

Riveron

WEBINAR

From Legacy Complexity to Integrated Performance: How Surescripts Scaled with NetSuite Planning and Budgeting

March 18, 2026 | 1:00pm ET / Noon CT





Webinar Reminders

- During this session, 4 polling questions must be answered to obtain CPE
- Feel free to ask questions using Zoom Q&A
- On-demand video is not eligible for CPE

A follow-up email will include:

- CPE certificate & webinar evaluation form
- Access to today's recording and slides; An opt-in to receive future webinar invites; Presenter contact info

How Surescripts Scaled with NetSuite Planning and Budgeting

Objectives for today's webinar:

- Recognize when legacy planning tools are holding finance back and what modernization can look like
- See how integrated ERP and planning platforms improve visibility and control across finance operations
- Learn how driver-based and predictive forecasting improve accuracy and decision speed
- Discover how automated reporting and real-time dashboards elevate financial insight for leadership

Moderator



Hilary Cabodi
Managing Director,
Risk Advisory

Riveron

Panelists



Steve Ritter
VP, Controller

surescripts



Marla Block
Director, FP&A

surescripts



MJ McMullen
Director, FP&A

surescripts



Talha Zamir
Director, Finance
Transformation

Riveron

POLLING QUESTION

1

Riveron

How would you describe your current FP&A environment?

- A. Fully integrated ERP + planning platform
- B. ERP + Standalone planning tool
- C. Multiple disconnected systems
- D. Impairment considerations
- E. Primarily Excel-based
- F. Outsourced/hybrid approach

Surescripts' FP&A Transformation Imperative



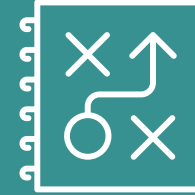
- Legacy system investment cycle reached its natural endpoint
- Private equity ownership introduced new demands
- Scaling requirements exposed system limitations
- Strategic shift toward future-ready capabilities
- The convergence of factors created a clear trigger point

Addressing the Challenges



- Workforce planning was slow, manual, and rigid
- Scenario planning was operationally constrained
- Lack of real-time decision support
- Disconnected systems and limited integration
- Limited visibility and drill-back capability

The Strategic Decision



The Decision: Modernize within an integrated NetSuite ecosystem

- Unify ERP, planning, forecasting, and reporting
- Align finance architecture with long-term growth strategy
- Enable governance, control, and scalable performance

