



Financial Services



Move toward more transparent and innovative financial solutions to stay competitive. Financial institutions are increasingly focusing on customer-centric strategies, utilizing advanced data analytics, and optimizing risk management practices.

Roles: CFO, Head of Risk Management, Head of Compliance, Chief Digital Officer, VP of Product Development, VP of Customer Experience

Key challenge

Consumers' expectations are evolving, leading to new demands in financial services. With a focus on personalization, fewer customers perceive a difference between traditional and digital financial institutions. Digital transformation is reshaping the financial landscape for the mutual benefit of clients, partners, and regulatory bodies

- Accelerating the development of innovative financial products and services.
- Transitioning from traditional methods to tech-driven, customer-focused solutions.
- Prioritizing and channeling investments into high-impact areas with a systematic approach.

Product Features

Why NetSuite

Key Benefit

Solutions and Key Resources

- Automating, coordinating, and enhancing project management across global operations.
- Ensuring competitive rates through data-driven pricing strategies and optimized risk assessment.
- Simplifying and standardizing processes with advanced technology, including mobile access, automation, and collaborative tools to enhance productivity.
- Ensuring partner and vendor qualifications based on financial stability, reliability, and compliance standards.
- Monitoring performance metrics to drive cost-efficiency, mitigate risk, enhance resilience, and support revenue growth.
- Streamlining product launches across digital platforms and various distribution channels.



MV Solution

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Key challenge

Product Features

Why NetSuite

Key Benefit

Financial Management

Real-time Financial Management in the Cloud Comprehensive Finance and Accounting

- Gain full visibility into your integrated financials with prebuilt, accounting-intelligent capabilities.
- Accept and process electronic payments from your customers in a secure and reliable manner.
- Track, manage and report the book value and depreciation of your company's fixed assets.
- Close with confidence and report financials quickly and accurately.
- Ensure proper security, support compliance and gain complete audit trail visibility.
- Configure and monitor business processes and workflows.
- Get immediate visibility into financial performance with pre-built or customized reports.

Budgeting and Forecasting

Customer Relationship Management

More Product Features

Business Impact

- **Timely Information and Insight**
Improve business performance with real-time metrics and role-based dashboards.
- **Close with Confidence**
Accelerate the financial close while maintaining compliance with applicable accounting standards.
- **Streamline the Back Office**
Eliminate errors with automated processes and reduce the reliance on spreadsheets.



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More Product Features

Budget, Forecast and Manage Financial Planning

- Model and evaluate unlimited “what if” scenarios between actuals and projections and update forecasts as needed.
- Establish rolling 12-month forecasts and analyze variance between actuals versus project results.
- Create and consolidate driver-based plans with customized data entry sheets and reusable formulas and allocation methods.
- Provide self-service and easy-to-use reporting across the organization.

Business Impact

- **Reduce Planning Cycle Times**

Collect inputs and assumptions, review iterations and present consolidated results in a timely manner.

- **Improve Forecast Accuracy**

Compare and analyze actual versus projected results regularly to refine forecasts.

- **Align the Organization**

Centralize your budget with forecast and actual information in one place, providing a single version of the truth.



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Key Benefit

Financial
Management

Budgeting and
Forecasting

Customer
Relationship
Management

More
Product
Features

Gain a 360-degree View of Customers

Customer Relationship Management

- Generate a single view of a customer across all channels for complete visibility into all online, and call-center transactions and interactions.
- Build rich customer profiles based on behaviors and interactions that can be made available to sales, marketing and support personnel.
- Create target segments for highly focused, personalized upsell and cross-sell campaigns and promotions.
- Understand your customers' true lifetime value.
- Reduce service costs, improve customer satisfaction and retention, and provide a consistent customer service experience across all channels.

Business Impact

- **Improve Customer Relationships**

A true 360-degree view of the customer, including sales, support cases and financial transactions.

- **Efficient Accounts Management**

Create a holistic view of all accounts and their contacts with related activities in a single view.

- **Boost Sales Productivity**

Enable effective collaboration and team selling to streamline the sales cycle.



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Product Features

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Key Benefit

Revenue Management

Report Revenue with Confidence and Accuracy

Revenue Management

- Automate revenue recognition with financially intelligent capabilities to report results in accordance with accounting standards.
- Automatically generate and dispatch invoices at recurring intervals on time.
- Schedule renewals automatically or set reminders in advance to pursue upsell and cross-sell opportunities.
- Package and offer the service you want based on the type of rates and duration needed.

Human Capital Management

Procurement

More Product Features

Business Impact

- **Timely Information and Insight**

Improve business performance with real-time access to revenue-related ending balances and revenue recognized.

- **Streamline the Process**

Take control of recurring processes by automating billing cycles and renewal periods.

