

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.

HOW WE DID IT

- Streamlined and automated the accounts payable and bank reconciliation process
- Sped up the close process and enabled the ability to analyze data in real time
- Utilized a new advanced PDF layout feature in NetSuite to accommodate several bank accounts
- Used CSS Coding to produce all of the necessary check information into a single template
- Implemented solutions in two days to find, test and fix the bugs found in NetSuite
- Designed creative and intuitive solutions over the course of the project

INTRODUCING SOFI

Social Finance Inc. (SoFi) is a leader in marketplace lending, with over \$2.5 billion in loans issued to date. They help early stage professionals accelerate their success with student loan refinancing, mortgages, mortgage refinancing, and personal loans. 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.



CHALLENGE PRESENTED

Migrate from Intacct and implement NetSuite in ten weeks instead of the usual four-to-six month process.



PROPOSED SOLUTION

Built an aggressive yet carefully considered project plan that included an automated banking solution, custom reports, three-years of historical conversions, and several other side projects.



RESULTS ACHIEVED

After ten weeks of tremendous effort, SoFi went live on NetSuite as planned. On the first day, more than 1,500 checks and ACH's were processed in NetSuite, smoothly. Six weeks later, the client successfully closed their first month in NetSuite and was able to produce the final consolidated financial reports in their desired format and perform real time analysis directly out of the system.