POLLING QUESTION

2



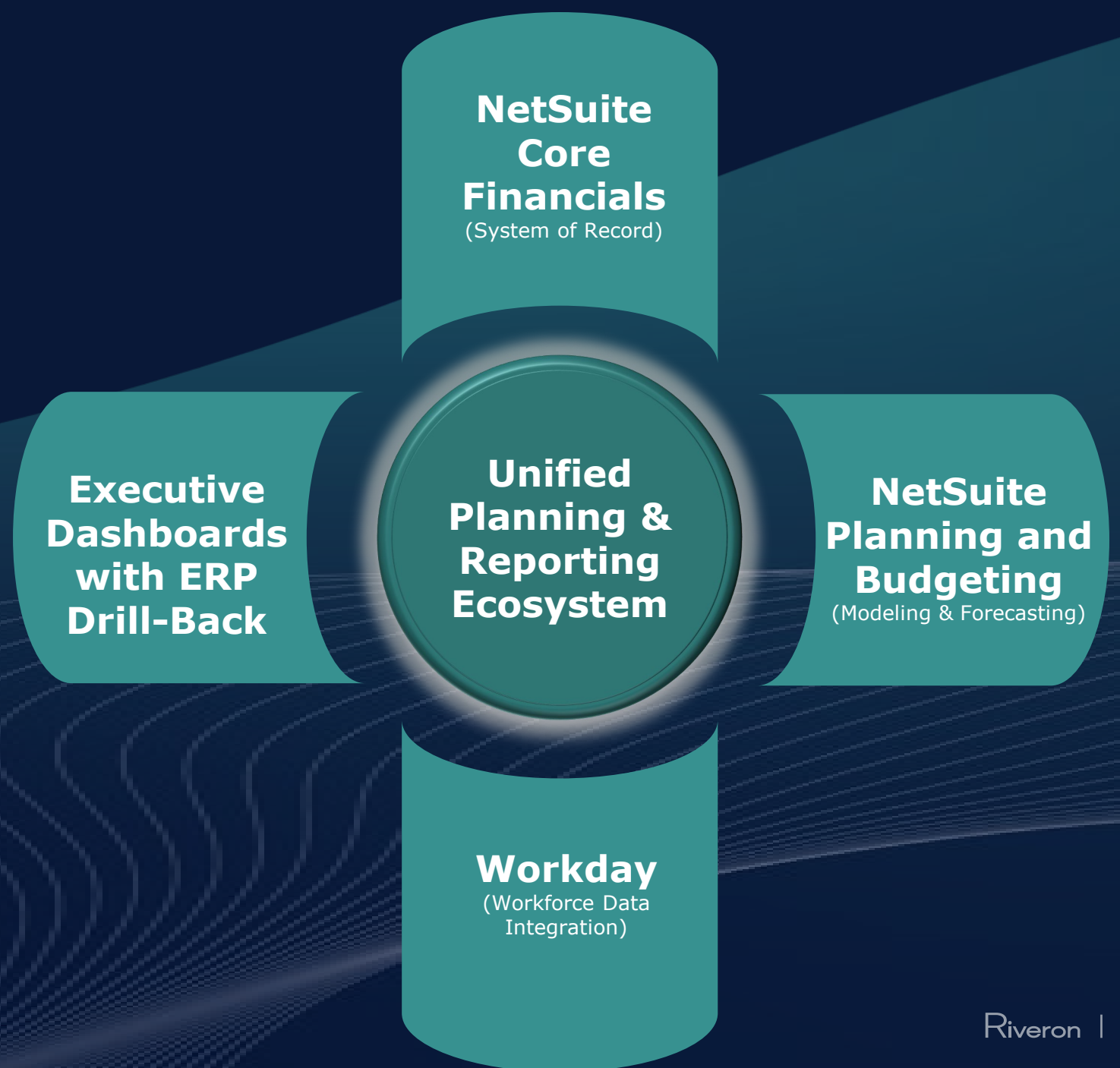
What is your biggest challenge in financial planning today?

- A. Forecast accuracy
- B. Data consolidation and manual effort
- C. System scalability
- D. Workforce planning alignment
- E. Executive reporting visibility
- F. All of the above

Future-State Broad Architecture

Surescripts Goals:

- Drive stakeholder engagement & accountability
- Improve agility, speed, and automation
- Support increased complexity & PE reporting needs
- Enable more advanced & predictive planning
- Establish a scalable, phased transformation approach



Timeline and Phased Approach for Surescripts

6-8 Months

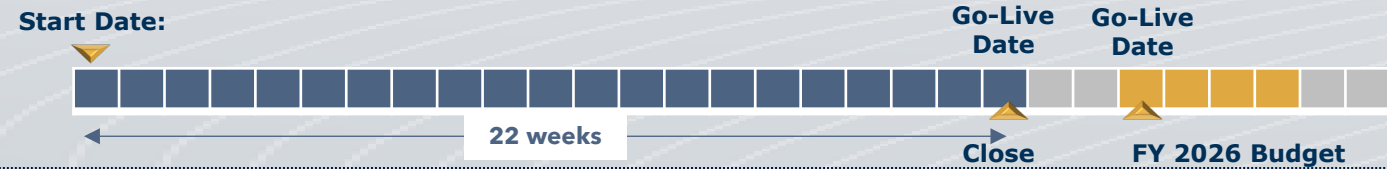
Workstream 0:
End to End System Landscape Mapping



Workstream I:
NetSuite Implementation (Accounting)



Workstream II:
NSPB Implementation (Financial Planning)



Workstream III:
ZoneBilling Implementation (Revenue & Incentives)



Phase II:
Enhancements & Optimization

Optimization opportunities and additional requirements identified during each phase assessed for their impact on the critical path. Any such requirements will be deferred to the Optimization phase.

