



NETSUITE BPO PARTNER PROGRAM A BURGEONING SUCCESS FOR HA&W

Partner Overview

HA&W, LLP, headquartered in Atlanta, Ga., is a nationally recognized tax, audit and business advisory firm. The firm's expertise spans a broad range of services and industries, enabling it to provide clients with winning financial practices and insights to help them grow at every stage of their business lifecycle. Founded in 1952, HA&W serves clients located in 49 of the 50 states in the U.S. as well as in over 40 countries internationally.

HA&W was named a "Best of the Best" firm in 2016 by *INSIDE Public Accounting*. *The Daily Report*, a legal publication, recognized HA&W as a "Best of the Best" accounting and forensic accounting firm in 2016.

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William Estes, Director of Client Accounting Services, HA&W



Business Challenge

“Since our founding,” explained William Estes, Director of Client Accounting Services, “HA&W has focused on leading with a purpose. Our heritage as an accounting industry leader is one of innovation, and we’ve always looked forward for new opportunities to create value, whether through spearheading the paperless push or substantially increasing our business consulting offerings. This commitment to innovation allows us to continually deliver services that help clients grow.”

It was with innovation in mind that HA&W decided to launch a formal Business Process Outsourcing (BPO) division geared toward accounting services. Estes was recruited in 2015 to develop and lead this new division. His initial tasks were to draft a business plan for the new division and identify the technology HA&W would use to manage financial processes including AP, AR, report generation, analytics and more for existing and new clients.

“HA&W has always provided some outsourced accounting functions for clients,” Estes said, “but it never had a division dedicated to providing these services. The firm saw this as an area that had a lot of potential to provide value to our clients.”

HA&W Selects NetSuite Based on a Demanding List of Criteria

With an extensive and unique combination of experience in finance and technology consulting and implementation, Estes understood that one of the most important components of the new BPO division “was going to be the tech stack”.

His evaluation criteria in researching the possible technology solutions to power the division included: proven success in similar implementations, scalability (both in terms of the ability to manage increasing numbers of clients and scalability across multiple industries), mobile support, a broad range of native, integrated functionality (e.g. ERP, CRM, ecommerce), the ability to customize the solution to address unique client requirements, and the ability to handle international requirements and currencies. First and foremost, however, the solution had to be cloud-based.

Estes researched numerous solutions and quickly narrowed the field down to four: NetSuite, Intacct, QuickBooks and Xero.

Estes also wanted a partner that had an established and well-run BPO partner program that HA&W could depend on for support, including training, guidance, informational materials and other resources.

“As we got closer to making our decision,” said Estes, “there were a few other factors that ultimately helped make the decision easy for us. We wanted a solution that would enable us to pre-configure and pre-customize templates and forms for clients. We found that NetSuite allows you to build these configurations and customizations one time and essentially drop them as bundles into new client accounts, which would enable us to have a very standardized environment across all of our clients. NetSuite’s bundles capability eliminates the need to create these customizations individually for each client. It’s a much more efficient way to get clients up and

running rapidly and to make subsequent changes as new requirements arise.”

“Finally,” Estes added, “The folks we met with at NetSuite seemed genuinely motivated to help us succeed, as opposed to viewing us as simply another transaction. We felt that we could have a long-term, mutually beneficial relationship with NetSuite. That further increased our confidence in choosing NetSuite as the core technology platform for HA&W’s BPO practice.”

Advantages to Partnering with NetSuite for BPO

NetSuite, the world’s number one cloud ERP vendor, provides a suite of cloud-based financials/Enterprise Resource Planning (ERP) and omnichannel commerce software that runs the business of more than 30,000 companies, organizations, and subsidiaries in more than 100 countries. It is also a company that prides itself on building and maintaining strong partnerships, and views its partners as crucial to its own success. As a consequence, NetSuite has built a number of well-designed and well-staffed partner programs to bring the benefits of cloud-based financial management to ever-increasing numbers of organizations worldwide.

The NetSuite BPO program was launched in response to demand from BPO providers for a unified cloud-based solution comprising ERP, CRM and ecommerce that would enable them to support clients of any size—from small start-ups to multi-national Global 2000 corporations.

The BPO Partner Program enables BPO providers to capitalize on new business opportunities by:

- Providing access to the world’s leading cloud business management platform, and in doing so, equipping their BPO practices with a single, flexible, reliable, secure solution that has proven its ability to satisfy even the most demanding clients.
- Enabling BPO providers to avoid large capital investments, reduce operational costs, and speed time to value compared to traditional on-premise systems.
- Eliminating the need for custom coding to build sophisticated client workflows by leveraging NetSuite SuiteFlow.
- Increasing efficiency in meeting client requirements by using SuiteBundler to bundle and deploy a single configuration across multiple clients to speed onboarding, manage versioning and enhance overall flexibility.
- Expanding traditional accounting offerings by offering CRM and ecommerce services from the same platform.
- Enabling clients to focus on their core businesses rather than on acquiring, maintaining and managing IT systems.
- Demonstrating BPO providers’ innovative and value added approaches to helping clients grow and prosper.
- Designating NetSuite partner managers to provide BPO partners with access to training, support, marketing materials and co-op programs to help ensure partners’ success.

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Becoming a NetSuite BPO Partner Has Been a Clear Cut Success Story

“In just the relatively short time we’ve been a NetSuite BPO Partner, it’s become obvious to us that our decision to partner with NetSuite was a very good one,” Estes said. “We’ve just begun our renewal season, and clients are renewing. In fact, one client wants us to add four more companies! You’ve got to love when something multiplies like that. We’ve surveyed our clients, and they’re very happy with how things are going.

“I’d be remiss if I didn’t mention that NetSuite’s pricing model for the BPO channel is very attractive to us,” added Estes. “It makes it easy for us to demonstrate the superior value of going with NetSuite versus something like QuickBooks, when the cost to the client is about the same. It’s definitely been a success story for us.”



Partner Snapshot

Company: HA&W

Location: Atlanta, Ga.

Industry: Accounting and business advisory services

Employees: 400