THE VESTED GROUP
HEALTH ASSESSMENT

APPROACH AND DELIVERABLES

- Intro Call to Develop Agenda to Include Focus Areas
- Onsite/Remote Process Reviews with The Vested Group team to include a Solution Architect, Functional Consultant, and/or Project Manager Roles depending upon assessment scope
- Strategic Approach to System Improvements
  o Review and Discuss Company Goals and Growth Plans
  o Review Processes and Use of NetSuite
  o Identify Inefficiencies and Training Opportunities
  o Focus on leveraging NetSuite functionality
  o Provide recommendations for add-on solutions to fill gaps in functionality if needed
- Findings and Recommendations Review Meeting Scheduled Within 2 Weeks of Process Review
  o Review and Discuss Findings and Recommendations Report
  o Identify Quick Wins
  o Discuss Project Priorities
  o Provide Estimates and Timelines

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HEALTH ASSESSMENT

When NetSuite isn't functioning to the best of its ability, having another set of eyes can be extremely beneficial. See how The Vested Group's NetSuite Health Assessment helped out Quality Sitework Materials:

CHALLENGES THEY WERE FACING:

After having a rocky implementation in 2018, Quality Sitework Materials began gradually moving their daily processes into NetSuite. After realizing they were still not operating at maximum efficiency, they began making small tweaks on their own throughout 2019.

Realizing they could still use some help with visibility in determining the best path forward, they reached out to The Vested Group, resulting in a NetSuite Health Assessment.

WHAT RESULTS DID THE HEALTH ASSESSMENT PROVIDE?

Being a small company, they were able to include the whole team in the Health Assessment, which resulted in better communication and buy-in across the board. When issues arose, The Vested Group team was able to guide the QSM team with direct, hands-on, step-by-step changes, resulting in immediate results.

Involving the whole team on the Health Assessment project allowed QSM to change their processes and procedures to better fit how NetSuite could work with their automation (automated A/R Reports to customers, automated Follow-Up Reminders, improved Dashboards, automated Backlog Reporting, etc…).