



Circle of Friends

www.circle-of-friends.com



At A Glance:

- **Company:** Circle of Friends
- **Location:** Santa Monica, CA
- **Industry:** Distribution/Wholesale; Manufacturing
- **Challenge:**
 - Lack of integration between previous back-end processes, customer management, and Web store systems
 - Losing productivity due to repeated, inefficient processes
- **Software switched from:** PeopleSoft, QuickBooks, GoldMine
- **Results with NetSuite:**
 - Saving at least 1.5 employees in productivity gains
 - Developing intelligent and integrated views of customer behavior and internal operations

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— Eleanor Keare, President
Circle of Friends

The Results:

Circle of Friends implemented NetSuite to bring order and unity to its back-end processes and customer-facing efforts. Using NetSuite for everything from bill payment to inventory tracking to online retail, the company has successfully brought its key business processes under one roof.

For the first time in the company's ten year history, systems and process flow are integrated. "Because of NetSuite, we no longer have to go through a lot of separate, repetitive processes to conduct business," notes Eleanor Keare, President of Circle of Friends. By having a Web store linked with NetSuite's Customer Center and inventory module, customers now know exactly what is in stock and ready to ship, rather than having to place an order and wait for manual confirmation. The greater customer/company connection has brought value to Circle of Friends in non-sale situations as well. "The fact that someone can sign up for a newsletter, fill out a questionnaire, and have that information all be part of their customer record is absolutely terrific," says Eleanor.

Circle of Friends has been able to use NetSuite transparently in its mixed IT environment, where both Macintosh and Windows-based PCs run three different internet browsers. The company did not have to change how its employees used their computers in order to make use of the NetSuite customer and order management systems, and has gained substantial productivity advantages with the new approach.

"For the first time, our telecommuters, our traveling sales people, and our employees who prefer Macs have all the same advantages and capabilities as people on PCs in the home office. When you also consider that a Mac or remote worker can do so much more under NetSuite than our core workers could do under previous systems, it's really amazing," notes Eleanor. "In fact, if you added up everything, from the customer acquisition side through the FedEx shipping integration, we have been able to take about one and a half full-time equivalents, who used to shepherd orders through all the various



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The Challenges:

Circle of Friends sells personal care products for children in North America and Australia. When husband and wife management team Eleanor Keare (President) and Brian Keare (CFO) took over ownership of the company, its enterprise systems left something to be desired. “Even after more than a half a million dollar implementation of PeopleSoft, the previous parent company couldn't generate the financial or operational reports we needed to run our business. The system was slow, impossibly complicated, and almost tanked the business,” Brian Keare says. Moreover, the website, which worked well by itself, was not properly integrated with the PeopleSoft system, leading to a great deal of data and order re-entry to complete sales.

Ready to ditch PeopleSoft, the new owners quickly decided against reverting to the previous QuickBooks plus GoldMine way of operating the business. “We had spent a lot of time integrating those two as best we could, but none of the integration attempts were ever remotely satisfactory,” says Eleanor. Playing catch-up with disconnected processes had cost Circle of Friends important hours every day — a precious resource with just twelve employees operating an international business.

The Solution:

Circle of Friends adopted NetSuite to solve its front- and back-end technology problems and found the on-demand solution met its unique needs as a growing manufacturer and distributor. NetSuite's Advanced Inventory module offered kits and assemblies, in addition to inventory items and item groups that help coordinate the product acquisition and wholesaling business, straight through to shipping. “We started with FedEx integration the day after NetSuite released it to its customers, and it has really worked well for us,” Eleanor says.

NetSuite's financial management and reporting modules make it easy for the Keares to monitor the progress of the business and customer development. Circle of Friends has consolidated a number of its customer outreach programs under the NetSuite functionality, including fully tracked outbound e-mail marketing campaigns. Brian notes, “Not only does NetSuite summarize the effectiveness of our marketing campaigns, but you can even go into a customer record and see if they read your e-mails.”

Now enjoying the benefits of a smooth-running operation, nobody at Circle of Friends is looking back. “When I joined Circle of Friends three years ago, I lived through QuickBooks Enterprise, GoldMine, and then the PeopleSoft implementation which was imposed from above,” Eleanor says. “I can't tell you how glad I am to have all of that behind us. With NetSuite, we finally have a solid, integrated foundation that enables us to successfully grow our business. ”

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