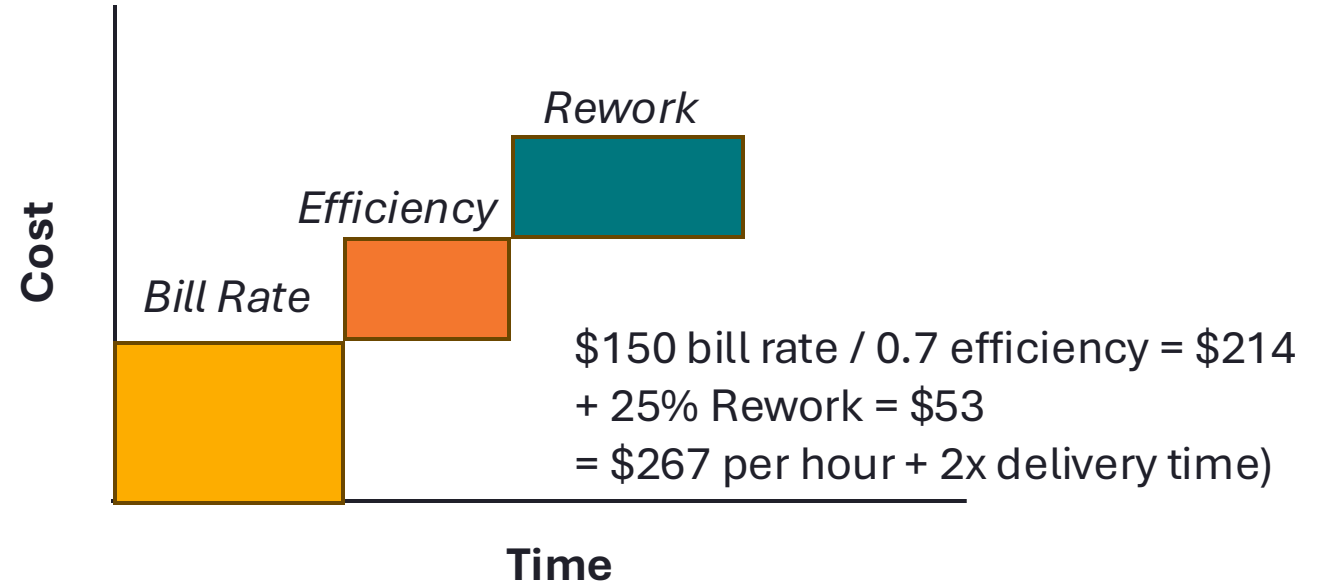
# Consulting Firm Selection

## The True Cost of Unskilled or Ineffective Consulting Firms

Efficient Team



Inefficient Team



Consultant Efficiency Formula: (Bill Rate / Efficiency) + Rework

# Build Issues

## The SuperHero Problem



- Effective delivery but single point of failure
- Often too technically focused and risk of over-build
- Eventually the SuperHero flies off



# NetSuite Dream Team



## Business Analyst

- Business process expertise
- Access to end users and business team
- Understanding of People, Process and Technology Impacts



## Solution Architect

- NetSuite and adjacent system expertise
- Experience with building similar solutions in NetSuite
- Familiar with business processes and systems/tools



## Functional Lead

- Drive configuration, updates, documentation and walkthroughs
  - Lead testing efforts and facilitate issue resolution
- Perform deployment and support



## Technical Lead

- Design and develop NetSuite scripted solutions
- Build integrations
- Deploy scripting and resolve any code issues
- Document and save code



# Build – Checklist

## Questions to Ask Before Building

### 1. Clear Requirements?

- Needed... or Just wanted?
- Who does it impact?
- What problem is trying to be solved?
- What are the benefits and risks?

### 2. Clear Design Options?

- Is it simple enough?
- Is there really ROI on building something?
- Does it meet all requirements?
- Does it create other problems?

### 3. Accurate Effort Estimation?

- Is the team qualified to build?
- Do they understand the design?
- Is the effort and timeline estimated properly?
- Is the cost fixed or variable?

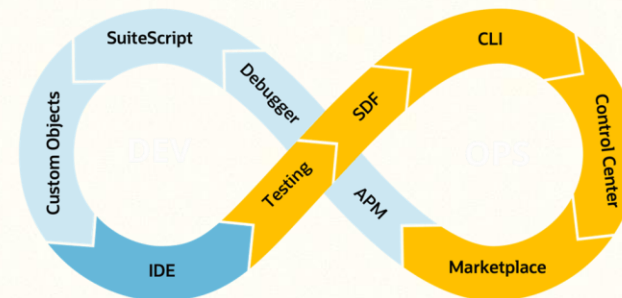
### 4. Ability to Roll Out & Support?

- Change Management Required?
- Process Changes?
- Training?
- Who will support after launch?

