

NetSuite Support & Managed Services Guide: Winning Strategies, Solutions, and Partners

2024 State of the Industry: Redefining "Support" Takes Top Priority

It doesn't matter if you're in Hong Kong or Houston, building quantum computers or reselling Chevys, commuting to a Fortune 500 office or logging in to a Silicon Valley startup, success often boils down to one thing: your ability to adapt.

The extent to which you can quickly and effectively manage change, mitigate risks, and plan for the future is directly correlated to your support network. This is especially true when it comes to NetSuite, an incredibly powerful tool that possesses the power to make or break your business.

With the right strategies, powerful solutions, and the **best NetSuite partners** based on your unique needs, your business can reach unprecedented new heights. However, if you miss even one of those components, you could cause more harm than good.

It's widely known that NetSuite is a big

investment – in terms of not just money, but also the time, labor, and energy of your team – and it's critical that your investment pays off. We created this guide in hopes of helping you do exactly that.

Today, we share some of the most valuable insights we've learned from conducting hundreds of implementations that span continents, identify strategies that have helped clients generate billions, and share what we believe to be the future of NetSuite Support and Managed Services: Continued Success.

Whether your go-live date was five days ago or five years ago, whether you are struggling to manage your support needs internally or depending on external teams to get the job done, this guide is designed for you.

Should you need any assistance along the way, your friends at Techfino are happy to lend a hand.



Chapter 1:

Traditional Approaches to NetSuite Support: The Old Way of Doing Things

Historically, businesses have had limited options when it came to securing quality, ongoing support for NetSuite. Organizations could hire NetSuite directly, employ a vendor who offers support services, or attempt to manage their NetSuite instance in-house. Let's take a closer look at each of these options as well as the unique set of challenges that accompany them.

Paying NetSuite Directly for "Support Services"

NetSuite offers a plethora of support options and training, many of which are housed under the umbrella of "Support Services". However, the options are so numerous and varied that it can be difficult for customers to determine: a) what NetSuite is selling, b) what support features they actually need, and, importantly, c) how much it will cost.

"Basic Support"

As its name suggests, this is the most basic form of support offered by NetSuite and it's included with all plans. While there is a 24-hour helpline, they only assist with what NetSuite classifies as "critical issues." Users are also granted access to online knowledge libraries and support communities.

"Premium Support"

The "Premium Support" plan is very similar to the "Basic Support" option, with a few key upgrades. Notably, it's the minimum tier you must purchase to be notified in advance of new releases, receive weekend support (an absolute necessity in today's on-demand world), or get any level of assistance with NetSuite usage and configuration. Support over the phone is limited to five named users.

"Advanced Customer Support" (ACS)

"Advanced Customer Support," commonly referred to as "ACS," is the highest level of support offered by NetSuite. This naturally makes it the most expensive. What does the increase in **NetSuite pricing** get

you? The key differentiator of this subscription-based service is that customers get access to ACS Playbooks designed to guide organizations through complex growth stages and challenges. Support reps are assigned ad-hoc rather than being familiar with your needs, and only support NetSuite - so they typically require a dedicated liaison within your team for anything relating to boundary applications the client is using.

NetSuite Learning Cloud Support (LCS)

NetSuite Learning Cloud Support (LCS) is focused on educational resources and training and includes a range of learning materials, such as self-paced online courses, webinars, and in-person training sessions. However, this upsell is largely self-driven.

Misc: Suite Answers and Support Community

In addition to the structured support plans, NetSuite offers several additional resources. "SuiteAnswers" is an extensive, self-service knowledge base where users can find answers to common questions and learn best practices. The NetSuite Support

Community is another valuable resource, offering a platform for users to share insights, ask questions, and learn from each other's experiences. Although these resources are beneficial for general queries and continuous learning, they are insufficient

for complex or specific issues and are in no way a replacement for personalized support for unique or urgent problems.

