



# From Whiteboards to Real-Time Production

Case Study

# Building a Platform for Growth on NetSuite —A LEAP STORY

A manufacturer of precision components used by scientists and researchers worldwide had outgrown entry-level accounting software, spreadsheet reporting, and shop floor whiteboards. To keep growing, the company selected NetSuite, backed by LEAP's implementation team.

## CLIENT OBJECTIVES

**Get a True ERP:**

Move beyond entry-level accounting software to a system that can keep pace with growth.

**See the Production Cycle:**

Replace shop floor whiteboards with real visibility into the progress of production.

**Draw Meaningful Reports:**

Stop wrestling spreadsheets for the financial reports leadership needs.

**Stay Ahead of Demand:**

Keep adequate product on the shelf instead of scrambling to catch up.

### Before



### After



● ————— LEAP INTERVENTION ————— ●

# SERVICE OFFERINGS



## Structured Approach

Asked the right questions, prepared the data, tested, and configured NetSuite to fit.



## Live Without a Sandbox

Planned and executed closely enough to launch live without a sandbox environment first.



## CRM Integration

Recommended a connector that syncs NetSuite with the company's CRM and automates business processes.



## Expertise on Hand

Supplemented the client's team with financial, project management, and product expertise.



"Instead of chaos, we now have structure. And results."

**Manager, Manufacturing Engineering**

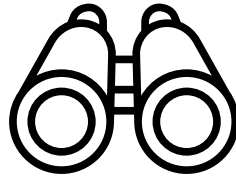


# THE BUSINESS IMPACT

Moving to NetSuite replaced whiteboards and spreadsheets with real-time data. Technicians log work as it happens, inventory follows actual demand, and the team spends its time acting on data instead of collecting it.

## 1 Real-Time Production

Technicians clock in and out of jobs on tablets at each workstation.

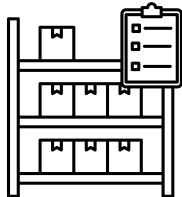


## 2 Production Visibility

The progress of production lives in NetSuite, not on shop floor whiteboards.

## 3 Time to Analyze

Teams analyze and act on data rather than spending their time collecting it.

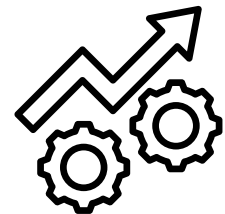


## 4 Optimized Inventory

Sales leads and open orders now guide production and stock levels.

## 5 Automated Processes

NetSuite and the CRM stay in sync, with business processes running automatically.



## 6 Structure for Growth

A true ERP now supports the company's growth trajectory.

# TRANSFORMATION SCOPE & ENGAGEMENT PHASES

This NetSuite transformation reached from the accounting office to every workstation on the shop floor, for a growing manufacturer whose components support research in medicine, energy, electronics, and more.

## THE SCOPE OF THE CHANGE



Whiteboards replaced with **real-time production tracking**



Clock-ins at **every workstation on tablets**



Live **without a sandbox** after careful planning

## ENGAGEMENT BY PHASE

1

### DISCOVERY & DATA PREP

Business needs mapped before setup.  
Existing data readied for NetSuite

2

### TESTING & CONFIGURATION

- Thorough testing before launch
- NetSuite configured to fit seamlessly

3

### GO-LIVE

- Live without a sandbox environment
- Tablets at each workstation for real-time job tracking

4

### CRM INTEGRATION

- Connector syncing NetSuite and the CRM
- Stock levels set by real demand.

# Why LEAP?

Our team of industry veterans and subject-matter experts bring decades of hands-on experience to every partnership to accelerate growth and maximize impact.

Drawing on a deep understanding of operational complexities and market demands, we'll position you for success, whether you're scaling up from current momentum or just starting to break ground.

