



CPAs & BUSINESS ADVISORS

CRM TO NETSUITE

Quote to Cash made simple

WHO WE ARE

- Top 20 tax and accounting
- 100 year anniversary
- 2000+ employees across the US
- Large focus on consulting – specifically around technology
- Joining forces with TrueCloud May 1

ORACLE®
NETSUITE

5 STAR AWARD
★★★★★
2013 – 2018

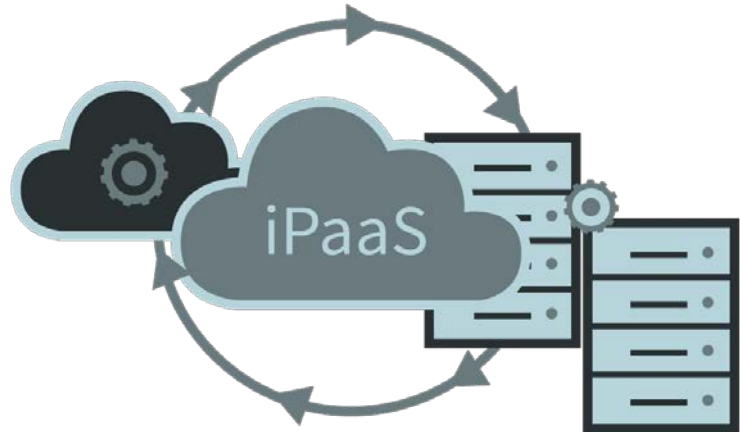


We are consultants first,
developers second.



INTEGRATIONS

PICK YOUR PATH



NO RIGHT OR WRONG ANSWER



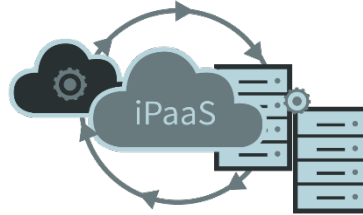
Custom Development

Pros

- Minimal recurring fees
- Unlimited flexibility
- Your support process

Cons

- Higher upfront cost
- Longer time to market
- Not a maintained solution
- Developer required for updates



Integration Platform

Pros

- Incredible flexibility
- Lower upfront development cost
- Quicker time to market
- Better agility
- Your support process

Cons

- Highest recurring fees
- Not a maintained solution



Turnkey Solution

Pros

- Completely maintained solution
- Fastest go to market time

Cons

- Recurring fees
- No flexibility
- Support is no longer in your hands



CASE STUDY

RED SKY SOLUTIONS

- Cyber security firm based in Draper, UT
- Massive growth
- Constantly changing environment
- Someone designated to own maintenance going forward

Hear their Story



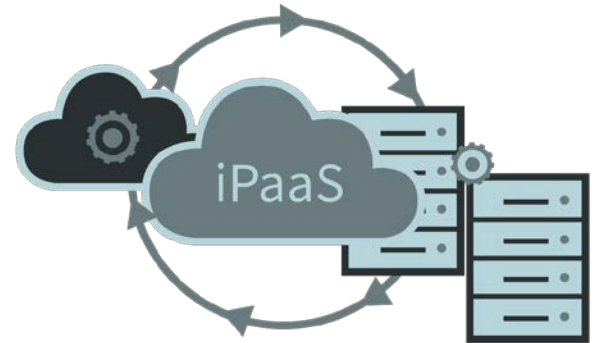
RED SKY SOLUTIONS

Challenges

- Agility
- Maintenance
- Total Cost of Ownership

Solution

- Dell Boomi, an admin configurable iPaaS solution



BENEFITS GAINED

- More robust and scalable solution
- Lower initial development cost
- Faster speed to market
- Admin maintainable
- Modifications happen on their own timeline
- Reduced total cost of ownership
- One platform to house all their integration logic



TIPS FROM THE PROS

WE'RE REALLY TALKING ABOUT PROCESS

Integrations are incredibly dynamic and complex because they are a direct reflection of your process. Your first move should be to get the appropriate stakeholders in a room to hash out the details.

DOCUMENTATION, DOCUMENTATION, DOCUMENTATION

You may think you have an understanding of what you want to accomplish, but until you are forced to put it all in writing, you likely don't understand what needs to happen at the level necessary for an integration to go smoothly.

IDENTIFY YOUR ADMIN

Someone needs to own the solution once it's built. Have them work closely with architect to ensure this person understands what has been built and how to maintain it

DON'T UNDERESTIMATE THE IMPORTANCE OF EXPERTS

You know NetSuite. Who knows the other system you are integrating with? Development and consulting time can be drastically reduced if you have a subject matter expert for your complimentary system. Don't have one? We can help.

QUESTIONS?

WWW.EIDEBAILLY.COM/TECHNOLOGY

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THANK YOU

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