

# How Certified Collision Group streamlined its financial reporting and budgeting in Excel and attracted external investors with Solution 7 by Zone & Co



**Certified Collision Group** (CCG) is America's fastest-growing network of OEM-certified, independently owned and operated collision repair centers. After a sustained period of organic growth, CCG decided it was time to attract external investors. However, to do this, they would need to formalize their financial operations and optimize their NetSuite instance to reduce reliance on inefficient manual strategies.

## **The Challenge:** Losing hours of productivity every week through manual data transfers from NetSuite to Excel.

CCG offers procurement services and insurance relationship management for 400+ body shops across the USA. That represents an enormous amount of data that has to be consumed and reconciled to generate reports, and it's a significant challenge for any business's core tech stack.

Up to this point, CCG had relied on classic Excel spreadsheets and manual replication and reconciliation to manage the workload. To keep up, COO Chris Chase was spending 10-15 hours a week on

**Certified Collision Group.** (CCG) has rapidly become the fastest-growing network of independently owned and operated collision repair centers in the United States, all of which are certified by Original Equipment Manufacturers (OEMs). CCG offers a comprehensive range of services, including procurement solutions that streamline supply chain management and insurance relationship support to foster strong partnerships with insurers. Currently, the Group serves over 400 body shops nationwide, providing them with the resources, tools, and industry expertise needed to deliver high-quality, OEM-approved repairs and customer service.

Industry: Procurement & Membership

Headquarters: USA

Company size: 11-50 employees

Products: Solution7

Integrated software: NetSuite ERP and Excel

Involved Teams: Finance

### **Key Outcomes:**

- ◆ 10-15 hours saved per week

report creation, and it interfered with other critical tasks he and his team needed to focus on to grow the business.

Not only was this strategy inefficient – affecting the timeliness, accuracy and presentation quality of the reports he generated – but it was a potential red flag for investors who were looking for mature financial operations that would support long-range growth and scaling.

In anticipation of these challenges, CCG implemented NetSuite to formalize its financial processes and increase overall efficiency. This delivered innumerable benefits across the business, but there were still many stakeholders who did not use NetSuite in their daily workflow. That meant CCG would still have to generate reports in Excel for many departments.

### The biggest challenge?

Chris needed a tool that would support seamless data transfers between NetSuite and Excel so reports could be easily managed, analyzed and shared with any department across the business. Crucially, these reports and dashboards would need to be flexible enough to offer different perspectives to various key stakeholders without impacting the core setup of their NetSuite instance.

Also, because of the varied approaches to data at CCG and the high number of external partners, any solution they adopted would need to be seamlessly implemented to minimize disruptions. A complicated onboarding could cause serious internal issues as well as negatively impact potential investors who were observing the company's financial operations.

CCG would need to find a turnkey solution to its reporting challenge that could generate accurate, clean, flexible reports in Excel on the fly that team members could leverage with the skills they already had.

### The Solution: Accelerating flexible reporting in Excel with Solution 7 by Zone & Co

CCG began exploring software solutions that could bridge the gap between NetSuite and Excel. The valuable data NetSuite produced for the finance team would have to be seamlessly replicated in Excel while allowing leaders like Chris to manipulate and enhance these reports for any audience.

To achieve this quickly and easily, this solution must be capable of:

- ◆ Delivering effortless, customizable report generation in Excel with drill-down and drill-back directly to NetSuite.



“The Solution 7 product is fantastic because it allows a lot of flexibility in bringing the financial reporting and budgeting information into Excel. I can also take that same Excel spreadsheet and create graphics and dashboards I can communicate to my board and other key stakeholders in my business.”

- **Chris Chase**  
CCG COO, Certified Collision Group

- ◆ Offering a wide range of dashboards and pre-built reports that support multiple perspectives for stakeholders and external partners.
- ◆ Preserving each stakeholder's preferred software environment.
- ◆ Supporting real-time insights while eliminating time-consuming manual processes.

While there were several options on the market, the vast majority offered only partial functionality or would require significant compromises from a variety of users. After careful consideration, CCG selected **Solution 7 by Zone & Co** as an ideal software integration that would meet all of their reporting, operational and strategic needs.

### Why was Solution 7 by Zone & Co the right choice?



**Enhanced Excel reporting.** Solution 7 is a NetSuite SuiteApp that allows Excel users to leverage NetSuite's data entirely within the application – there's no need to learn NetSuite's back-end functionality.



**Extreme reporting flexibility.** Because data moves seamlessly from NetSuite to Excel and vice versa, reports can be generated in any preferred format while maintaining CCG's core financial setup.



**Ease of onboarding and excellent customer support.** As a native SuiteApp, Solution 7 requires minimal training for both NetSuite and Excel users.



“[Implementation was] very quick and painless. [Zone & Co] walked me through the initial setups, provided great one-on-one training, and we have run into no issues with the product at all.”

- **Chris Chase**  
CCG COO, Certified Collision Group



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3



“What used to take me 10 to 15 hours a week is now just the click of a button. [This allows] me to spend more time driving the operation of my business and less time worrying about reports.”

- **Chris Chase**  
CCG COO, Certified Collision Group



**Drastically reduced manual workflows.** Solution 7 eliminates errors and lost resources by replicating NetSuite data directly in Excel through a simple tab.

## The Results: Rapid, flexible reporting that showcases financial maturity for potential investors

By implementing Solution 7 by Zone & Co, CCG has been able to enhance its reporting capabilities without sacrificing the speed and flexibility its business model demands. This has allowed CCG to pursue its core business objective of attracting external investors by delivering the following benefits:



**Increased efficiency of financial reporting and budgeting.** By investing in NetSuite and extending its capabilities with Solution 7 by Zone and Co, CCG has freed up valuable time and resources for its leadership and finance team to focus on high-touch activities.



**Growth and scaling-oriented business model.** Rather than relying on manual processes that ultimately fail to keep pace with rapid growth, CCG's data architecture is prepared for the future with systems that are highly scalable.



**Businesswide software solutions.** Rather than focusing on individual departments or siloed business needs, investments like Solution 7 support cross-functional workflows that help maximize the value of all your systems.



“[Solution 7] just saves us time and makes everything so easy. I couldn't hope for a better solution. It provides an incredible amount of flexibility and saves a tremendous amount of time in communicating reporting out to any external partner.”

- **Chris Chase**  
CCG COO, Certified Collision Group



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## Powerful, scalable NetSuite financial reporting in Excel with Solution 7 by Zone & Co

CCG's success with Solution 7 demonstrates that a digital transformation doesn't have to mean tearing up your company's playbook and starting from scratch. By selecting the award-winning SuiteApp, they were able to extend the capabilities of their stakeholders' preferred Excel environments to generate fast, accurate and engaging reports for any business requirement at hand.

3,000+ businesses like yours trust Zone & Co to combine the full power of NetSuite with the ease and flexibility of Excel for all their reporting needs. [Book a personalized demo](#) of Solution 7 to see how you can increase your financial reporting power in practice.



### Finance without friction. NetSuite elevated.

Zone is the financial operations platform used by 4,000+ 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.