Managing NetSuite Support In-House

One of the most demanding ways to manage your NetSuite Support is to adopt a pure "in-house" model. This means your business is solely responsible for managing any and all support-related services.

This approach can quickly become overwhelming, and it opens your organization up to risks that might not be immediately clear. Here are a few examples of the challenges associated with the in-house management style.

Challenges to managing NetSuite Identifying NetSuite Implementation and Management Problems e Support internally

Limited bandwidth

There are only so many hours in the day. When the unexpected happens, are you certain you'll have the bandwidth required to solve the problem — let alone be proactive about the adoption of new features and future-proofing your tech stack?

High Cost

If you're lucky enough to find a skilled NetSuite admin to join your team, you can expect to pay generously for them - a cost that is likely to increase as your clients' needs continue to expand.

Record turnover

The tech sector, specifically IT, is facing record turnover. Do you have a contingency plan in place if you were to lose a key NetSuite/IT administrator?

Complexity of NetSuite Environment

NetSuite is a complex and multifaceted tool. Managing it requires deep expertise in various modules and their integrations. Without a team of

specialists, it's challenging to fully leverage all of NetSuite's capabilities and ensure smooth operation.

Continuous Training and Skill Upgradation

NetSuite continually evolves with new updates and features. Keeping an in-house team consistently trained and up-to-date with these changes is resource-intensive and may detract from focusing on core business functions.

Scalability Issues

As your business grows, so do your NetSuite needs. An in-house team may struggle to scale efficiently, requiring continual support from expert partners, as well as meeting the costs that come with them. This leads to bottlenecks and delays in addressing crucial system needs or taking advantage of new functionalities.

Hiring a third party to manage your NetSuite Support services

For many organizations, it makes sense to hire a third party to provide some or all of their ongoing NetSuite support needs. However, it's important to remember that not all partners are created equal.

The quality, competency, and cost can vary greatly depending on the solution provider you select. The most important thing to remember is that you **should hire a true NetSuite Partner** – not just another vendor you have to manage day in and day out.

This is one of the most common problems we encounter when rescuing businesses from failed implementations. Here are a few other missteps you should avoid:

Jack-of-All-Trades IT Firms

These firms might offer a wide range of services but lack in-depth expertise in NetSuite. Their generalized approach can result in less effective NetSuite optimization and support compared to dedicated NetSuite partners.

Temporary NetSuite Administrators

Hiring an administrator on a freelance basis means you're unsure of their true level of experience managing NetSuite, let alone their familiarity level with your industry. They might not have the depth

of knowledge required to manage complex NetSuite environments efficiently – regardless of how difficult they were to source, or the inevitably high rate they will invoice you.

Freelance NetSuite Developers

Freelancers may have diverse expertise, but they often juggle multiple clients, which can lead to divided attention and inconsistent availability. This juggling act can affect their ability to deeply understand and prioritize your specific project needs

Is it time to find a new NetSuite Support Partner?

Given the many challenges involved in finding a quality NetSuite Partner, organizations who are working with third-party support services might find that their external team isn't the right fit for their needs.

If you're unsure if it's time for your organization to make the switch, be on the lookout for any of the following warning signs.

Identifying NetSuite Implementation and Management Problems

NetSuite integration problems

Did your **NetSuite integration face unexpected difficulties**? This can quickly lead to unexpected and substantive costs, as well as far-reaching operational inefficiencies.

NetSuite project delays and overruns

Consistent delays and budget overruns in NetSuite-related projects, indicating poor planning or lack of expertise.

Failed NetSuite Implementation Setups

Incomplete or faulty NetSuite implementations can hinder business processes and derail your short-term and long-term goals.

On-going NetSuite Performance Issues

Persistent performance issues with NetSuite are sure to impact your daily business operations and only get worse unless they are fully addressed.

Lack of Responsiveness from NetSuite Consultancy

Slow or inadequate responses to queries and concerns indicate a lack of commitment or

understanding of your business needs — or it could be that the consultancy, agency, or freelancer is overbooked. Either way, it's completely unacceptable and could cost your business a fortune.

