Zone&Co

From marathon to sprint: How Solution 7 accelerates reporting for Zone's accounting team

solution7
by **Zone**

Zone & Co's, finance and accounting team lives with the same pressures as its customers: executives want answers now, close timelines are tight and every manual step introduces risk.

Before adopting **Solution 7 by Zone,** much of Zone's reporting and analysis relied on exporting reports from NetSuite into Excel, copying and pasting data into complex templates and maintaining multiple file versions throughout the close. It worked, but it was slow, error-prone and unsustainable as reporting demands grew.

Today, Solution 7 has become the accounting team's reporting engine. Templates refresh directly from NetSuite in seconds. Close-impacting questions, like how a proposed entry changes EBITDA, working capital or cash flow, can be answered in minutes instead of hours. And processes that once took 1.5–2 hours now run in 10–15 minutes, freeing the team to focus on the decisions that really matter and bridge the gap between functions by delivering a clearer, faster narrative behind the numbers.

The Challenge: Manual reporting processes slowing close and limiting visibility

As Zone's accounting team took on tighter close timelines and growing reporting requirements, the manual, export-heavy processes that once

Zone & Co

Website: **zoneandco.com**

Industry: **SaaS / Fintech**

Headquarters: **Global**

Company size: **250+ employees**

Customer since: **2024 (using Solution 7)**

Products: **Solution 7**

Involved teams: **Finance & Accounting**

Key Outcomes:

◆ **90%+ reduction** in reporting time

◆ **67%+ quicker visibility** into financial variances

◆ **100% automated** multi-statement reporting

◆ **1 refreshable Excel workbook,** eliminating version sprawl

worked quickly became bottlenecks. Leadership needed answers fast, but the team was still tied to downloading reports, copying data into templates and managing dozens of file versions throughout the close.

◆ **Disconnected processes and copy-paste risk**

The legacy workflow relied on building reports in NetSuite, exporting them to Excel and manually refreshing each template. Even small updates required re-downloading a report, saving new versions, adjusting formula ranges and validating formulas—an approach filled with risk of broken formulas, overwritten cells and inconsistent schedules. For some processes, the team was managing 20–22 file variations for a single reporting cycle.

◆ **Slow refresh cycles and delayed insights**

Re-running a P&L analysis or balance sheet roll-forward often took hours, delaying critical conversations. Leadership needed to know:

  ◆ **How does this entry impact EBITDA?**

  ◆ **What does this do to working capital and cash flow?**

  ◆ **Where are variances appearing month over month?**

But manual refresh cycles meant these insights often surfaced on Day 6–8 of close, leaving little time to investigate or correct issues.

◆ **The need for a real-time, NetSuite-connected solution**

Zone needed a reporting tool that could eliminate copy-paste steps, refresh data directly from NetSuite, reduce file sprawl and accelerate visibility into the P&L Balance Sheet, and Cash Flow. A solution powerful enough to support fast-growing reporting needs, yet simple enough to replicate at scale.

Solution 7 delivered exactly that, replacing hours of manual work with instant, refreshable, Excel-native reporting.

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> "Any time you have a manual copy and paste, there's potential for error. We were saving files down, copying and pasting, updating formulas and creating version after version. It was cumbersome and risky."
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> - **Curt McKinney,**
> Director of Corporate Accounting, Zone & Co

> "If you have the day-to-day nailed down with Solution 7, you can quickly identify problem issues and focus more time on the complex transactions that need well-thought-out decisions."

— **Curt McKinney,**
Director of Corporate Accounting, Zone & Co

The Solution: Real-time financial visibility powered by Solution 7

Solution 7 brought automation and structure to Zone's reporting process by replacing manual exports with real-time NetSuite connectivity inside Excel. Instead of downloading and validating reports for every refresh, the accounting team now updates their P&L, balance sheet and reconciliation schedules with a single click.

Curt rebuilt critical financial reporting templates using Solution 7, transforming what used to be fragmented file versions into one connected workbook. The team now updates dozens of tabs instantly—accelerating close, improving accuracy, and making it easy to surface issues earlier.

Why Solution 7 worked:

✓ **Real-time NetSuite data**: Live refresh populates current balances across all statements in seconds.

✓ **Multi-level detail:** Drill down by department, vendor, legal entity, or month—all within Excel.

✓ **End-to-end close automation:** Roll-forwards, account reconciliations and allocation processes refresh automatically.

✓ **Excel-native flexibility:** The team uses formulas, lookups and formatting exactly as before, now powered by live data instead of exports.

✓ **Scales with the team:** Solution 7 supports new templates easily, enabling the team to automate more processes month after month.

"Solution 7 kind of builds a bridge between where we're at and where we need to go. It accelerates reporting and gives us the versatility we need in a world that's only getting faster."

- **Curt McKinney,**
Director of Corporate Accounting, Zone & Co

The Results: Faster reporting, fewer errors, and dramatically shorter close cycles

Solution 7 has transformed the way Zone's accounting team manages financial reporting, and gives FP&A and other departments the timely, consistent data they need to plan, forecast, and understand the story behind the numbers. What once required hours of manual exports, copy-paste steps, and multiple file versions is now an automated, refresh-based workflow embedded directly into Excel. With real-time NetSuite connectivity, the team surfaces insights earlier, resolves issues faster, and executes close with far greater confidence.

90%+ reduction in reporting time:
Processes that historically took 1.5–2 hours now update in 10–15 minutes. With a single refresh repopulating entire multi-tab workbooks, the team has gained back significant hours each month that previously went to manual recalculations, file updates and error-checking.

67%+ quicker visibility into financial variances:
Solution 7 gives the team real-time visibility into P&L shifts. Zone's finance team has become more proactive in identifying potential challengers earlier in the process— gaining insight that previously would have surfaced on Day 6–8. This accelerated visibility enables earlier conversations with department leads, faster root-cause analysis and fewer last-minute surprises.

Elimination of version sprawl and formula risk:
Instead of managing 20–22 file versions for a single reporting process, the team now maintains one refreshable workbook. With Solution 7 powering all formulas, dependencies, and drilldowns, they've eliminated the risk of overwriting formulas, breaking cell references or introducing inconsistencies across tabs.

Fully automated multi-statement reporting:

Solution 7 now drives Zone's P&L, balance sheet, and in-progress cash flow templates, giving leadership consistent, up-to-date reporting at monthly and quarterly intervals. What used to be manual, disjointed processes are now tightly connected through a single source of truth that refreshes in seconds.

Future-proof scalability:

Because Solution 7 is Excel-native and template-driven, new processes, schedules, and analysis files can be built quickly. The team has already expanded its use to vendor-level reporting, department analytics, and upcoming cash flow automation. As the business grows and reporting complexity increases, Solution 7 provides a scalable, repeatable framework that keeps pace with Zone's needs.

Zone&Co

Finance without friction. NetSuite elevated.

Zone is the financial operations platform used by 4,500+ NetSuite customers. Our billing, AP automation, reporting and payroll solutions are embedded inside of NetSuite — so you have no integrations, no sync errors and no limits to your growth.