CLIMB ASSESSMENT

Most companies don't need a new ERP
They need a clear path in the one
they already own.

SWITCHBACK
Advisors

Why **CLIMB**?

Stop the Band-Aids. Start Fixing the Right Things.

You've invested in NetSuite. But if your teams are still relying on spreadsheets, workarounds, and hallway conversations to get through the day, the system isn't delivering its full value.

The **CLIMB** Assessment is designed for NetSuite users who know something's off, but need clarity before committing. Switchback Advisors help you uncover the areas that are slowing you down and map a strategic path forward, grounded in how your business actually works.

Typical Signs You Need a **CLIMB** Assessment:

- ☐ You're licensed for NetSuite but still using Excel to run the business

- ☐ Customizations or workflows are confusing, brittle, or outdated

- ☐ Department teams are disconnected

- ☐ NetSuite users experiencing friction, lag, or reliance on workarounds

- ☐ Financial reports take too long and still need "manual cleanup"

- ☐ Inventory shows as available—but isn't

- ☐ Companies preparing for growth or restructuring

- ☐ Your CFO doesn't trust the numbers. Neither do you.

If your system feels like more of a workaround than a workflow, **CLIMB** is your first step toward

untangling it, helping you fix the root issues, not just the symptoms.

What Is **CLIMB**?

With **CLIMB**, you get more than just a health check, you receive a clear, strategic understanding of how your NetSuite environment supports or hinders your operations. We deliver a comprehensive diagnostic across business processes and system configuration, uncovering inefficiencies, misalignments, and untapped functionality.

What You Get with CLIMB

Through our 5-phase Framework, you'll receive a detailed Business Terrain Map summarizing key findings, prioritized recommendations, and practical next-steps tailored to your goals.

Whether you're looking for quick wins or planning for long-term growth, **CLIMB** gives you the clarity, confidence, and next steps to align NetSuite with the way your business actually works.

	Current State Assessment	Deep-dive discovery workshops with department teams to understand how the business really runs.
	Landscape Analysis	System and configuration audit. We review NetSuite features in use, performance, access control, and module alignment.
	Identify Improvements	We document the gaps, workarounds, and hidden inefficiencies holding your team back plus missed opportunities and functionality.
	Mapping Forward Path	You get a document highlighting quick wins, process adjustments, technical configuration guidance, and long-term improvements.
	Business Optimization	Use your Business Terrain Map as a strategic plan you can own. You decide on next steps and priorities.

What Makes **CLIMB** Different?

CLIMB isn't just a review - Unlike standard health checks or reimplementation pitches it's a catalyst for strategic improvement.

What clients achieve after a CLIMB Assessment:

- **Faster, cleaner reporting** controllers and CFOs get visibility they trust

- **Smarter controls** fewer delays, reliable data, better margins

- **Elimination of manual processes** tighter intradepartmental alignment

- **Clear priorities** know what to fix now, what to delay, and what to ignore

Client Outcome Snapshot

BEFORE	AFTER
A multi-entity client required users to manage separate logins for each subsidiary—resulting in user confusion and extra license costs.	We customized employee records and automated subsidiary email routing—reducing logins, consolidating access, and cutting license costs.

Are you ready to **CLIMB**?

CLIMB assessments typically take 2–4 weeks and you take with you a tailored Business Terrain Map.

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