Lack of Quality Change Management

Underpinning many of the above issues, poor change management practices don't only have the potential to ruin your Netsuite implementation and management outcomes, but inevitably lead to failed audits and expensive re-work to rectify the problems they cause.

Chapter 2:

What Makes Managed Services The Best NetSuite Support Option?

Given these collective challenges, we think the optimal form of ongoing support lies in what's referred to as "managed services." Managed services, in the context of NetSuite support, offer a more comprehensive and integrated approach, benefitting from maximum agility and a rich breadth of knowledge when compared with the alternatives like in-house management, freelance consultants, or generic IT support.

Managed Service providers specialize in NetSuite expertise and should possess a deep understanding of the platform's intricacies and how they align with your specific business processes. They offer proactive maintenance, regular updates, and optimization tailored to your business needs, ensuring NetSuite functions seamlessly within your organization's ecosystem. This approach not only addresses immediate technical issues but also focuses on strategic planning for future growth and efficiency, providing a holistic solution for NetSuite management.

Let's take a closer look at some of the common features included in this approach.

Solutions typically available with NetSuite managed services approach

Strategic Advisory Services & Solution Architecture

This can involve developing comprehensive **NetSuite solution architectures**, such as an IT Roadmap with future plans for expansion, or System Landscape and Architecture diagrams to convey the systems and infrastructure that support your business objectives visually. Not to mention consulting on best practices, and developing proven system scalability.

NetSuite Customization and Optimization:

Managed service providers typically work closely with businesses to **customize and optimize NetSuite** to fit their unique processes and requirements. This can include developing custom scripts, workflows, and forms to enhance functionality.

NetSuite Training & Knowledge Transfer:

To ensure that users can fully leverage NetSuite's capabilities, a high-quality managed service provider will often include comprehensive training sessions and support in order to empower users to utilize the system effectively.

NetSuite Integration Support

As businesses grow, they often need to integrate other systems with NetSuite. Managed service providers assist with **NetSuite integrations**, ensuring seamless connectivity and data flow between systems. This can be custom integrations developed in the application layer, external third party integrations, or iPaaS Integrations - which standardize everything in-house using a framework to ensure centralized management and maintenance. This approach also allows for easier support and

maintenance for integration from one system to all others within the organization.

Performance Monitoring

Regular monitoring of the system's performance is conducted to identify and address any potential issues proactively. This includes optimizing system configurations to improve speed and efficiency. The right experts must be in place to execute this routinely and with precision - In depth knowledge of relevant methods and processes like Saved Searches are essential, to mitigate potentially huge impacts to mission critical processes that don't meet NetSuite's strict governance limitations.

Updates and Upgrades

NetSuite is continuously evolving, with regular updates and new features. Managed services include managing these updates, ensuring that businesses can take advantage of the latest functionalities without disrupting their operations.

Data Security and Backup

Ensuring the security and integrity of data within NetSuite is critical. Managed service providers offer guidance on security best practices and segregation of duties, as well as data integrity by ensuring validations and regular reviews of master data accuracy.

Compliance Management

For businesses in regulated industries, maintaining compliance is crucial. Managed services can help ensure that NetSuite usage complies with industry standards and regulations, like SOX Compliance and Data Retention policies.

Determining if NetSuite Managed Services is the Best Support Option for Your Company

When evaluating where Managed Services is right for your company, consider asking yourself the following questions. If you answer yes to any of the following, you should begin exploring a managed services approach.