- **Align the Organization**

Unify all stakeholders with one system, from sales and service reps to finance managers and executives.



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Revenue Management

Human Capital Management

Procurement

More Product Features

Maximize The Value of Your Company's Most Important Resource

Human Capital Management

- Get complete human capital management capabilities and streamline processes by providing tightly integrated recruiting, HR, talent management, time accounting and payroll.
- Improve employee and management satisfaction and retention with complete self-service functionality and managerial approval workflows that allow employees to perform, and track, many transactions themselves.
- Easily manage complex commission plans to drive corporate goals.
- Empower your employees with complete accessibility, visibility and automation of workplace events.

Business Impact

- **Simplify Core HRIS**

Simplify employee resource management and easy record management and streamlined on-boarding.

- **Minimize Payroll Headaches**

Reduce payroll administrative overhead, and the risk of errors, with NetSuite's complete payroll management capabilities.

- **Attract and Retain the Right Employees**

Inspire and motivate a modern workforce with mobile, social and cloud at the heart of the system.



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Product Features

Why NetSuite

Key Benefit

Optimize Company Savings With Better Spend Management

Spend Management

- Request approval to procure goods and services quickly and easily.
- Optimize procurement for recurring needs with negotiated terms, tiered pricing, and pre-specified delivery schedules.
- Enforce compliance with purchasing thresholds and guidelines.
- From acquisition through payment, automate the complete procurement process for goods and services.
- Accept a variety of credit and debit card types and other electronic forms of payment for online payment processing needs.
- Establish budget and spend controls to ensure compliance with policies.
- Maximize the accuracy and timeliness of your timesheet and expense processes with online self-service tools.
- Gain real-time visibility into the spending trends across your organization.

Business Impact

- **Control Spend**

Automate the procure-to-pay process and drive greater visibility into spend.

- **Ensure Compliance**

Configure requirements, authorizations and approvals.

- **Engage Users**

Simple, intuitive user interface makes it easy for users to engage with the system.

Revenue Management

Human Capital Management

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Key Benefit

Business Intelligence

Global Business Management

Real-time Financial Management in the Cloud

Comprehensive Finance and Accounting

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Business Impact

- **Timely Information and Insight**

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Key Benefit

Business Intelligence

Global Business Management

Global Business Management NetSuite OneWorld

- Adjust for currency, taxation and legal compliance differences at the local level, with regional and global business consolidation and rollup.
- Global CRM provides visibility into every aspect of your multinational organization, even with multiple languages and currencies, including forecasts and campaigns.
- Manage inventory and fulfillment across multiple locations.
- Run multi-store/multi-country/multi-site ecommerce with country-specific web stores and websites managed from a single NetSuite account.

Business Impact

- **Efficiencies**
Manage your entire global operations on a single unified platform.
- **Rapid Financial Close**
Real-time management and financial automation capabilities can significantly reduce time to close.
- **Visibility**
Role-based dashboards provide instant insight across the hierarchy of subsidiaries.



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Key Benefit

- **Embrace Change.**

Enhance your business agility, swiftly respond to regulatory and market shifts, and proactively address the changing needs of your customers.

- **Optimize Compliance.**

Manage risks and monitor performance through fully auditable business processes and comprehensive enterprise analytics.

- **Foster Innovation.**

Update your systems to boost speed to market and drive accelerated growth.



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Key Benefit

The key benefit of NetSuite ERP for the Financial Services industry lies in its ability to centralize and streamline financial operations, offering real-time visibility and control over key financial processes. This cloud-based solution enhances operational efficiency, regulatory compliance, and financial reporting accuracy. Key benefits include:

- **Enhanced Financial Reporting and Compliance:**

NetSuite ERP automates complex reporting and audit processes, enabling financial institutions to meet regulatory requirements with greater ease and precision. It offers built-in compliance controls that adapt to changing regulatory landscapes.

- **Real-Time Financial Data:**

With a unified view of financial data across departments, NetSuite enables faster decision-making and strategic planning by providing instant access to real-time metrics and dashboards, tailored to financial KPIs.

- **Customer-Centric Solutions:**

NetSuite's CRM and client relationship tools integrate with ERP to create a 360-degree view of customer data, enabling financial institutions to enhance customer service, personalize offerings, and build stronger client relationships.

- **Scalability and Flexibility:**

NetSuite ERP grows with the business, supporting expansions, acquisitions, and new financial products seamlessly without extensive IT costs, making it ideal for financial institutions that need scalable and adaptable solutions.

- **Automated Workflows for Efficiency:**

From transaction processing to revenue recognition and expense management, NetSuite automates key processes, reducing manual work, minimizing errors, and allowing financial professionals to focus on higher-value activities.