

GARY B. MEISNER, MBA / CPA • SENIOR FINANCIAL AND I/T EXECUTIVE • NETSUITE CONSULTANT

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NETSUITE ERP IMPLEMENTATION CONSULTING AND RELATED EXPERIENCE

Iron Solutions, Inc., Franklin, TN, \$10M VC-backed, data, software and media services provider

- As the company's CFO, led the implementation of NetSuite cloud-based SaaS software for this recurring-revenue subscription business.
- Worked with NetSuite consultants for eight months on every aspect of NetSuite's system configuration. This included the design and architecture of all system tables (customer, vendor, item, account, locations, departments, employees, transactions, etc.), data conversions from legacy systems, creation of custom fields, development and testing of business processes, and audit of post implementation results.
- Received NetSuite training in system administration, analytics (reports, searches, dashboards) and financial reporting.
- Used NetSuite almost daily for five years in my role as CFO to improve business processes, perform analytics on all aspects of the business and create executive level reports for management and the board of directors.
- Provided oversight to system administrators on best practices for system architecture and business processes.
- Implemented other cloud-based applications by NetSuite partner solution providers, including:
 - Avalara, for sales tax calculations and reporting.
 - TribeHR, for human resources management.
 - HOST Analytics, for budgeting, forecasting and financial reporting.
 - Adaptive Insights, for budgeting, forecasting and financial reporting.
 - Nexonia, to automate employee expense reporting.
 - AVT, to automate fixed asset accounting and reporting.
 - Cybersource, to automate customer payments via credit card within NetSuite.
 - eFax, to automate faxing of documents to customers from within NetSuite.
- Attended NetSuite's annual Suiteworld conference on several occasions for product training and updates, and identification of new business solutions.

NetSuite Alliance Partner Senior Implementation Consultant

- Worked with NetSuite Alliance Partners in presales, project management, training, client relationships and pre/post implementation services.
 - Industries covered include wholesale/distribution, manufacturing, rentals and technology
 - Functional areas covered include all ERP/CRM and Financial processes, including Record to Report, Design to Build, Lead to Quote, Procure to Pay, Order to Cash.

Interim CFO / NetSuite post-implementation support consultant

- Engaged after implementation to NetSuite by Consumer Products company with retail and wholesale markets to serve as interim CFO. Corrected significant errors in accounting and closed year end books.

Established account reconciliation procedures. Improved process flows and efficiencies. Implemented wholesale lead and CRM process. Improved inventory accounting. Implemented credit card payment processing with automated bank reconciliations.

Publishing Client, Private Equity, SaaS Subscription-based and Physical Products

- Participated in eleven month project with a team of ten consultants to implement NetSuite One World.
- Served as lead functional consultant for all financial modules
- Developed hundreds of custom reports and searches. Used SQL formulas, highlighting, filters and other search and report techniques to provide the client with a variety of good reporting tools and process improvements.
- Led the conversion and migration of historical financial and sales data from legacy SAP systems, including database architecture and mapping for best practices. Developed dozens of saved CSV imports.
- Provided leadership on development of chart of accounts, classes, departments, locations and custom fields to provide best practices in reporting and management.
- Served as primary liaison for migration/implementation/integration of other platforms including Stripe/Suitesync, Coastal ACH payment software, ADP, Expensify, Alliant and RevStream.
- Provided leadership to the client and consulting team on best practices for NetSuite implementation and use.
- Conducted client training and walkthroughs of new processes.

Healthcare Client, Public, SaaS Subscription-based

- Participated in seven month project with a team of six consultants to implement NetSuite One World.
- As the only non-NetSuite PS consultant with previous NetSuite experience, provided leadership to the client and consulting team on best practices for its implementation and use.
- In preparation for the move from the parallel test environment to the Production environment, performed a complete review of all NetSuite setup and configuration choices to assure consistency and appropriateness for the business environment. Reviewed all custom list, records, fields and forms in the test environment to assure that they had been completely and successfully migrated to Production.
- Created dozens of revenue recognition and billing templates. Developed an innovative solution to allow automatic handling of revenue recognition on special contracts, which NetSuite's consultants said would be impossible to do. Was recognized by the CFO for the significant reduction in manual work this achieved.
- Converted and imported thousands of contracts from legacy systems and manual spreadsheets into NetSuite. Was described as an "Excel guru" by one of the client staff members, due to my ability to capture a variety of contract terms with Excel formulas and then structure them all in a standardized format for the CSV imports.
- Developed a dashboard for the billing team that managed the work flow of their entire process. This made it easy for the staff to start using NetSuite immediately on implementation, with little need to learn NetSuite's menus.
- Developed a dashboard for the collection team that automated and improved a manual report they were using in Excel to manage collections. Created a set of dashboard reports and KPI's to give the team