1. Do you need a more hands-on support model than that offered by NetSuite Premium Support, ACS or your in-house team?
2. Do you need a NetSuite Administrator who fully understands your industry?
3. Are you missing a CIO and an IT Manager that fully understands NetSuite from an architecture perspective?
4. Do you have ongoing NetSuite performance challenges requiring a solution?
5. Do you have a complex NetSuite environment with multiple vendor arrangements?
6. Do you want a single, "go to" Partner to manage it all that extends your team and uses your internal tools and 3rd party apps?
7. Does your business require 24/7 Phone/Technical Support?
8. Do you have the internal manpower to optimize the platform fully?
9. Are you feeling unsatisfied with the level of support you are receiving from your current partner? Whether that be responsiveness, turn-around times, lack of proactive advising, vertical expertise, etc.
10. Is NetSuite trying to sell you Advanced Customer Support? Unsure if you should buy a Learning Pass? Are you constantly being pitched to upgrade or buy new modules?
11. Do you operate in any of the following industries?
 - Home Furnishings
 - Retail
 - Apparel, Fashion, Accessories
 - Non-Profit
 - Wholesale
 - Manufacturing
 - Software
 - Professional Services

Chapter 3:

Introducing ContinuedSuccess: The #1 NetSuite Support & Managed Services Solution

About ContinuedSuccess, Techfino's Latest Innovation

Five years ago, Techfino revolutionized the world of NetSuite Support by being the first partner to offer NetSuite Support as a Managed Service with 24/7 assistance – and we've never stopped innovating. Now, we're proud to be able to offer our industry-leading solution: ContinuedSuccess.

ContinuedSuccess is our proprietary, subscription-based Support service that serves as your one-stop-shop for all things NetSuite, including: IT strategy, managing your IT roadmap, support for all NetSuite modules, industry expertise, and contextual guidance. We aren't your typical vendor; we fully augment your existing team and help lead efforts with our dedicated techno-functional and vertical expertise.

You can rest easy knowing our NetSuite advocates will provide your leadership team with the highest quality advice and day-to-day operations. Our proactive involvement allows us to delve deeply, uncover essential details, and chart the most effective path forward. We're ready to undertake the heavy lifting when needed and guide you to your desired destination as quickly, efficiently, and cost-effectively as possible.

Key Benefits of ContinuedSuccess

Our unique approach to NetSuite Support and Managed Services is designed to help you make immediate decisions, implement change, enhance productivity, reduce costs, and put your organization on the path to continuous upward growth. **Additional Benefits of Our NetSuite Support Solutions:**

- Realize the investment in NetSuite almost immediately
- Gain Access to a dedicated team with deep industry vertical expertise
- Receive Best-in-Class, proactive, and ongoing consultation
- Benefit from around-the-clock optimization
- Obtain a cost-effective solution to support the IT, Finance, and Operation groups
- Single point of coordination for NS Service and Support
- Manage one contract for your maintenance, administration, sustaining, and enhancement needs
- Our consistent contextual team meets your needs, providing advice on the best solution usage and execution against that advice
- Get responsive results when you need them (no waiting for SOW's)
- Support for multi-vendor environment advice and structures
- Access a complete team of platform, solution, and development personnel at a fraction of the cost

Chapter 4:

ContinuedSuccess: Best NetSuite Support Features & Services

When you purchase ContinuedSuccess by Techfino, you get access to industry leading products, features, and support. Here are a few highlights of the services we include in each plan.

NetSuite Upgrade Support

New Release Notification

We actively monitor and inform you about upcoming upgrades, including the availability of the release preview environment. Our aim is to help you prepare efficiently for new NetSuite releases.

Impact Assessment

Our team conducts a thorough analysis of the release notes to identify potential areas of risk based on your account's unique configuration. We then guide you through the entire release process, ensuring a smooth transition.

Walk-thru Training of New Relevant Features

Our functional team provides detailed walkthroughs and training on new features and enhancements relevant to your business operations, ensuring you fully leverage the latest updates.

Test Planning & Execution

We develop a comprehensive test plan for each of your key business workflows. Our team then conducts thorough regression testing to ensure a seamless and stress-free experience post-upgrade.

Status Reporting

We provide weekly reports detailing hours used at the start of the month, unused hours banked from prior months, key activities, risks, and the status of cases opened, closed, and in-progress.