50+ Professionals, led by industry & domain experts

8 Full-time Practice Leads

25 Full-time Engineering Professionals

| INDUSTRIES                                                                                                                                                                             |                                                                                                                                                               |                                                                                                                                                                  |                                                                                                                                                    |                                                                                                                                                          |                                                                                                                                                                |                                                                                                                                       |                                                                                                |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| Life Sciences & Diagnostics                                                                                                                                                            |                                                                                                                                                               | Healthcare                                                                                                                                                       |                                                                                                                                                    | Financial Services & Real Estate                                                                                                                         |                                                                                                                                                                | Technology & Software                                                                                                                 |                                                                                                |
| Professional Services                                                                                                                                                                  |                                                                                                                                                               | Private Equity & Investment Funds                                                                                                                                |                                                                                                                                                    | Education & Nonprofit                                                                                                                                    |                                                                                                                                                                | Industrial, Energy & Commercial                                                                                                       |                                                                                                |
| DIGITAL CXO ADVISORY SERVICES                                                                                                                                                          |                                                                                                                                                               |                                                                                                                                                                  |                                                                                                                                                    |                                                                                                                                                          |                                                                                                                                                                |                                                                                                                                       |                                                                                                |
| SUPPLY                                                                                                                                                                                 | DEMAND                                                                                                                                                        | CONNECTIVITY                                                                                                                                                     | PLATFORMS                                                                                                                                          | ARCHITECTURES                                                                                                                                            | INFO SEC & COMP                                                                                                                                                | GOVERNANCE                                                                                                                            | M & A                                                                                          |
| <ul style="list-style-type: none"><li>• Functional Groups</li><li>• Leaders</li><li>• Skillsets &amp; Teams</li><li>• Staff Aug &amp; Vendors</li><li>• On Shore/ Off- Shore</li></ul> | <ul style="list-style-type: none"><li>• Clients &amp; Sponsors</li><li>• Sources of Demand</li><li>• Demand Planning</li><li>• Tracking Commitments</li></ul> | <ul style="list-style-type: none"><li>• Voice &amp; Data Telco</li><li>• LAN/WAN/VAN</li><li>• Client &amp; Vendor EDI</li><li>• Remote Work &amp; CTI</li></ul> | <ul style="list-style-type: none"><li>• Colo vs. Cloud</li><li>• IaaS vs. PaaS</li><li>• Custom Vs. COTS</li><li>• Infra &amp; Cloud Ops</li></ul> | <ul style="list-style-type: none"><li>• Biz &amp; Data Arch.</li><li>• Enterprise Arch.</li><li>• System Arch.</li><li>• Event &amp; Data Maps</li></ul> | <ul style="list-style-type: none"><li>• Perimeter Security</li><li>• Identities &amp; Access</li><li>• Apps &amp; Storage</li><li>• Audit &amp; Docs</li></ul> | <ul style="list-style-type: none"><li>• Strategic Goals</li><li>• Roadmaps Release</li><li>• Plans Mgmt</li><li>• Reporting</li></ul> | <ul style="list-style-type: none"><li>• Diligence</li><li>• Plan</li><li>• Integrate</li></ul> |
| TURNKEY TECHNOLOGY DELIVERY SERVICES                                                                                                                                                   |                                                                                                                                                               |                                                                                                                                                                  |                                                                                                                                                    |                                                                                                                                                          |                                                                                                                                                                |                                                                                                                                       |                                                                                                |
| Needs Assessment                                                                                                                                                                       | Requirements                                                                                                                                                  | Sourcing & RFPs                                                                                                                                                  | Program Management                                                                                                                                 | Prototyping PoCs                                                                                                                                         | Hardware Build                                                                                                                                                 | Mobile Native Apps                                                                                                                    |                                                                                                |
| Incubation Ideation                                                                                                                                                                    | Tech Design                                                                                                                                                   | Consumer Web                                                                                                                                                     | Vendor Management                                                                                                                                  | Release Planning                                                                                                                                         | Enterprise S/W                                                                                                                                                 | Org. Change Mgmt & Go-to-Market                                                                                                       |                                                                                                |



## Speed Meets Strategy

We operate with precision to implement nimble, high-impact solutions that align with your objectives without slowing down your processes.



## Experts Who Adapt

No one knows your business better than you. We show up ready to listen, understand, and adapt to your situation, and then fine-tune our approach to best address your goals.



## Focus on Enablement

LEAP isn't here to take over for you, just get you on the right track. We equip your team with tailored systems, strategies, and solutions that empower you to take the back wheel.

# Want To See How Fast You Can Move?

**Let's talk about your roadmap.**

Contact us at [starthere@leapcg.com](mailto:starthere@leapcg.com)  
or visit [leapcg.com](http://leapcg.com) to schedule a 30-  
minute strategy session with LEAP's  
transformation team.