

FEATURED CLIENT



"SpearMC helped us with our NetSuite implementation in a short amount of time. Our legacy accounting system was no longer keeping up and we needed to scale for growth."



CHALLENGE PRESENTED

Migrate from Intacct and implement NetSuite with a tight turn-around of ten weeks.



PROPOSED SOLUTION

Build an aggressive, yet carefully considered project plan that includes automated banking solutions, custom reports and three years of historical conversions.



RESULTS ACHIEVED

After ten weeks of hard work, SoFi went live on NetSuite. On the first day, over 1500 checks and ACHs were processed in NetSuite. Six weeks later, SoFi closed their first month in Netsuite, produced financial reports, and performed real time system analysis.

TACKLING INTEGRATION CHALLENGES TO ACCELERATE SUCCESS

Social Finance Inc. (SoFi) is a leader in marketplace lending, with over \$2.5 billion in loans issued. They help early stage professionals accelerate their success with mortgages, personal loans, refinancing and student loan options. SoFi offers individual and institutional investors the ability to create positive social impact on the communities they care about while earning compelling rates of return.

SpearMC is a proven expert in the Financial Services and Alternative Lending space. We have a solid track record of providing NetSuite ERP Implementation and Training services, and our expertise with lending and customer data platforms makes us qualified to tackle complex NetSuite integration challenges.

HOW WE HELPED SOFI SUCCEED

- Streamlined and automated accounts payable and bank reconciliation processes
- Used CSS coding to place all necessary check information into a single template
- Sped up close process and enabled real time data analysis
- Found tested and fixed the bugs found in NetSuite while implementing proper solutions
- Utilized an advanced PDF layout feature in NetSuite to accommodate bank accounts
- Designed creative and intuitive solutions