ORACLE® NETSUITE
Alliance Partner

Migrating multiple global systems to cloud-based NetSuite for Educational Services company

A leading Educational Services firm sought a partner to bring several years of financial data from multiple systems around the world into NetSuite. They chose SquareWorks.

Staying competitive in the Educational Services industry is imperative, which is why organizations always look for more efficient ways to do business. A Virginia-based Educational Services company had a pressing need for a single ERP to bring all its data into a unified, cloud-based system. The goal was for this new system to serve as a central hub, making it convenient for employees and managers to access and share global data internally, with the board and among executives.

"SquareWorks had an intimate knowledge of the data. It seemed logical to outsource to them for the migration part of the project."

VP Finance, Educational Services Company

This company is one of the largest educational student travel companies in the United States. For more than 50 years, this firm has provided services around the world to more than 7 million individuals in over 100 countries. Acquisitions have been essential to their growth. Over the years, this company has operated using multiple data sources and various systems making data management difficult, fiscal period closes lengthy and reconciliations time consuming.

How SquareWorks Consulting Helped

In 2016, this firm made the decision to implement the NetSuite OneWorld ERP solution. After an internal assessment and an external search, they hired SquareWorks as its partner to perform all data migration activities related to the implementation. SquareWorks collaborated with 3 internal company teams and 2 external Consulting Firms. The complex migration occurred simultaneously with the implementation, and was required to be completed within the timeline established for the Go-Live of NetSuite. SquareWorks worked with this company and the 5 cross-functional teams to understand the legacy systems and new objectives, and helped guide the company in establishing the scope and milestones for the implementation project.

Project At-A-Glance

▶ Over 2 Million Transaction Lines Migrated
▶ More than 15,000 Vendor Records Migrated
▶ Data sources included: Epicor, GIS, and Excel
▶ Multiple currencies & 11 Subsidiaries
▶ Collaboration with 5 cross-functional teams

A minimum of 18 months of data needed to be brought into the new system prior to launch. This would enable the company to have sufficient historical data to prepare comparative financials in their new ERP system. SquareWorks advised them on how to achieve these goals and both companies established a clear and effective strategic plan.

Project Implementation & Results

SquareWorks' diverse range of expertise was instrumental in providing value through the entire data migration process. SquareWorks led this company through a comprehensive data mapping exercise, which enabled all key stakeholders to validate all required information being captured in NetSuite.

"The experience of working with SquareWorks was always positive. They brought in expertise where it was needed...all the people were very strong and willing to work with us to meet our deadlines."

Accounting Manager, Educational Services Company

SquareWorks developed data extraction scripts, verifying the resulting files aligned with the data mapping and met NetSuite import requirements. Through multiple levels of review and providing validation templates to the various teams, SquareWorks was able to migrate complete and accurate data into a Test environment with minimal subsequent adjustments. When additional data requirements were identified, SquareWorks was able to effectively reset expectations and quickly make any necessary changes using the Project Management structure established at the beginning of the project.

SquareWorks managed the project to the established milestones and maintained systematic communication with stakeholders. Through frequent collaboration, the team addressed all issues which arose which ensured the project deadlines were achieved.

This company cut its monthly closing time in half since the launch of NetSuite, nearing their 10-day goal. After completing the Data Migration project, they now have full ability to pay vendors and perform comparative analytics via NetSuite saving them time and improving accuracy. Since the launch, the company has continued to add-on new systems and variables to expand the functionality of their NetSuite implementation.

For more information about SquareWorks' Advisory Services and how to establish a Project Roadmap for a successful execution of an ERP project, please visit: http://www.SquareWorks.com/ Services/Advisory/