ADVICE FROM THE FRONT LINES:

How One IT Services Firm Selected
a Platform for ERP, CRM and PSA

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Two years ago I was hired as the SVP of Operations at Golden Star Technologies, an IT Services and value-added reseller based out of Cerritos, California. My main responsibility from our leadership was clear: *find a way to make our business processes and the technology environment more modern.*

The Plan

My goal was to look at what systems and processes we had in place, evaluate a shortlist of solutions or combination of solutions, and settle on a platform that would last us for the next 30 years.

The first thing I did was look at what was in place and what areas needed business process improvements. Both project management and sales tracking were done in Microsoft Outlook and Excel, while our financial data was being managed in a legacy Microsoft Great Plains system.

When I started to look at core financial and operational areas in our business that needed to be addressed, I saw that we needed to find a solution for the following areas:

Business Process Improvement Needs

- Identity Management
- Document Storage
- CRM
- Quoting
- SOW and Proposal
- Pipeline and Forecast

- Order Processing
- Distributor Integration
- Warehousing
- Project Management
- Time Keeping
- Sales Commissions

- Taxation
- Accounting
- Catalog Management
- Financial Reporting

The Landscape

I knew that evaluating different ERP systems was the next logical step. It would be a good starting point to find a new financial backbone that also might be able to cover some of the other functional areas. After initial research, we came to our final four: FinancialForce, NetSuite, Microsoft Dynamics GP and Dynamics NAV.

I kept three priorities in mind when assessing the options:

1. Pick the best solution for each business area. Don't settle for good enough.

2. Simplify the solution by putting as much on one platform as possible.

3. Go with a secure business partner whose technology can carry us for the next 30 years.

CRM, Professional Services Automation (PSA) and Quoting were the three most important areas we needed to consider outside of the core ERP.

One of the first things we looked at was how many total systems were needed to fulfill these areas across the four different solutions.

With feasible integrations, our options looked like this:

	Solution 1	Solution 2	Solution 3	Solution 4
ERP	Microsoft Dynamics NAV	Microsoft Dynamics NAV	FINANCIAL FORCE·COM	ORACLE NetSuite
CRM	Microsoft Dynamics CRM	Microsoft Dynamics CRM	salesforce	ORACLE NetSuite
PSA	Autotask	Autotask	FINANCIAL FORCE·COM	ORACLE NetSuite
Quote	QuoteWerks	QuoteWerks	ConnectWise SELL	ConnectWise SELL

Final Solutions

> **With a cloud solution, it was going to be much easier and more cost effective to implement, manage and support the system on an ongoing basis.**

Seven Criteria

Next, my team and I looked at the four solutions across seven criteria:

- Usability – How intuitive is the system to learn and use?

- Platform – How extensible is the system natively and for integrations?

- Scalability – What would it look like to add users and subsidiaries?

- Manageability – How simple is the system to upkeep and administer?

- Flexibility – Will the system be able to change if my business model changes?

- Implementation – What team will I be working with or will it be a partner?

- Cost – How do they bill their product and what's the TCO?

Two Observations

We ended up grading each of the solutions across the criteria and made two significant observations.

The first was that the on-premise Microsoft systems performed poorly in nearly all of the categories when compared to the cloud-based NetSuite and FinancialForce.com systems especially in "usability," "flexibility" and "cost".

With a cloud solution, it was going to be much easier and more cost effective to implement, manage and support the system on an ongoing basis. We had serious concerns about traditional on-premise technology lasting 30 years as a solution for our business.

Our second observation was that FinancialForce's platform approach did not have the same functional reach as NetSuite's ERP. Lucky for us, NetSuite's CRM functionality was exactly what we needed at a lower price point than Salesforce.com. We could have gone with the pre-built Salesforce.com/ NetSuite integration, but Salesforce.com was really too big a hammer for our business.

New Operating Environment

Our Decision

Ultimately, FinancialForce did not match NetSuite's breadth. We chose the NetSuite platform because we felt it would help us manage our financials, projects, sales and warehousing natively in one data source. Above are our initial business process needs along with the solutions that we chose to solve for them.

None of it would have mattered if my team had issues with the quality. But we feel that we selected a best-of-breed solution for each of these business processes, and it just so happened that NetSuite was able to step up and be a leader in 10 out of 16.

After nine months of operating on this system, we've been more than satisfied. We also felt reassured after hearing news of the Oracle acquisition. Everything we've seen from Oracle is around more investment in the NetSuite platform and a commitment to the cloud—our two most important criteria for selecting NetSuite in the first place.

If you're an IT Services company and evaluating new systems, please don't hesitate to reach out to me:

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