NetSuite Performance Benchmarking

We measure key performance indicators (KPIs) in your NetSuite account for subsequent review and analysis, helping you understand the impact of upgrades on your system's performance. While we leverage NetSuite Application Performance Monitoring tool to monitor scripts, workflows and integrations, it's also important to benchmark system performance for various pages loading to use later in accelerating the support resolution time in the event of a marked decrease in performance.

Day-to-Day System Administration

Our services include data imports, user provisioning, creating ad-hoc reports, and light customization.

Issue Mitigation

Our team efficiently manages and reports on all open cases/issues with NetSuite, including their resolution state and root cause analysis.

Planning

We meticulously plan for the support hours needed for new releases, roadmap planning, and managing open cases for the upcoming month.

Analysis

We highlight emerging trends, script errors, or areas of concern regarding system performance, ensuring proactive issue resolution.

NetSuite Training

On-demand, we develop and deliver role-based training modules, tailored to the specific needs of your team.

Boundary Application Support

Beyond NetSuite, we offer support for other third-party systems, including back-office integrated apps like Boomi, Celigo, Strongpoint, Blackline, SQL Server, Jira, Confluence, and others.

Three Levels of NetSuite Support

Continued success offers support levels that are right for every business, regardless of where they're at or where they're headed. For a more granular breakdown of product features and classifications, let's take a look at our three forms of support: NetSuite Admin Support, NetSuite Functional Support, and NetSuite Development Support.

NetSuite Admin Support	NetSuite Functional Support	NetSuite Development Support
Ongoing NetSuite administration	End User Support	Create New reports
Maintain secure access	Answer How To Questions	Create New dashboards
Data cleansing and upload	Provide solutions for business requirements	Create or manage automated processes with NetSuite SuiteFlows
Data administration & maintenance	Train new users	Enhance NetSuite functionality with scripting using NetSuite SuiteScripts
Help with optimizing the usage of NetSuite	Help in performing functional tasks and transactions	NetSuite Form Creation
Monitor usage & transactions	Help your IT team in resolving end user requests	NetSuite Integrations
Provide support for your IT team on technical issues	Help in running reports/ dashboards	Installation of Suite Bundle as required
Create new users, roles	Help with using best practices of NetSuite	Custom application development using SuiteCloud Developer Framework (SDF)
Create Saved searches	Monitor functional usage and transactions	Assistance with API integrations and third-party tools
General support, analytics	Year and month end processes	Installation and configuration of SuiteApps
Upgrades and testing	Customization and personalization assistance	NetSuite version migration support

NetSuite Admin Support	NetSuite Functional Support	NetSuite Development Support
Upgrades and testing	Customization and personalization assistance	NetSuite version migration support
Custom field and record management	Business process analysis and improvement recommendations	
Workflow administration	Assistance with managing subsidiaries and consolidations	
Period close assistance	NetSuite module and feature recommendations	
Performance monitoring and optimization		

Terms of Our Support Offerings

Curious how our support offerings work? Check out a few of the details below.

- Support Hours – 8 AM – 8 PM EST (Excluding US Holidays)
- 24/7 Support – Phone + Ticket Support
- Hours are allotted on the 1st of each month and can be prorated
- Unused hours can rollover to the next month
- SLA Response Time:
 - Critical Severity – 2 Business Hours
 - Significant Severity – 8 Business Hours
 - Minimal Severity – 2 Business Daysz
- Excludes defects present in external systems and/or NetSuite
- 5 Named Authorized Contacts – Create Cases (Phone/Online)
- Techfino needs at least one dedicated NetSuite Account login

Chapter 5:

The ContinuedSuccess Process: Laying the Foundation for Rapid, Reliable, and Continual Growth

The ContinuedSuccess model leverages a proactive support model that helps businesses scale, adapt, and grow; conquer new business opportunities; respond to competitive pressures; maximize your NetSuite investment; and serve as an extension of your existing team.