the tools they needed to identify and manage collection issues. Converted and imported contacts and collection notes from legacy systems. Created a dunning process using NetSuite's email templates and bulk mail merge capabilities.

- Developed over 250 searches and reports to facilitate the successful implementation of NetSuite and its efficient use by staff after its implementation. Used SQL formulas, highlighting, filters and other search and report techniques to provide the client with a variety of good reporting tools and process improvements.

Financial Services Client

- Completely re-engineered a complex and tedious manual commission calculation system into an automated commission calculation system in NetSuite.
 - Analyzed source inputs that fed the commission calculations with monthly transactions from over 35,000 individual customer merchant accounts from fifteen different service providers.
 - Analyzed calculations and outputs which created the commission checks to 500 partners and employees.
 - Created custom fields in NetSuite to accommodate all aspects of the commission calculations.
 - Developed a single, standardized record to input data form from all fifteen providers.
 - Developed a process to automatically convert all provider inputs for import into NetSuite.
 - Created searches and reports to prepare the commission calculations, payments and journal entries.
 - Created exception reports to identify issues requiring resolution.
 - Reduced the time required to prepare commission checks from several weeks by four people to two days by a single person.
 - Performed an audit of commission checks generated manually and by NetSuite. Found a \$10,000 overpayment on a single check, and was able to prevent its delivery to the recipient.
- Developed a dashboard to track workflow on new customer applications. Completely eliminated the need for their paper-based workflow by capturing all aspects of the process in NetSuite's CRM, order entry and billing modules.
- Provided a variety of other solutions to help the client improve business processes and use NetSuite efficiently.

Retail Consumer Products Client

- Converted historical financial data from legacy systems and imported it into NetSuite.
- Redesigned the G/L chart of accounts to give enhanced reporting and better use NetSuite's capabilities.
- Converted inventory data from legacy systems and imported it into NetSuite. Identified an issue with slow and excess stock in the process. Presented the issue to the owner and was asked to develop a solution in NetSuite that would give them visibility to the problem so that appropriate actions could be taken. Created custom fields in NetSuite and custom reports to provide the required management tools.
- Asked to provide part time CFO services to the company, and subsequently consulted on a variety of business, operational, financial and technology issues. Developed numerous reports and processes in NetSuite to improve business operations and controls.

B2B Cloud-based Services Client, hardware and subscription-based software

- Was asked to review a proposal from a NetSuite partner consultant for an expensive, custom commission system. In several hours was able to show the CFO how he could accomplish what he wanted using NetSuite's standard functionality at no additional cost. Implemented the commission system and had the calculations within two days.
- Developed an extensive dashboard for the executive management team. This automated a number of real-time reports which were previously taking the Controller days to prepare.
- Developed dozens of searches and reports.
- Developed and delivered training for employees.
- Assisted with a variety of needs in defining business processes and creating process improvements.

Agricultural Cooperative Client

- Lead functional consultant on a proposal for the implementation of NetSuite at a large agricultural cooperative.
- Analyzed processes related to critical business functions of patronage and equity accounting, documented the requirements in the proposal and developed methodologies to improve the reporting process.

Pharmaceuticals Wholesale Distribution Client

- Provided consulting guidance on the design of the G/L chart of accounts and use of NetSuite's class, departments and locations to best practice financial and management reporting.
- Provided training on best practice uses of NetSuite for various business processes.

Food Distribution Services Client

- Performed a business process review to identify business needs and develop a proposal for the implementation of NetSuite as the company's complete ERP business solution.
- Evaluated all NetSuite setup and configuration settings in response to the needs identified in the business process review.

