



Commitment. Stakeholder Enrichment. Continuous Improvement.

Case Study: Professional Services

Client: Upwind Solutions, Inc.

Upwind Solutions is a growing organization providing wind turbine engineering and maintenance services to owners of wind farms in the Western Hemisphere.

Industry: Professional Services; Engineering & Maintenance Services

Challenges:

- Data was fragmented across several applications and reports did not balance with each other. The same data (service items, customers) needed to be maintained in several locations.
- Lack of integration with Sales, Planning, and Operations with feedback mechanisms.
- Timely and actionable reports. Their ability to see monthly business results were delayed by 4 – 6 weeks.

Solution:

TAG was referred to Upwind during the early stages of their NetSuite implementation. Upwind needed a NetSuite Solution Provider who had expertise in assessing their requirements, identifying the best consultant team and creating a realistic work flow broken down by task, person and date. Some work flows and scripting were known in advance, but TAG identified other areas where efficiencies could be achieved and completed more accurately and timely. TAG provided the NetSuite customization, NetSuite training and project management in order to achieve the results.

- Implemented new processes for Sales and Purchase Order Approval
- **Full Accounting integration** with Inventory Control, Warehouse Management, Order Fulfillment
- **Real-time employee time entry** against jobs.
- More frequent and **accurate billing of customers**
- Opportunities values have a **real-time impact on facilities and human resource planning**
- **25% reduction** in the amount of resources to produce customer invoices
- **TAG came in 15% under-budget**

Results:

Upwind's objective for an ERP system was to reduce the number of applications to as few as possible and streamline operations – from the accurate forecast of Sales Opportunities, capture of employee time and materials usage, to the deployment of resources to meet the needs of the customer engagement, with timely and accurate billing.

They had several systems in place to manage their business and NetSuite was their choice for an integrated web-based business software suite with TAG as their general information systems partner.

For Financial Planning and Analysis, the NetSuite “Advanced Financial Planning” module was implemented by NetSuite Professional Services team. TAG worked in support of the implementation to generate the data needed for the upload into the application.

*...engage in the **success** of everyone we touch.*