thevestedgroup

INVESTED INTELLIGENCE | NETSUITE ADVISORY

CALIBRATE

A structured review of your NetSuite environment — checking whether your configuration actually supports how you run the business, where it has drifted from best practice, and where processes have quietly broken down.

THE OFFERING

Unlike a manual audit that samples a handful of processes over several weeks, CALIBRATE reviews your full NetSuite footprint — records, roles, workflows, saved searches, customizations, and transaction history — to deliver a complete, evidence-based picture, fast.

- Alignment between your NetSuite configuration and the KPIs you use to run the business
- Identification of deviations from NetSuite best practices
- Pinpointing of broken or inefficient business processes, including work still being done outside NetSuite in spreadsheets, email, or disconnected tools
- Assessment of whether your environment is configured to support where your business is headed, not just where it has been
- A segregation-of-duties review of your NetSuite roles

USE CASES

USE CASE 1

Post-Acquisition Configuration Drift

Situation

A multi-entity company grew through acquisition. Each new subsidiary was onboarded onto NetSuite under time pressure, leaving behind inconsistent roles, duplicated saved searches, and workflows that no longer matched how the combined business actually operates.

What CALIBRATE Does

CALIBRATE inventories every role, workflow, and customization across entities, maps them against current business processes, and flags where configuration has diverged from best practice or from other entities.

Outcome

A single, prioritized roadmap to standardize roles and workflows across entities, closing the gap between disparate configurations and unifying financial and operational reporting.

USE CASE 2

Manual Workarounds & Shadow Spreadsheets

Situation

A finance team relies on NetSuite for transactions but has quietly moved planning, reconciliations, and approvals into spreadsheets and email because the system was never configured to support those processes.

What CALIBRATE Does

CALIBRATE identifies exactly which processes have migrated outside NetSuite, why they moved — missing workflow, unused module, restrictive role, absent saved search — and what it would take to bring them back in-system.

Outcome

A clear, effort-vs-impact ranked list of which workarounds to eliminate first, reducing manual re-keying and the reconciliation risk that comes with off-system data.

FROM CALIBRATE FINDINGS TO RESULTS DELIVERED

Business Process	KPI Impacted	Before CALIBRATE	After CALIBRATE
Month-End Close	Days to close the books	10–15 days	**5–8 days**
Role Administration	Segregation-of-duties exceptions	12–20 conflicts	**0–3 conflicts**
Reporting	% of core reports built as reusable saved searches	40–50%	**85%+**
Process Coverage	% of key processes running natively in NetSuite	60–70%	**90%+**
User Onboarding	Time to provision a new-hire role	3–5 days	**< 1 day**

Ranges reflect typical mid-market NetSuite environments assessed during discovery; your findings report will include figures specific to your environment.

WHAT YOU GET

- A discovery session to align on your business footprint and goals
- A full-environment review of records, roles, workflows, saved searches, customizations, and transaction history
- A prioritized findings report ranked by business impact and effort to resolve
- A roadmap of what to fix first, and why, not just a list of problems

Ready to calibrate your NetSuite environment?

Schedule a discovery session with our advisory team.

Email **jlang@thevested.com**