

Case Study

"PKF Digital has given our business the confidence it needs to drive into the future. We have confidence in NetSuite and the right support in PKF Digital to remain flexible and adaptable in an increasingly uncertain environment"

- Kate Barr (Information Systems Manager)

How IoD successfully future proofed with the help of PKF Digital and NetSuite...

The Institute of Directors (IoD) is the professional body for directors at the heart of New Zealand's governance community. For 40 years it has maintained a cogent reputation of enabling over 9000 members to add value within their organisation and wider communities, helping create a strong, fair and sustainable New Zealand powered by best practice governance.

After doubling in size since the 2011 implementation of an antiquated legacy ERP, IoD successfully made the switch to NetSuite in 2019, the ERP of choice for membership organisations across Australia and New Zealand.

Kate Barr (Information Systems Manager) and Sally Jarvis (Information Systems Executive) were present throughout this whole process, their combined institutional knowledge of IoD allowing them to feel confident that NetSuite could meet their organisations needs - *"We absolutely love it...*

We now have the ability to actually look at the data we have always held and respond to colleagues quickly with that information".

The benefits of NetSuite to Membership Organisations:

- Streamlined budgeting and forecasting
- Single point of truth for all membership data
- Real-time data insight and visibility
- Seamless User Experience
- Automated member management
- Integrated accounting system
- View all member activity in succinct dashboard
- Increased productivity through automation of manual tasks.

"The staff user experience has been the biggest plus in terms of removing the fear of moving to a new system "

After being hit by COVID just 4 months into the introduction of NetSuite, IoD wanted to ensure that they had the best possible partner support to "take away some of the fear of uncertainty" (Kate Barr). This is when PKF Digital's Hypercare Agreement was introduced.

Hypercare with PKF Digital is a three month engagement that directly follows the initial implementation engagement. It is designed to allow organisations like IoD to attain more value from the NetSuite platform, whilst also maintaining critical support and service during changes to BAU.



As IoD implemented necessary changes to their organisation, such as establishing remote webinars for members, Hypercare allowed for PKF Digital to help implement and execute these changes to workflows within NetSuite. Kate Barr emphasised the value Hypercare has to IoD, particularly referencing the *“peace of mind that comes from knowing we can reach out to PKF Digital for both elective and urgent issues - We are now out of our crisis response, and looking at enhancements and ongoing learning, to ensure we can respond to business needs as they come up”*.

PKF Digital Hypercare: Minimising uncertainty when it matters

Objectives	PKF Digital solution	Positive results
<p>Ensure IoD were utilising their NetSuite instance to its maximum value</p> <p>Efficient transition from NetSuite implementation to post go-live</p> <p>Maintain a reliable relationship and support with PKF Digital, through the unpredictability of COVID-19.</p> <p>Remaining proactive and agile as an organisation</p>	<p>PKF Digital Hypercare - A three month support program designed to ensure NetSuite users transition into the post-go live period with ease.</p> <p>For IoD, this support period included access to:</p> <ol style="list-style-type: none"> 1. Dedicated Customer Success Manager 2. General support from the delivery team 3. Designated hours to small project work and enhancements to maximise NetSuite's potential. 	<p><i>“From a management perspective, Hypercare mitigates our risk”, Sally Jarvis. “It feels like we aren't isolated, and PKF Digital an extension of our team. We feel like we have an organisation that knows us, and the team is definitely aware that we have a resource we can tap into with the hypercare agreement in place”.</i></p>

The strong established relationship between IoD and the whole team at PKF Digital has ensured a better understanding of business requirements, allowing IoD to develop a roadmap for their future. Fundamental to this accomplishment is clearly both the potential that comes with NetSuite, as well as the PKF Digital Hypercare Agreement.

On both a management level, *“where there is trust on both sides of the relationship”*, and from a functional perspective, where IoD has access to a team of certified NetSuite consultants to undertake small project and support work, it is apparent that the Institute of Directors (NZ) remains confident in PKF Digital to build on the wealth of knowledge already present, and guarantee NetSuite is being fully utilised within the organisation.