

How Zone & Co automates data workflows and unlocks scalable insights with Tactical Connect

TacticalConnect

Zone & Co, a fast-growing SaaS provider, faced the same challenges as many of its customers: manual data exports, siloed systems and limited reporting capabilities inside NetSuite. As the business scaled through acquisitions, the need for accurate, consolidated data across NetSuite, Salesforce and legacy systems became critical.

Everything changed when Zone implemented **Tactical Connect** to automate the flow of data out of NetSuite and into its central data warehouse. With Tactical Connect, Zone eliminated manual reporting, reduced errors and created a single source of truth for finance and operations. Today, data is refreshed daily and accessible across teams, powering everything from ARR reporting to acquisition integration.

The Challenge: Data exports and manual refreshes holding back growth

As Zone grew from 50 employees to a global team with 4+ subsidiaries, manual reporting processes that once worked quickly became bottlenecks.

- ◆ **Manual exports and inefficiencies:** Reports had to be downloaded from NetSuite into Excel and manually refreshed, consuming hours of time.
- ◆ **Siloed data sources:** With Salesforce, NetSuite, and multiple acquired systems in play, teams lacked a consolidated view of customers, contracts and invoices.

www.zoneandco.com

Company Size: 250+ employees

Industry: SaaS / Fintech

Headquarters: Global

Customer since: 2022
(using Tactical Connect)

Products: Tactical Connect

Integrated software: NetSuite,
Salesforce, SQL Server

Business Intelligence, RevOps,
FP&A, Sales

Key Outcomes:

- ◆ 100% automated NetSuite data extracts
- ◆ 98% faster exports and refreshes
- ◆ 50 hours of manual work on report requests eliminated monthly
- ◆ 2 NetSuite instances supported with Tactical Connect





“The need for Tactical Connect came from wanting to automate what I was doing manually. Instead of downloading data and importing it myself, I can now configure a search in NetSuite, set a schedule, and trust that the data will move the same way every time.”

- Eric Johnson,
Director of Business Intelligence, Zone & Co

- ◆ **Complex calculations:** ARR and contract value reporting required business logic too complex for NetSuite alone, forcing BI teams to rely on workarounds.
- ◆ **Scalability risks:** As data volumes increased, Excel could no longer keep up. Large files crashed frequently, slowing down decision-making and frustrating teams.

What did they decide?

The Zone BI team set its sights on a tool that could automate data exports directly from NetSuite, eliminate manual refreshes, and deliver consistent, daily feeds into its SQL-based data warehouse. Tactical Connect fit perfectly.

The Solution: Automated NetSuite data pipelines with Tactical Connect

To eliminate the heavy lift of manual exports, Zone & Co implemented Tactical Connect, which took minutes to install. This allowed the BI team to move from ad hoc, error-prone exports to a reliable pipeline into Zone Data Warehouse that refreshed every day without intervention.

- ✔ **Seamless setup:** Deployed quickly by configuring endpoints to the company's data warehouse and blob storage.
- ✔ **Flexible scheduling:** Searches are scheduled to run daily, pushing data into the warehouse automatically.
- ✔ **Configurable exports:** Adding new data fields or tables takes minutes instead of days, eliminating the need for custom scripts.
- ✔ **Cross-system insights:** Zone used Tactical Connect to bring NetSuite invoice and customer data into Zone Data Warehouse, where they easily blended in Salesforce opportunity data. This created consolidated ARR and contract value reporting across entities.





“It’s just a SuiteApp within NetSuite, so it lives directly in the system. Once you set up the connection, you can configure any number of searches and schedules, and it works seamlessly.”

– Eric Johnson,
Director of Business Intelligence, Zone & Co

The Results: Automated accuracy and scalability across teams

Tactical Connect didn’t just streamline the BI team’s workflow, it reshaped how data flows across the entire organization. What was once a manual, error-prone process is now an automated pipeline that scales with the business.



Hours saved daily: Gone are the days of downloading and stitching together dozens of spreadsheets. Configuring and refreshing reports that once took hours can now be completed in 5 minutes.



100% automation for improved accuracy and trust: Manual work meant variation: different people pulling data slightly differently, scripts breaking or accidental edits introducing errors. With Tactical Connect handling the transfer, data now moves consistently and predictably every day, eliminating those discrepancies and giving finance, RevOps and FP&A greater confidence in the numbers.



Faster insights: Complex calculations such as ARR, which were difficult to manage inside NetSuite alone, are now standardized and automated once data hits the warehouse. This has allowed the team to produce consolidated reports across multiple systems, including legacy acquisitions, and deliver insights faster to leadership.



“Tactical Connect ensures the data moves the same way every time, and you can trust what you’re working with.”

– Eric Johnson,
Director of Business Intelligence, Zone & Co



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“Tactical Connect works great. It’s the steady giant that works behind the scenes. I can count on the fact that if I go into NetSuite and configure something, it’s gonna move successfully.”

- Eric Johnson,
Director of Business Intelligence, Zone & Co



Cross-team enablement: Tactical Connect supports more than just BI. RevOps, FP&A, and Sales all consume the data it provides, often without realizing the automation running behind the scenes. By serving as the quiet backbone of reporting, Tactical Connect ensures every team has reliable, up-to-date data at their fingertips.

Zone & Co’s experience with Tactical Connect mirrors the journey of its customers: growing from manual processes to automated, scalable systems. By embracing its own product, Zone not only improved efficiency and accuracy internally but also gained invaluable insight into how Tactical Connect delivers value in real-world use cases.



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