# Building an Internal Process

- Design Process
- Internal Tools & Task Tracking
- Sandbox Environments
- Change Approval Board (CAB) or Similar
- User Acceptance Testing (UAT) Process
- Software Development Lifecycle (SDLC)

## Internal Development Process for NetSuite Customizations



# Q&A

Netgain **Accounting**  
**SUMMIT**25

# AI & NetSuite

Today and the Future







# Foundational AI in OCI & NetSuite

## Applications



Global ERP



CRM



HCM



PSA



Commerce



Analytics  
& Reporting

SuiteApp.com

Partners & Apps

## Platform



AI Assistants



AI Advisors



Customization



Process  
Automation



App Development



Integration



App Distribution

## AI Services

### GENERATIVE AI SERVICES



Summarize,  
Search, Classify



Creative Insights



Foundation  
Models



Auto SQL

### OTHER AI SERVICES



Vision



Speech



Anomaly  
Detection



Forecasting



Document  
Understanding



Language & DA



OCI  
Data Science

## Infrastructure



Oracle Cloud Infrastructure



Autonomous Database



30 Global Data Centers



# NetSuite Platform

## Initial Approach to AI Tools



### Assist

- Handle repetitive tasks based on business rules
- Increase accuracy, speed and employee productivity, reduce errors



### Advise

- Identify trends, make predictions answer question and offer recommendations
- Deliver unique insights to help drive decision-making

### NetSuite Assistants

NetSuite Bill Capture  
NetSuite Text Enhance  
NetSuite Prompt Studio  
NetSuite Financial Exception Management  
NetSuite SuiteAnalytics Assistant  
NetSuite SuiteScript GenAI API  
Oracle Code Assist  
SuiteAnswers Virtual Support Assistant  
OCI Anomaly Detection

### NetSuite Advisors

NetSuite EPM  
NetSuite Planning and Budgeting  
NetSuite Narrative Reporting  
NetSuite Analytics Warehouse  
NetSuite Supply Chain Control Tower  
NetSuite Intelligent Item Recommendation

# AI Automation & Insights

## Now

- NetSuite Assist & Advise Tools
- Narrative AI Reporting Tools
- Chatbots Galore

## Soon

- Custom Built AI Solutions
- Partners Incorporating AI Into SuiteApps
- Improved Insights into Data & Transactions

## Future

- AI Agents & Agentic Workflows
- Automated Data Entry and Process Automation
- Dramatic Increase in Efficiency

# Oracle Fusion AI Agent Studio

The screenshot displays the Oracle Fusion AI Agent Studio interface. At the top, there is a search bar labeled "Ask Oracle" and filters for "Type", "Family", and "Product". Below these, several AI agents are listed as cards:

- Procurement Policy Advisor** (Agent - SCM - Procurement): Provides seamless access to procurement policies enabling employees to ask questions while...
- Sales Quote Generation** (Team - CX - Sales): Orchestrates the recommendation of two to three different options for a given renewal quote. Helps...
- Career Planning Guide** (Team - HCM - Career Development): Helps employees create actionable career progression plans. For example, the agent can suggest...
- Insights Advisor** (Agent - ERP - Accounts Payable): Monitors for user specified business criteria and conditions and generates payment insights...
- Payment Execution Analyst** (Agent - ERP - Accounts Payable): Assists Analysts payment...

Each card includes a "Use Template" button and a "Learn More" link. On the right, a "Create AI Agents" section states: "AI Agents can use a variety of tools, topics and 3rd party integrations to work on the use cases you define." with "Create Agent" and "Learn More" buttons.

An inset window provides a detailed view of the **Maintenance Repair Assessor** agent. It shows a hierarchical structure with the following components:

- Maintenance Repair Assessor** (Agent - HCM - Maintenance): Assists Maintenance Supervisors in repair assessments and provides a summary of...
  - Topics (0)**
  - Maintenance Work Order Manager** (Agent - HCM - Maintenance): Manages work orders by retrieving information on current work orders and...
    - Tools (4)**
    - Topics (0)**
  - Maintenance Advisor** (Agent - HCM - Maintenance): Reports problem and provides suggested repair options. Analyzes images of...
    - Tools (2)**
    - Topics (1)**
  - Repair Costs Advisor** (Agent - HCM - Maintenance): Calculates the estimated work order costs for any given repair.
    - Tools (3)**
    - Topics (0)**
  - Maintenance Summary** (Agent - HCM - Maintenance): Creates a concise summary by synthesizing data for the maintenance...
    - Tools (0)**
    - Topics (1)**

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- NetSuite and adjacent system expertise
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## Agent – Optimize

- Implements configure and code changes
- Leading testing and issue resolution
- Writes documentation and training content



## Agent – Support

- Supports existing users
- Makes data updates and fixes user errors
- Provides reporting and information on demand



# Q&A

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# Thank you