One of the most critical elements of this approach is to ensure that we lay down the foundation for success – and that begins with assembling a team built just for you.

Key Techfino Team Members Roles & Responsibilities

Customer Success Manager

- Primary escalation point for TF service concerns, billing, and contracts;
- Monthly billing management

Industry Lead

- Key resource for business advisory and optimizations, the Industry Lead will help assess your pain points and work with the Support Team to identify key areas that can be further optimized to maximize your use of NetSuite.

Technical Lead

- The Technical Lead works hand in hand with the Solution Architect on optimization projects. They will provide guidance to the developers and ensure that all developments meet the quality standards of Techfino.

Engagement Manager

- Main contact for ContinuedSuccess Support;
- Facilitator who executes communication plans;
- Monitors and manages project delivery and budget;
- Oversees the definition, documentation, and compliance of the client's Change Management Process;

Technical and Functional Support

- Dedicated Production Support Resources who will work on the resolution of production issues and will also work with the Solution Architect, Industry Lead or Technical Leads in identifying areas for optimization.

Key Roles and Responsibilities of Your Team

Executive Sponsor

- Key decision-maker and main point of contact for billing and contracts.

Project Lead

- Techfino engagement manager counterpart who oversees and ensures that key objectives and deliverables of the project are met.

NetSuite Administrator

- NetSuite system gatekeeper who manages environments and oversees access provisioning.

Business Process SMEs

- Key resources who can confirm the company's key business processes and can define specific use cases when necessary.

Highly-Structured Delivery Methodology

Techfino begins by swiftly gaining an understanding of your account and showcasing their comprehension to your team before initiating support. As a managed service provider, Techfino effectively extends your team, utilizing both NetSuite and external tools like Strongpoint, Jira and Bill.com. We also set a clear foundation for issue resolution in a production environment alongside ongoing optimization efforts. This involves outlining the entire process from issue creation to resolution, ensuring your team is fully aware of all the necessary steps in this procedure.

Addressing Change Management When Switching NetSuite Support Providers

Nothing can make or break your NetSuite Implementation plans quite like change management. That's why we've taken particular care to develop the best process in the industry. Here's what it entails

Change Management Cycle



Chapter 6:

Upgrading Your NetSuite Support and Maximizing Your Investment

If you'd like to upgrade your NetSuite Support and maximize your investment for years to come, we hope you consider working with Techfino, where you gain access to a true partner and not just another expense.

What Makes Techfino the Best NetSuite Support Partner In the Industry?

Since our founding more than a decade ago, we've been on a mission to foster a culture of innovation and excellence that inspires our team to dream big and deliver best-in-class enterprise solutions that help our clients streamline their operations, reduce costs, and drive growth.

We've taken that mission seriously – and it's led us to some amazing results:

- We were the first NetSuite Partner to offer NetSuite Support as a Managed Service & 24x7 Support
- Our proprietary Proactive Model helps ensure that we're planning for whatever the future throws our way, instead of being solely reactive
- We have conducted hundreds of world-wide implementations, including UK, Australia, Canada, Germany and China.
- We've studied your industry inside and out, and we've developed proven gameplans and strategies that enable us to optimize and **customize NetSuite** for your industry
- In addition to understanding your industry inside and out, our experts have extensive functional and technical NetSuite Support experience, ensuring you receive the best possible support.
- Every NetSuite consultant on our team is a handpicked, certified business consultant with a proven track-record that provides real consulting value.

Of course, what matters more than any of that is the fact that your success really is our top priority. We're dedicated to helping you achieve your business goals in the smartest, fastest, and most cost-effective way possible – and we will not stop until we've done so.

Get Started Now

The easiest way to get started is to **contact Techfino today**. If you'd like a little more information first, you can download our **ContinuedSuccess Whitepaper**. Either way, we hope you've found this guide helpful and hope that we can further assist you on your path to leveling up your NetSuite Support.

CONTINUED SUCCESS WHITEPAPER

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