Implementation Journey

Phased modernization with measurable milestones

**Automation
& Reporting**

**Driver-Based
Forecast
Model
Development**

**NSPB
Predictive
Planning
Enablement**

**Workforce
Planning
Integration**

**User
Adoption**



Application Ownership & Maintenance Model



How Surescripts sustains the FP&A Model

- Finance-Led ownership with Cross-functional support
- Importance of a “Power-User” / Internal Champion
- Designed for low ongoing maintenance
- Routine maintenance embedded in close cycles
- Flexible model for lean teams

POLLING QUESTION

3



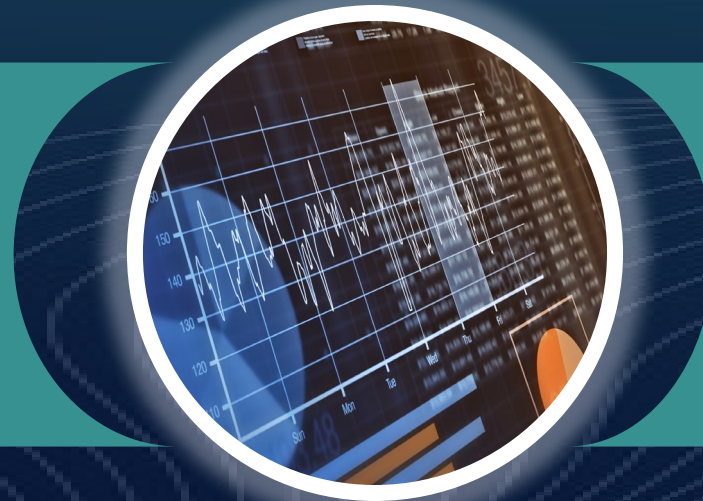
How many systems are involved in your monthly close-to-report process?

- A. 1-2
- B. 3-4
- C. 5+
- D. Primarily manual spreadsheets
- E. Not sure

Business Impact and Lessons Learned



**Improved
performance and
calculation efficiency**



**Governance and
change
management**

POLLING QUESTION

4



What is the biggest barrier to modernizing your planning environment?

- A. Budget constraints
- B. Competing IT priorities
- C. Change management/user adoption
- D. Data quality issues
- E. Leadership alignment

Closing Perspective



Integrated planning is not a system upgrade — it's a strategic capability shift

- From reactive reporting to forward-looking insight
- From manual consolidation to scalable architecture
- From siloed data to enterprise transparency

Thank you for joining today's webinar!

Q&A and Related Resources

Riveron is a leading business advisory firm. We partner with the office of the CFO, private equity, and other capital providers to elevate performance across the transaction and business lifecycle.

[Learn More.](#)

ORACLE
NetSuite
Alliance Partner

Insights
Turning Audit Season into a Value-Creation Opportunity
An audit can serve as more than just a snapshot of past performance. Businesses can use audit feedback to inform strategic decisions. Explore practical steps for extracting value from the process.
Helen Mason

Insights
Accounting for Equity: Avoiding Pitfalls and Seizing Opportunities This Audit Season
Equity and cap table management present risks during the audit cycle. Learn how to implement the pre-emptive processes and technical assurance required to manage this risk and transform your equity administration into a value driver this audit season.
Valerie Flanigan, Keith Ma, Brian Aubuchon

Insights
Q4 2025 Accounting Advisory Guide: The AICPA Conference Highlights a Profession at an Inflection Point
In this 2025 AICPA Conference brief for CFOs and accounting leaders, Riveron professionals highlight the most significant regulatory, accounting, and technological trends shaping financial reporting, audit quality, and AI adoption heading into 2026.
Patrick Garrett, Lara Long, Mia Aura, Valerie Flanigan, Kayla Mayfield

Insights
Fueling Private Equity with Operations and the Office of the CFO
While many PE firms have historically built value through a deal-focused strategy, now, many sponsors are finding they must pivot their focus to improving PortCo operations, particularly within the office of the CFO.
Nate Heeren



[Visit Our Website](#)



[Contact Us to Connect with One of Our Experts](#)



[Riveron.com](#)