Equipment Rental Client

- Client had Advanced Revenue Module installed by NetSuite consultants, but they incorrectly choose item types that created revenue arrangements and revenue recognition for all of the client's 500 inventory items. As the client's business is in equipment rentals, they recognize all revenue immediately upon billing. After assessing various solutions, did a complete reimplementations of all Items, including pricing tables and custom fields associated with the rental module provided by NetSuite partner.

National Elementary Education Client

- Migrated financial data from 80 separate Quickbooks databases to a single instance of NetSuite OneWorld.

- Assessed and proposed strategies to most simply and efficiently convert financial data from Quickbooks to NetSuite.
- Developed a consolidated account map for the conversion and created new accounts as needed.
- Imported financial history into NetSuite. Collaborated in development of a method to bring in all client detail transactions for the previous period rather than just the net monthly changes.
- Performed audits of imported financial results to assure consistency with source data from Quickbooks.
- Created new reports in NetSuite to replace those used in Quickbooks.

Consumer Wearables High Volume Retailer

- Participated in implementation scoping and business requirements development workshops on \$100 million retailer of consumer wearables, phone cases and more with custom printing.
- Analyzed the pros and cons of various costing methodologies, including standard costing and average costing for different items types, including matrix items, kits and assemblies. Developed prototype items, customers, vendors and transactions in NetSuite to demonstrate the impacts on both the financial and operational side of the business.

Pre-Sales Consulting and Solutions Consulting

- Performed pre-sales and solutions consulting work with several Netsuite Partners on dozens of NetSuite prospects in a variety of industries. Worked closely with NetSuite sales team to provide an implementation solution through these partners, two of which had offshore resources. Solutions required knowledge of NetSuite ERP/CRM/Financials as well as various ecommerce platforms, application integrations/connectors, data migration strategies and business practices to understand client needs and provide confidence in their decision to move to NetSuite and use our services.
- Attended SuiteWorld on behalf of an implementation partner to represent them in their vendor booth. Engaged with prospects in a variety of industries to identify opportunities to sell our services.

Biotechnology Company

- Provided consulting services on best practice implementation in NetSuite of the chart of accounts, subsidiaries, locations, classes and departments, as well designing the best income statement structure to meet their needs for reporting and analysis.

Construction Product Manufacturing Company

- Served as project manager, client liaison and senior functional consultant on the implementation of NetSuite by a manufacturer of pre-fabricated wood components for the residential construction industry.

Automotive Electronics Company

- Served as project manager, client liaison and senior functional consultant on the implementation of NetSuite by a manufacturer of automatic video equipment systems.

Other Related Experience

- Served in dual CFO/CIO roles in operating units of six companies (public and private) over a period of 25 years.
- Led the implementation of a variety of business systems including ERP, MRP, general ledger, financial planning, forecasting and reporting, business intelligence, human resources, fixed assets, employee expense reporting and more. This included JD Edwards, Oracle, Hyperion and other top tier systems.
- Developed a unique software application that has sold to thousands of customers in over 70 countries.
- Developed at least two dozen websites for business clients and my own businesses and personal interests.

NetSuite Experience by Module

ERP

Financial
Customers
Vendor
Billings
Banking
Inventory
Purchasing
Sales
Order Fulfillment
Employees
Customer Center
Commissions
Manufacturing

Reporting

Searches
Reports
Dashboards
Imports
Exports
KPI's
Snapshot Reports
SQL coding

Setup

Company
Accounting
Sales
Marketing
Import/Export
Users
Roles
Permissions

Documents

Files
Templates
Mail merge

Customizations

Lists
Records
Fields
Forms
Centers and tabs

CRM

SFA
Marketing Automation

Financial Planning

EDUCATION

University of Chicago / Booth School, Chicago, Illinois, **M.B.A. in Marketing and Finance**
University of Illinois, Champaign, Illinois, **B.S. in Accountancy, (High Honors)**

PROFESSIONAL AFFILIATIONS AND CERTIFICATIONS

Financial Executives International

Chapter President, V.P., Programs, Membership, Career Services, Web Chair, Board

American Institute of Certified Public Accountants

Certified Public Accountant, State of Illinois