

AMBER RIVER CASE STUDY

Introduction

Amber River is a UK-based Financial Planning Group. The team behind Amber River are trusted and respected individuals with a long and successful track record in financial and investment services and a passion for financial planning.

Why SANSA & NetSuite

After selecting NetSuite, Amber River identified they were short of skills and expertise within the system and required support in the management of the implementation project.

Amber River's Group Financial Controller reached out to his sales contact at NetSuite to discuss resource options for their project. NetSuite then directly recommended SANSA, not only as a reputable Project Management solution for their NetSuite project, but also as a trusted and accredited NetSuite Alliance Partner.

The Challenge

As the team at Amber River were all brand new to NetSuite and had no experience within the system, finding a project management solution that could be interfaced between both the team at Amber River and the NetSuite SuiteSuccess implementation team, was top priority.

After partnering with SANSA, it was important for the Amber River team to be overseen efficiently and effectively, while receiving the required training as new challenges became apparent. Navigating the design and configure

stage of NetSuite also proved to be a main challenge within the project, and it was pertinent that Petroc and his team received the proper guidance during this time from SANSA.

The Results

After gaining a full understanding of the needs of the team at Amber River, SANSA successfully collaborated with NetSuite Professional Services to deliver results from start to finish.

SANSA was able to successfully identify and prioritise certain needs within the system early on from previous experience, and this helped accelerate the process and meet all deadlines. For example, SANSA was able to assist Amber River in defining their Charts of Accounts very early on, which helped to establish the basic foundation of the system. Because of this they were then able to move on and prioritise other training needs.

By introducing Amber River to NetSuite so effectively, SANSA has ensured the team can confidently navigate the NetSuite system in a way that keeps their business successfully moving forward.



AMBER RIVER



SANSA