ORACLE NetSuite

BUSINESS GUIDE

AI Playbook: Your Path to AI Adoption

Three Essential Steps From Readiness to Real Results

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Introduction

Many organizations are looking to apply artificial intelligence within NetSuite to take full advantage of their data. But where will AI have the most positive impact? It's not always obvious which workflows are best suited for AI assistance or how existing processes align with the types of tasks AI can support. This may make it difficult to set realistic expectations and find areas where the technology can deliver ongoing value.

This guide outlines key considerations for getting started and offers a practical framework for assessing readiness, identifying high-value early use cases, enabling AI securely, and building a phased roadmap that supports long-term growth.

1. Assess your organization's AI readiness

Successful AI adoption starts with understanding where your organization can most benefit. Start by building a short list of processes that are already well defined and rely on your NetSuite data, such as revenue or payables workflows. Then evaluate how AI may assist with that work. This provides a starting point based on the way your business operates today.

Data patterns and the amount of historical information that's available greatly influence how helpful AI-generated insights and suggestions will be—the AI needs to be able to find reliable rules, or patterns, to make good predictions or suggestions. Examples are a recurring spike in sales every August, a pattern where customers who buy Product A almost always buy Product B within 30 days, or a recurring pattern where operational tasks take longer during peak periods. When the AI sees patterns multiple times in your business's history, it can better predict future outcomes.

Understanding what data you have, how it flows through your processes, and where it's sourced helps set realistic expectations.

Best practices for assessing AI readiness

- Define your workflows. AI works best on specific tasks with defined goals. Ensure the workflows you want to enhance have clear, documented steps in NetSuite.
- Audit your data structure. Review the essential fields and records your workflows rely on. Clean, consistent data like that in your NetSuite instance is the fuel for accurate AI suggestions.
- Identify friction points. Collaborate with cross-functional stakeholders to pinpoint exactly where processes stall or require manual data gathering from multiple records or sources.
- Regularly re-evaluate. Schedule periodic reviews of your AI readiness, especially after system updates, new SuiteApp installations, or changes to custom forms, to keep AI outputs aligned with your current system configuration.

2. Identify high-value AI opportunities

Once you have a short list of processes where AI can help, narrow the focus by identifying where AI can provide the most meaningful value.

Maybe your AR team spends hours manually emailing every customer with an overdue invoice. You risk treating a strategic partner who forgot one payment the same as a habitually late payer. Instead of automating all emails, AI can analyze payment history to segment customers. It automates friendly reminders for most clients but can flag high-risk or high-value accounts for a personal phone call from an AR specialist.

Or say purchasing managers rely on static reorder points that don't account for seasonality or sudden trends, leading to stockouts or excess inventory. AI analyzes historical sales trends, lead times, and seasonal spikes to recommend dynamic reorder points. It can draft recommended purchase quantities for review, highlighting why the order is needed, such as a projected increase in demand. This frees up cash trapped in excess stock while preventing lost revenue from stockouts.

In short, keep initial focus narrow and get some wins under your belt. This helps teams build confidence and create momentum for future initiatives.

Best practices for identifying strong opportunities

- Find your supporters. Identify AI champions within your organization at both the organizational level and within each department to advocate for AI adoption, provide feedback, and ensure alignment with business needs.

- Pinpoint data gathering bottlenecks. Identify steps where employees must navigate multiple screens, records, or reports just to gather the context needed for a routine decision. AI excels here by instantly aggregating relevant data from across the system into a single summary or recommendation, drastically reducing "context switching".

- Look for tasks that are repetitive but too complex for RPA. Ideal candidates are workflows that follow a fairly standard, repeatable process but require human

review or interpretation at each step. These are prime candidates for AI, which can handle initial analysis and flag only exceptions for human intervention.

- Prioritize predictable outputs. Focus on tasks where the desired outcome is consistent and verifiable, such as a standardized report, a recurring email response, or a specific data entry. Consistent outputs make it easier for teams to evaluate the AI's accuracy and build trust in its suggestions.
- Validate value. Don't assume it. Check in with the employees performing the work to confirm that AI assistance would genuinely save time or reduce frustration, rather than adding a new layer of review work.

3. Establish well-governed, secure AI practices

NetSuite has AI built in, and companies successfully using the suite tend to have roles and data governance established. Using AI with your data builds on the same governance foundation your organization already relies on, so teams can experiment safely and maintain confidence in how information is accessed and used.

By grounding AI initiatives in your established controls, teams can move forward with confidence. This foundation also reinforces that organizations can rely on their current governance models as they prepare for more advanced use cases, where secure pathways and reliable access patterns become even more important.

Best practices for enabling AI securely

- Audit role permissions. Before deployment, verify that the roles using your new AI processes have appropriate NetSuite access levels. AI features are designed to operate within established data visibility rules, so it's important to confirm that roles using these processes have the appropriate access. Say you want to enable an AI feature that summarizes customer interaction histories for your salespeople. Before turning it on, you audit the "Sales Rep" role to confirm that this role has permission to view only customers assigned to their specific territories.
- Map out human oversight. Clearly define where AI tasks mesh with your approval workflows. Identify critical decision points that must remain under human

review to maintain accountability and compliance. An example is our previous dunning emails; maybe a human support agent must review drafts for certain high-value customers and manually send the email.

- Communicate privacy boundaries. Proactively inform employees that AI operates within their existing permission sets. Building trust requires transparency about how AI respects data access limits. Say AI is helping with employee reviews. For example, you might issue a policy that explains that AI-assisted drafts or summaries.
- Pilot governance. Start with a controlled, low-risk pilot, such as record summarization, to test AI behavior against your security policies. Use these findings to refine your governance model before a broader rollout.

Ready? Launch, in stages

AI adoption works best when approached in phases, not only to manage complexity but also to help teams distinguish between areas that are immediately ready for AI support and those that may benefit from additional study before moving forward. This gives organizations a structured way to learn, adapt, and refine how AI fits into their processes as capabilities and comfort levels grow.

Some best practices here include setting scheduled checkpoints, such as monthly or quarterly reviews, to evaluate how AI is performing and identify new opportunities or where you may want to adjust priorities as data quality, process clarity, or team comfort improves.

NetSuite Customer Success AI Services

The Customer Success AI Services can help organizations apply the areas outlined in this guide by reviewing current processes, data, and access models to shape an achievable approach to AI and identify practical starting points that fit their business needs. The service combines a guided readiness assessment, education on relevant NetSuite AI capabilities, support for identifying high-value opportunities, and a phased adoption roadmap. These components give teams a clear understanding of how AI can support their goals, help them focus on achievable early wins, and create consensus on how to move forward with confidence.

As organizations put AI into practice, NetSuite can help them refine their approach and extend AI across their operations. Advanced Customer Support (ACS) Managed Services provides this type of ongoing support, helping teams strengthen what's already in place, apply AI more broadly in daily work, and adjust as new use cases and process improvements become possible.

The Customer Success AI Services and ACS Managed Services offer complementary guidance that gives organizations flexible ways to build and sustain momentum as AI capabilities grow in NetSuite.

Next steps

- Connect with NetSuite Customer Success to explore how the Customer Success AI Services can help you assess your environment and identify practical starting points for AI.
- Consider ACS Managed Services for ongoing guidance as AI use cases expand or become more complex.

As AI capabilities evolve, NetSuite Customer Success provides the structure and expertise organizations need to explore new possibilities with confidence.

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